



# Qualitative Priorities Research

**Bristol Water**

AUGUST 2022



# Version control

| Document information        |  |
|-----------------------------|--|
| <b>Client</b>               | Bristol Water  |
| <b>Company</b>              | Office for Public Management Ltd trading as Traverse |
| <b>Title</b>                | Qualitative Priorities Research                      |
| <b>Subtitle</b>             | N/A  |
| <b>Dates</b>                | 31/08/2022   |
| <b>Status</b>               | Draft  |
| <b>Classification</b>       | Restricted   |
| <b>Project code</b>         | 11361  |
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# Executive summary

## Introduction

As part of Bristol Water's PR24 business planning, this research aims to gain qualitative insight into customers' priorities and how they differ across different customer audiences. In summer 2022, on behalf of Bristol Water, Traverse engaged with people broadly representative of local customers, as well as customers in financially vulnerable situations (CIFVS), those in vulnerable situations and future customers aged 18-24.

## Overview of method

Traverse conducted the research using in-person focus groups for all apart from those in vulnerable situations, where we conducted one-to-one online depth interviews. Participants were provided with key information about nine different priority areas and were asked to discuss and reflect on their priorities. They were also asked to consider if there were any issues not covered by the priority areas.

## Key findings

- Participants across all audiences sometimes struggled to understand the difference between **affordability and vulnerability**. As a result, participants often talked about them interchangeably. The audiences all agreed that both topic areas were 'must have' priorities because it's vital that everyone has access to water. However, some discussed affordability and vulnerability as societal issues and therefore questioned whether they should be Bristol Water's responsibility.
- Participants felt that **water quality, reliability, and resilience and leakage** were core activities for Bristol Water and therefore should be Bristol Water's top priorities. However, there was little first-hand experience of poor service in these areas, which meant that while these areas are crucial to the successful functioning of Bristol Water as a water company, they might not need prioritising as areas for improvement, but rather require maintaining at the level that they have been thus far.
- **Climate change and biodiversity and environmental concerns** were seen as very important priority areas in principle across the groups, but participants debated the specific impacts of a water company on the environment, and therefore found it difficult to judge how important it should be to Bristol Water.
- The audiences broadly categorised **perception and performance** as 'must have' but only just. This split was reflected in group discussions where participants questioned why perception and performance were considered a single topic. They felt that they should be separate, with perception a 'nice to have' and performance a 'must have'.

- **Working with communities** was consistently seen as more of a 'nice to have'. This was partly because participants questioned the effectiveness of education about responsible water use, and some felt it was not Bristol Water's responsibility at all.

We also asked participants to tell us about anything they felt was missing from the topic areas. They highlighted a lack of any plans to support customer knowledge about water meters, as well as an intention to support customers who are digitally excluded. They also wanted to see more adaptation and mitigation plans against water scarcity and more support for decarbonisation of homes under resilience and leakage. Under perception and performance, they wanted to see a commitment to more transparency as a company. As well as this some highlighted difficult language or important context missing from the topic area descriptions that they felt would support customer understanding going forward.

# Introduction

## Context

As part of its development of the PR24 business plan, Bristol Water is undertaking an extensive period of customer engagement to understand views and priorities of differing customer segments. The first stage of this was a desk review of the priorities research undertaken in preparing the PR19 Business Plan and relevant 'business as usual' research. This identified the key topic areas:

- to be discussed with focus groups (this project);
- that required more desk research; and/or
- that required deliberative engagement.

This research will ultimately feed into the business planning process and help shape Bristol Water's 2050 ambitions.

## Objectives

The objectives for this research were to **understand which topic areas identified in the engagement strategy customers prioritise and why**, and **to gain qualitative insight into how views differ between audiences**.

Bristol Water wanted to gain insight from customers broadly representative of its customer base. Additionally, to understand diversity in views from audiences most likely to be impacted by the Covid-19 pandemic, Cost of Living Crisis and climate emergency.

## Approach

Traverse is an independent social purpose consultancy, working with Bristol Water to design and deliver research and engagement to form evidence in support of the PR24 Business Planning process.

Traverse designed and delivered face-to-face focus groups for each audience, apart from those in vulnerable situations, where we ran online one-to-one depth interviews.

## Reading this report

### Structure

This report is organised by topic area or group of topic areas ordered from 'must have' to 'less important' based on the opinion of the majority of participants across all audiences and outputs. The audience experiencing financial vulnerability are referred to as CIFVS (customers in financially vulnerable situations) throughout.

## Use of quotes

Quotes are used throughout the report to illustrate points, not replace narrative. When using participants' own words, these are provided verbatim from facilitator notes, recordings, or from surveys, without changes to spelling or grammar although square bracket additions may be used on occasion to clarify. The data the quote has been drawn from is also provided by a caption explaining the audience they were from and where applicable whether the quote was from a group activity, or written on their survey form. For example:

**“This is a quote”**

**Mixed audience participant, group activity**

## Qualitative focus groups and quantifiers

The number of participants (31), and qualitative approach, mean that findings should be considered illustrative rather than statistically representative of public views.

On this basis we have not used strict quantifiers. Instead, findings under each priority area are organised by most to least prominent.

Where differences have been identified by audience, these should not be interpreted as demographic patterns. As with all research, this report is a snapshot in time. People's views may change significantly in the future.



# Methodology

Traverse worked with Bristol Water to turn the research objectives into research questions and design a qualitative process.

## Research questions

- Which out of Bristol Water's topic areas do customers prioritise and why?
- How do views differ between customer audiences, specifically customers in vulnerable situations, CIFVS and future customers aged 18-24?

The nine topic areas participants discussed are:

- Affordability
- Perception and performance
- Reliability
- Resilience and leakage
- Vulnerability
- Water quality
- Biodiversity and environmental concerns
- Working with communities
- Climate change

See appendix 5 for full topic area descriptions.

## Recruitment and sampling

We worked with a recruitment agency to recruit 31 Bristol Water customers living in Bristol or Weston-Super-Mare and the close surrounding areas. Each audience had representation across the key demographics of gender, ethnicity, and age (where appropriate), as well as a mix of customers with water meters and those without (see appendix 2). For the mixed audience, we recruited a mix of Bristol Water's key customer segments (see appendix 1). Across the remaining audiences, CIFVS, future customers, and customers in vulnerable situations, we aimed for a mix of customer segments where possible.

## Design

We delivered three evening focus groups across two days in August 2022:

- The mixed customer audience took place in Bristol.
- CIFVS and future customers took place in Weston-Super-Mare.

One-to-one depth interviews with customers in vulnerable situations took place online on the Zoom platform. This was to support participation of those in this audience, on the basis that they may find travel and in person events inaccessible, for example due to mobility issues or health conditions.

## Process

The focus groups were designed to explore audience consensus around the prioritising of the nine topic areas as well as individual reflections. To do this, participants were first introduced to the priority areas by a Bristol Water representative followed by a short Q&A.

Participants were then encouraged to discuss each topic area as a group and sort them into 'must have' 'nice to have' and 'less important' (see appendix 3 for results). This was followed by an individual survey where participants had the opportunity to sort the topic areas individually (see appendix 4 for results). Lastly, participants were encouraged to think about whether they felt there were any topic areas or important details missing.

For the one-to-one interviews the same process was followed but in an individual and abridged format.

# Findings

To understand which topic areas customers prioritise and why, we collated all outputs from across the research: the group prioritising activity as well as individual priorities from the survey and interviews. The below table shows that **overall**, all the topic areas apart from 'Working with communities' were seen as 'must have' priorities.

However, as detailed in the findings below, views on each topic were nuanced and mixed across different audiences, as well as between group and individual data.

| Must have   | Nice to have             | Less important |
|---|--------------------------|----------------|
| Climate change<br>Reliability<br>Resilience and leakage<br>Water quality<br>Affordability<br>Vulnerability<br>Biodiversity and environmental concerns<br>Perception and performance | Working with communities |                |

## Core topics

### Affordability and vulnerability

Participants across all audiences sometimes struggled to understand the difference between affordability and vulnerability. As a result, participants often talked about them interchangeably.

The audiences all agreed that both topic areas were 'must have' priorities because it's vital that everyone has access to water. However, participants discussed to what extent this is Bristol Water's responsibility. For example, some felt that Bristol Water should focus on supply and that supporting customers with bill affordability and those in vulnerable situations should not be within their remit. The participants' individual survey results reflect the group discussions. Most ranked both affordability and vulnerability as 'must have'.

### Affordability

Audiences agreed that water is an essential resource and should therefore be affordable. Many also referenced the Cost of Living Crisis, suggesting that bill affordability will be at the forefront of many people's minds. However, they debated whether it is Bristol Water's responsibility to support those struggling with bill

affordability, as some suggested it was the Government's role to help those in water poverty.

Similar to the other audiences, the mixed set thought affordability was a 'must have'. Unlike the others however, the conversation was dominated by water meters. Some were suspicious towards Bristol Water, about the motivation behind forcing new customers and houses to have meters. Some were anxious about having another bill that could rise substantially at a time when people are finding it difficult to cope. Some were also worried about the impact of leaks on households with water meters or feeling restricted in water use.

**“You've got two years to decide if you want to change back from a water meter or not, but in those two years, once x amount of people have switched over [to water meters they can't change back] they are going to up the bill”**

**Mixed audience, group activity**

**“The choices are if you don't like your bill you can go on to a water meter but as soon as I hear that I think restriction”**

**Mixed audience, group activity**

The customers in financially vulnerable situations audience (CIFVS) had a debate about water meters in relation to affordability. One participant in particular had one which saved her money. Her encouraging feedback helped the rest of the group to understand the positive aspects of water meters more generally.

All the groups had some debate about whether affordability was a responsibility for Bristol Water specifically, but this was strongest in the future customers audience. They viewed water poverty is a societal problem and therefore felt it should be tackled by the government. They explored the concept of water as a human right, which reinforced their view that access to water should be assured for everyone through the state. They also felt that this might support equity by reducing the need for special categories at the supplier level.

**“The government should do more to make sure [financially] vulnerable people don't feel vulnerable”**

**Future customers audience, group activity**

Despite this, most of the group still ranked affordability as 'must have' on their individual survey.

## Vulnerability

Participants across all audiences felt that support for vulnerable customers was a 'must have', particularly those who, during discussions, reflected on the kinds of situations where a loss of water supply could be a medical emergency.

Participants from the vulnerable audience felt that Bristol Water should be advertising their vulnerable customer support more, because people might be struggling, and their personal circumstances might make them eligible to be included in the vulnerability register.

**“You need to think of the amount of people who are in some way disabled, mentally also. Any shortages or stops or interruptions are very distressing to them, especially if they are on their own.”**

### Vulnerable audience

Participants from the vulnerable audience linked vulnerability with perception and performance, as accessible customer service would contribute to the support of vulnerable customers.

**No use looking after vulnerable customers if they can't get through to you over the phone”**

### Vulnerable audience

## Water quality, resilience and leakage, and reliability

Participants spoke about water quality, resilience and leakage, and reliability as interconnected and, therefore, often interchangeably. Participants across the audiences moved resilience and leakage, water quality and reliability between 'must have' and 'nice to have'. They often saw these three areas as Bristol Water's core responsibilities as a water company. Through discussion and the individual survey, these priorities broadly emerged as 'must haves'.

Throughout the conversations however, it emerged that most participants had little experience of supply interruptions, leaks or poor-quality water. This meant that they still generally categorised these priority areas as 'must haves' from the perspective of a core water company responsibility. However, some participants dismissed the seriousness of, for example, having a supply interruption as they thought that people could access drinking water elsewhere, implying that service interruptions in the context of these priorities would not be particularly disruptive. However, others with personal experience were much more insistent that these topic areas are 'must have'.

## Water quality

Participants across all audiences said that water quality is a core service area for Bristol Water and therefore 'a given' in terms of it being a top priority. They saw it as a 'must have' for the health of the population and that no one should have to worry about what might be in it.

**“That [water quality] would be a ‘must have’ for me because I wouldn’t want to find out its full of...pesticides...”**

**Bill affordability audience, group activity**

Water quality was categorised as a 'must have' by the mixed audience group, but unlike the others, they discussed whether this was Bristol Water's responsibility. Participants felt that those involved in practices that pollute water sources, such as farming, should take responsibility for their operations. They felt it was not fair for this to be paid by Bristol Water and, by extension, their customers. This tension was highlighted in the individual survey, where more participants from this audience categorised water quality as 'nice to have'.

**“It shouldn’t be our money that cleans it when the farmers have made a mess, the farmers shouldn’t put that stuff in in the first place...they have a responsibility, like you don’t go home and pour paint down the drain”**

**Mixed audience, group activity**

One participant from the vulnerable audience, explicitly cited some of the recent media coverage of water companies and concern about the use of chemicals.

**“It’s vital for personal health. I am concerned about the stories of how some water companies treat their water with lots of chemicals, and the impact that can have on the people drinking that water. The water that we are getting from Bristol Water needs to be of a safe and high quality. That’s what we are paying for.”**

**Vulnerable audience**

## Resilience and leakage

Resilience and leakage were broadly categorised as a 'must have' across all audiences. However, a significant minority categorised it as 'nice to have' through individual surveys and interviews. This reflects discussions where participants noted the good work Bristol Water appeared to be doing in this area. They said that because this appeared to be an area of significant improvement, there was less need for it to be a 'must have' priority.

**“It’s not unimportant. it’s important. but it’s not a must have because water still comes through”**

### **Vulnerable audience**

The future customers audience talked about resilience and leakage in the context of climate change. They said that this is a ‘must have’ as preventing the wasting of water through leaks in the context of a warmer, drier world would increase resilience and ensure a more reliable supply.

Similarly, the vulnerable audience often linked resilience and leakage with other priority areas. They said it would contribute to affordability because the service would have a lower running cost, and reliability because there would be fewer disruptions.

### **Reliability**

Participants said that the reliability of having high quality water is vital, particularly for those who would not find it easy to go to a neighbour or access a local shop.

**“A lot of people live alone, and don’t have immediate [friends and family] that they could turn to for support in the case of interruptions.”**

### **Vulnerable audience**

The mixed audience eventually categorised reliability as ‘less important’, although this view was driven by a few dominant participants who felt that a supply interruption in the home would not be particularly disruptive. The individual survey reflects this, where five participants ranked reliability as ‘must have’ or ‘nice to have’ and three said it was ‘less important’.

Participants from the vulnerable audience thought that improving the reliability priority would result in better perception and performance, as customers would have less complaints of the service.

### **Climate change and biodiversity and environmental concerns**

Across all the audiences, participants saw climate change, alongside biodiversity and environmental concerns, as a ‘must have’ priority in principle. They recognised environmental degradation as one of the key challenges facing society. However, although collectively, across all audiences both priorities were a ‘must have’ a notable minority categorised both as ‘nice to have’ through the individual survey, reflecting discussions about Bristol Water’s specific impact and role in these areas.

### **Climate change**

Participants across most audiences debated the amount of emissions associated with a water company to varying degrees. This made them question how important climate change and reducing emissions should be to Bristol Water, compared to

industries they perceived as more carbon intensive. Others thought it depended on Bristol Water's progress in this area to date.

**“No one doubts that this [climate change] is important but how important is it for Bristol Water?”**

**Mixed audience, group activity**

**“It's not a fossil fuel company. The product that they are delivering is not carbon intensive, so no it's not directly relevant”**

**Vulnerable audience**

The vulnerable audience assigned climate change almost unanimously within 'nice to have'. They said that as a water company, climate change shouldn't be a top priority for Bristol Water. Others saw climate change as more of a long-term future focused area, that could have a lower priority over a longer time frame.

**“This affects future generations, so there's a longer timeline”**

**Vulnerable audience**

In contrast, the CIFVS audience consistently prioritised climate change as a 'must have' in the individual survey and group exercise. They felt that the sheer importance and magnitude of the problem meant that it must be a top priority.

### **Biodiversity and environmental concerns**

Across the audiences, participants discussed the difficulty of making a judgment on biodiversity and the environment, as they were not clear what impact Bristol Water currently have on it. However, most agreed that this area should be a 'must have' priority, as, similar to their views on climate change, they commented on the sheer importance and magnitude of environmental problems.

**“[Biodiversity and environmental concerns] is a 'must have' because it's the foundation of everything else”**

**Mixed audience, group activity**

Within the vulnerable audience, biodiversity and environmental concerns were placed between 'must have' and 'nice to have'. Participants connected the priority with other priorities such as water quality and resilience and leakage, suggesting that they all help to support each other.



**“The things here in ‘must have’ [water quality, resilience and leakages] are short term goals and essential and will lead into the ‘nice to have’ which are more long-term goals [climate change, biodiversity and environmental concerns].”**

#### **Vulnerable audience**

Similarly, the CIFVS audience linked prioritising biodiversity and environmental concerns to protecting the water systems infrastructure enhancing reliability and resilience and leakage. Only those in the CIFVS audience consistently ranked biodiversity and environmental concerns as ‘must have’ in the individual survey and group discussion.

### Perception and performance

The audiences broadly categorised perception and performance as ‘must have’ but a clear minority categorised it as ‘nice to have’ through individual surveys and interviews. This was reflected in group discussions where participants questioned why perception and performance were considered a single topic. They felt that they should be separate, with perception (which they understood to be how well they come across to the public) a ‘nice to have’ and performance (which they saw as meeting the needs of customers) a ‘must have’.

**“Well perception is just the perception of good performance; good performance is good performance”**

#### **Mixed audience, group activity**

The CIFVS audience shared this sentiment to a degree, however most understood Perception and performance as customer service. As such they didn’t see customer service as an issue for Bristol Water so ranked it as a ‘nice to have’ with the caveat that it would become a ‘must have’ if customer service declined.

Vulnerable participants in particular had very mixed views about the importance of perception and performance, categorising it almost evenly between ‘must have’, ‘nice to have’, and ‘less important’. Participants commented that Bristol Water’s ability to respond to its customers was crucial and will play a significant role in how customers are able to engage, especially in the future.

**“If the plan goes ahead to charge people more...they need to set themselves a target to respond to calls and emails, acknowledging receipt of email, with an estimate of when you would get a response. This is specifically relevant for this current time with a Cost of Living Crisis”**

#### **Vulnerable audience**

Others felt that Bristol Water's customer service is very good, so doesn't need to be prioritised. Similarly, one participant felt the priority area was irrelevant seeing as customers cannot choose their provider.

**“We can't choose our service provider, so is it relevant? You want the company to have a good reputation, but we have no other alternative water supplier to choose from”**

**Vulnerable audience**

## Working with communities

Participants across all audiences considered working with communities as 'nice to have'. There was some discussion across the audiences about the effectiveness of education in schools about conserving water. Some felt it is not an effective use of time or money.

**“If people want to know, then have things in place but don't waste money talking to people who don't care”**

**Future customers audience, Individual survey**

Participants also talked about whether education in schools is within the scope and responsibility of a water company. Some questioned if Bristol Water does not deliver an education programme on improving best practice and conservation in relation to water, then who else should have the responsibility instead.

**“I think there are lots of other people and organisations that are at the forefront of educating children.**

**But then who are the best ones to educate about what they are supplying? Surely it's the water companies?”**

**Mixed audience, group activity**

Discussions in the vulnerable audience however were a bit more mixed. Some felt that working with communities was a 'must have', as they saw it as an important way to reduce water use and improve water conservation practices for the future. Similarly, others linked working with communities and particularly education with climate change and biodiversity and environmental concerns, because the importance of efficiency would be embedded into future generations.

**“The focus on young people, our kids, the future, and thereby changing behaviours, thoughts and teaching people about water usage is important.”**

### Vulnerable audience

## Levels of understanding

This section highlights participants' understanding, of Bristol Water's nine topic areas. The following comments were mostly raised by participants from the vulnerable audience, as their engagement in this research was through one-to-one interviews, which allowed for a deeper level of engagement.

Participants said that under **perception and performance**, more transparency was needed about how Bristol Water are currently performing, particularly on issues like customer complaints and call handling times.

Participants commented on the target contained within the **reliability** topic area, of keeping water interruptions down to 1.8 minutes per property per year by 2024/2025. They raised concerns about whether it is achievable. Participants also mentioned that they found the target to be unclear, as it could mislead customers in thinking that water supply interruptions would be resolved within 1.8 minutes of notifying Bristol Water.

Some felt that more information was needed under the **climate change** topic area about how Bristol Water is planning to reach that target.

Participants were unclear about what the **vulnerability** topic area covered and thought that some examples might help. They also thought it would be useful to understand how they are updating that information to ensure everyone who qualifies is represented. Participants felt that Bristol Water should be advertising their vulnerable customer support more.

Participants said more information and context was needed on how Bristol Water is planning to achieve the stated target in their **resilience and leakage** topic area.

## Gaps

This section highlights aspects of the topic areas participants thought were missing, and only covers topics where gaps were identified.

### Affordability

Water meters were a recurring theme throughout conversations. They agreed that Bristol Water should be communicating more with customers about them, prioritising education, information, and incentives for their uptake, as well as efficiency more generally. A particular motivation for this was the prospect of saving money and encouraging water efficiency.

## Vulnerability

The future customer group were unsure of who would be included under vulnerability but were keen for it to include those who are digitally excluded. They have witnessed elderly relatives struggle to receive basic services due to not being online and felt there should be provisions in place to avoid this.

## Resilience and leakage

The vulnerable group shared suggestions for Bristol Water to consider adaptation approaches to mitigate issues of water scarcity in the future. These included building more water storage capacity and constructing desalinisation plants. In addition, as water is a key resource in energy production, some suggested that water companies should be involved in conversations around national retrofitting and decarbonisation initiatives.

## Perception and performance

Participants from the future customers group and the vulnerable group felt that a priority to be transparent and accountable to customers was missing from perception and performance. They gave examples such as Bristol Water's company finances, the breakdown of how revenue is distributed, and on Bristol Water's performance in relation to other water companies.

# Conclusion

Overall, participants saw all the topics presented to them as priorities, apart from 'working with communities'. Yet, their reasoning was varied and shows a more nuanced picture. The focus group conversations and one-to-one discussions revealed key variations in **why** various topic areas should be prioritised more than others. Among the most prominent of these were the current Cost of Living Crisis and personal experience of water supply interruptions.

The Cost of Living Crisis is dominating the media, with more and more people falling into, or at risk of falling into, fuel poverty. This was reflected across the audiences as concern about the crisis was a significant topic of discussion. Participants may have also seen it as more directly linked to the context of the service provided by Bristol Water, particularly in relation to affordability and vulnerability.

A few participants across the groups had first-hand experience of supply interruptions which had a huge influence on how they prioritised the topic areas, particularly reliability and vulnerability, often making their views starkly different to the other participants. Participants without first-hand experience were often less invested, finding it harder to understand how certain scenarios would affect them personally.

There were also external factors which could have influenced participants' categorisation of Bristol Water's priorities but ended up having little discernible impact on the discussions.

Covid-19 was the most striking of these. The pandemic has been one of the most prominent social influencers on UK research over the last 2.5 years, having a profound effect on people's views. However, worries about Covid-19 across the general public have been decreasing this year<sup>1</sup>. This likely explains why the subject did not come up naturally in conversation, with the exception of the vulnerable customers audience. They felt that the experience of the pandemic made them think about the resilience of their water supply and being more prepared for similar situations in the future.

The UK was experiencing a heat wave at the time the focus groups were held. This had led to an increased level of media coverage of droughts and accompanying measures to manage them, such as hosepipe bans. Despite this, participants did not bring it up when discussing Bristol Water's priorities.

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1

<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/articles/coronaviruscovid19latestinsights/lifestyle>

# Appendices

## 1. Bristol Water audience segments

### 1.1 Segment characteristics

| Research groups  | 1. Urban young renters              | 2. Mature and measured | 3. Social renters | 4. Comfortable families | 5. Safely affluent | 6. Thirsty empty nesters  |
|------------------|-------------------------------------|------------------------|-------------------|-------------------------|--------------------|---------------------------|
| Age              | <45                                 | >64                    |                   | 35-55                   | 45-64              | 55+                       |
| Household Size   | 1-2                                 | 1-2                    |                   | 3+a                     | 2+                 | 2                         |
| Social grade     |                                     | A, B, C1, C2           | D or E            |                         | A, B               | C2                        |
| Home Ownership   | Private renting                     | Owner occupied         | Social renting    | Owner occupied          | Owner occupied     | Owner occupied            |
| House Type       | Flat, maisonette, or terraced house |                        |                   |                         | Detached           | Semi-detached or terraced |
| Children at Home |                                     | 0                      |                   | 1-3                     |                    | 0                         |

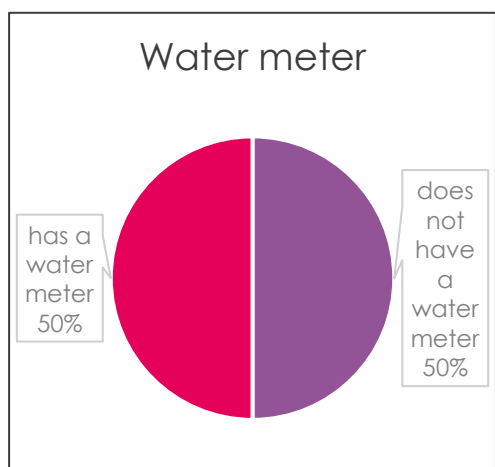
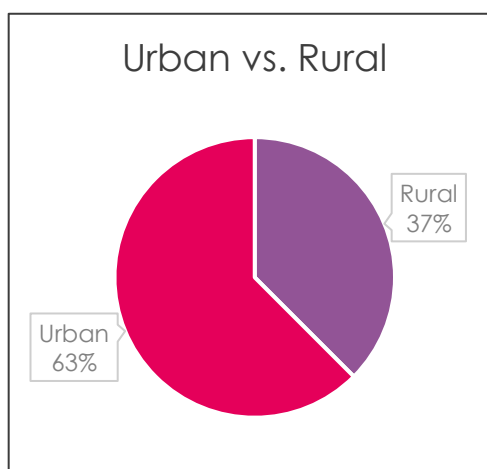
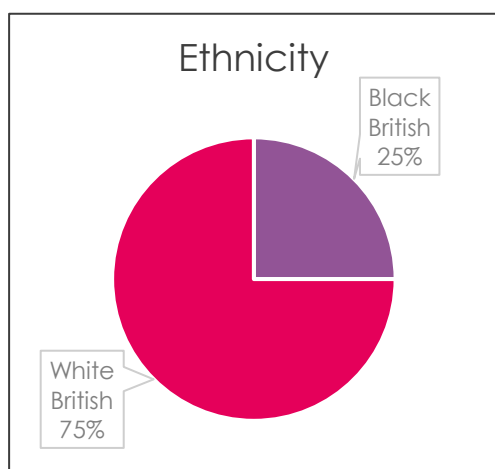
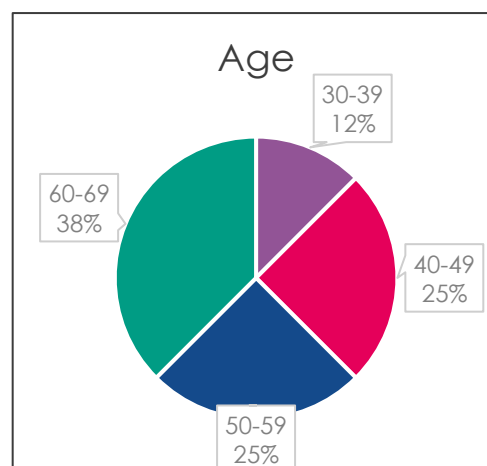
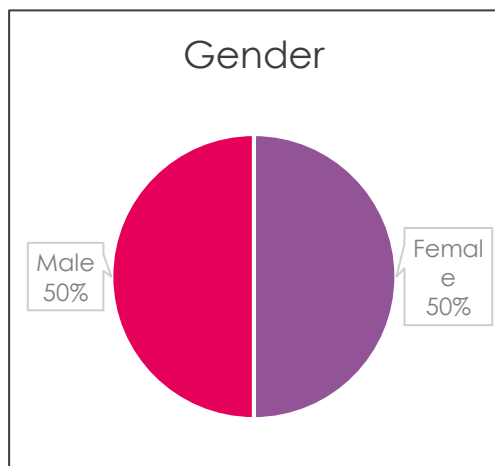
### 1.2 Segment representation by audience

| Research groups  | 1. Urban young renters | 2. Mature and measured | 3. Social renters | 4. Comfortable families | 5. Safely affluent | 6. Thirsty empty nesters |
|------------------|------------------------|------------------------|-------------------|-------------------------|--------------------|--------------------------|
| Mixed            | 1                      | 1                      | 2                 | 2                       | 1                  | 1                        |
| Future customers | n/a                    | n/a                    | n/a               | n/a                     | n/a                | n/a                      |
| Affordability    | 4                      | 1                      | 1                 | 1                       | 0                  | 0                        |

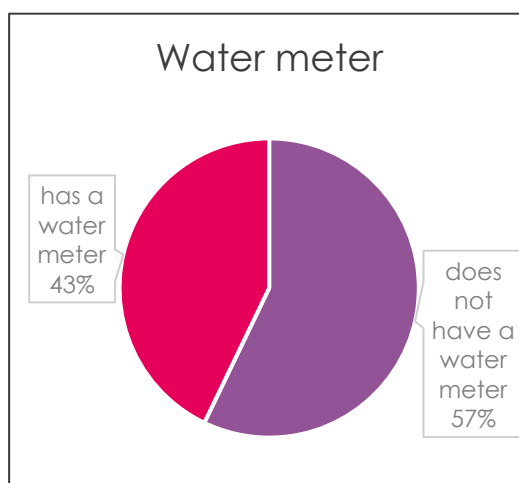
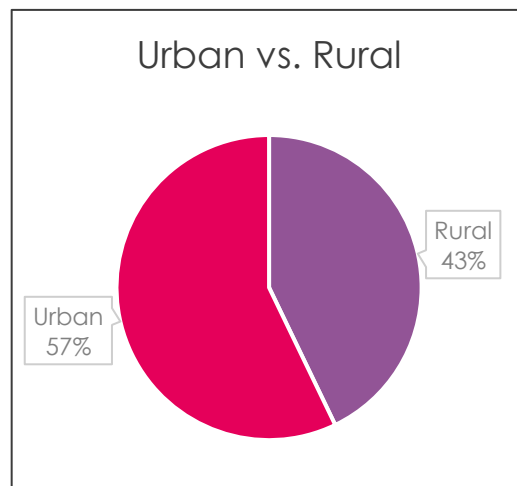
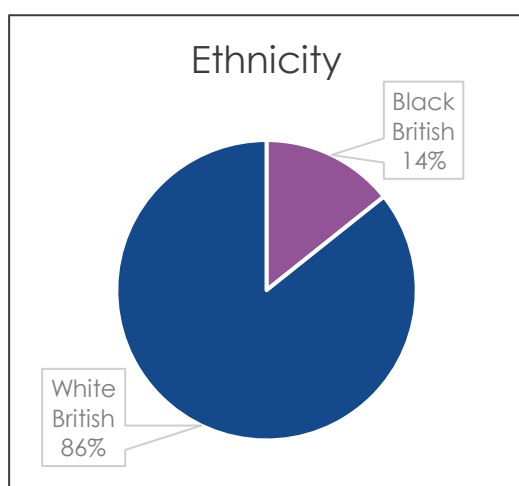
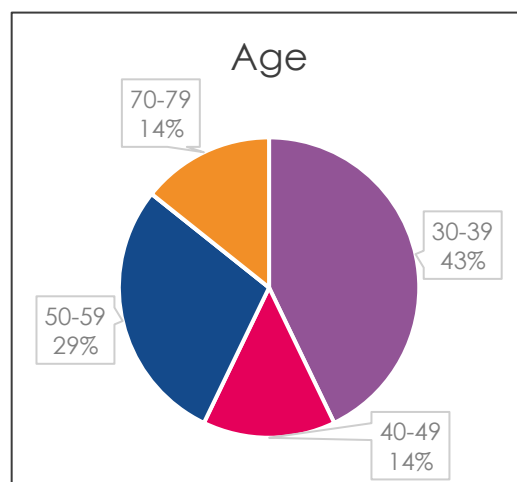
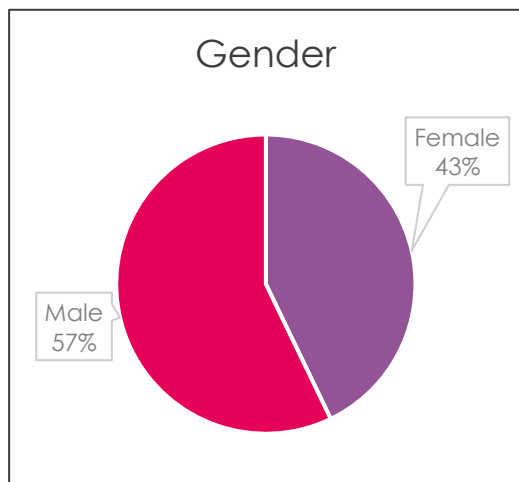
|               |   |   |   |   |   |   |
|---------------|---|---|---|---|---|---|
| Vulnerability | 1 | 1 | 2 | 2 | 1 | 1 |
|---------------|---|---|---|---|---|---|

## 2. Demographic data including water meters

### 2.1 Vulnerable audience (8 participants)

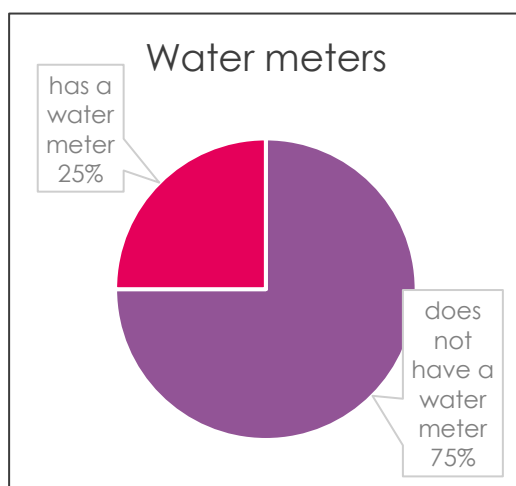
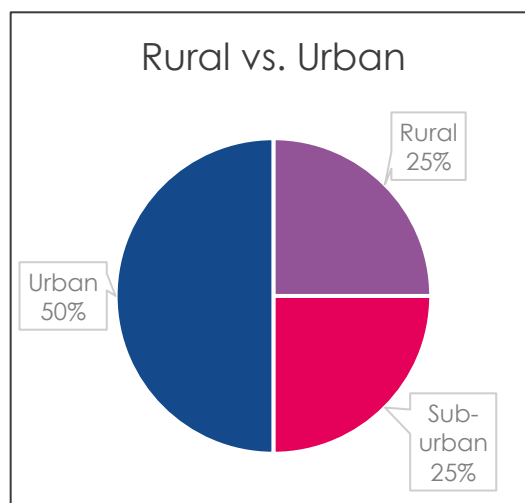
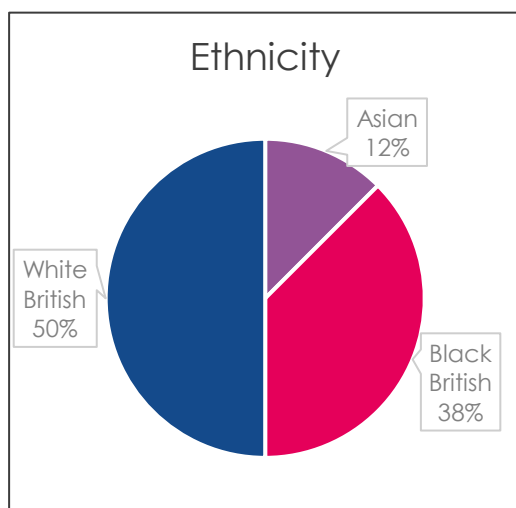
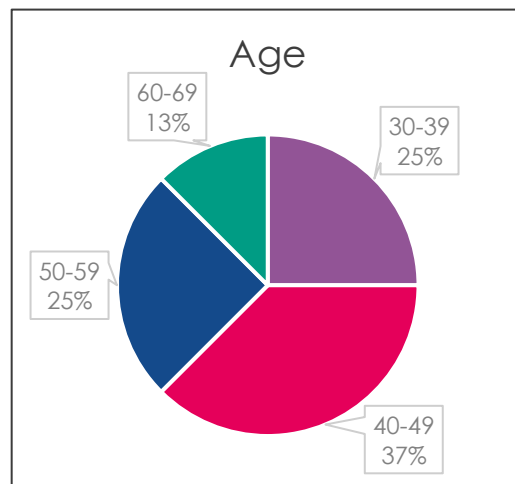
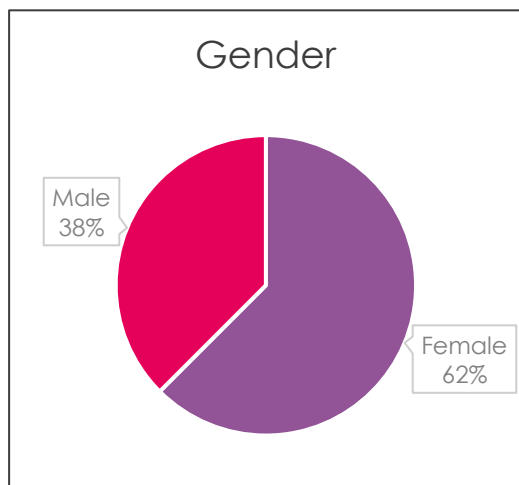


## 2.2 Bill affordability audience (7 participants)



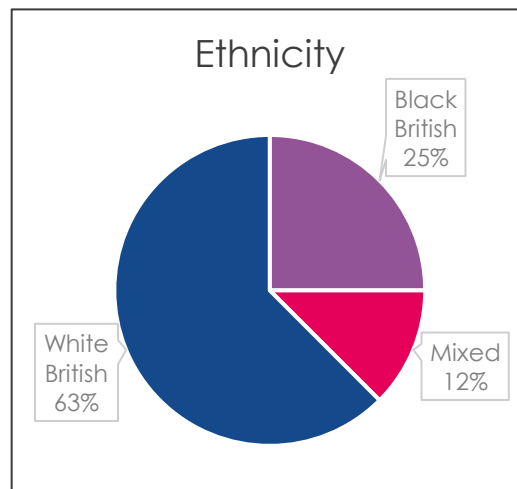
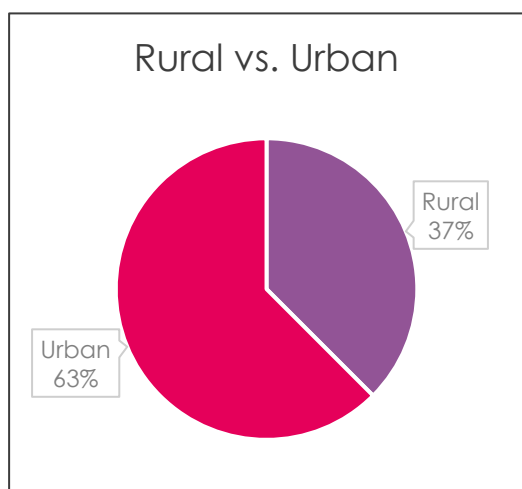
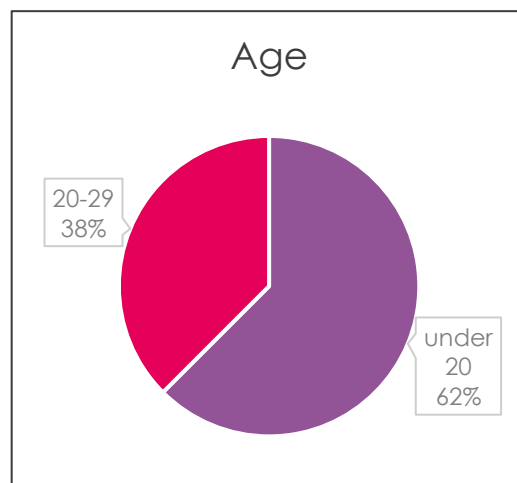
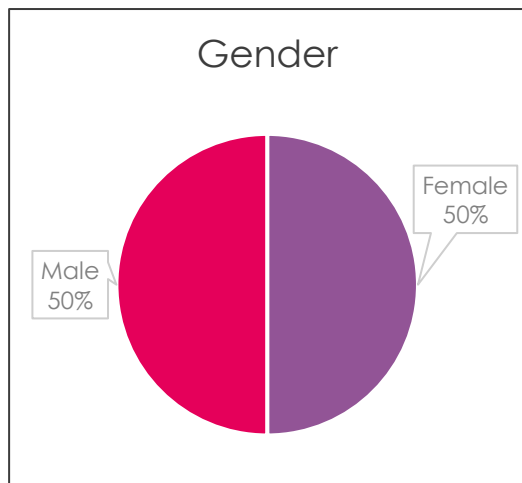


### 2.3 Mixed audience (8 participants)



## 2.4 Future customers audience (8 participants)

Water meter data was not included for this group, as they were not a bill payers for their property



### 3. Group prioritising activity from the focus groups

#### 3.1 Customers in financially vulnerable situations audience

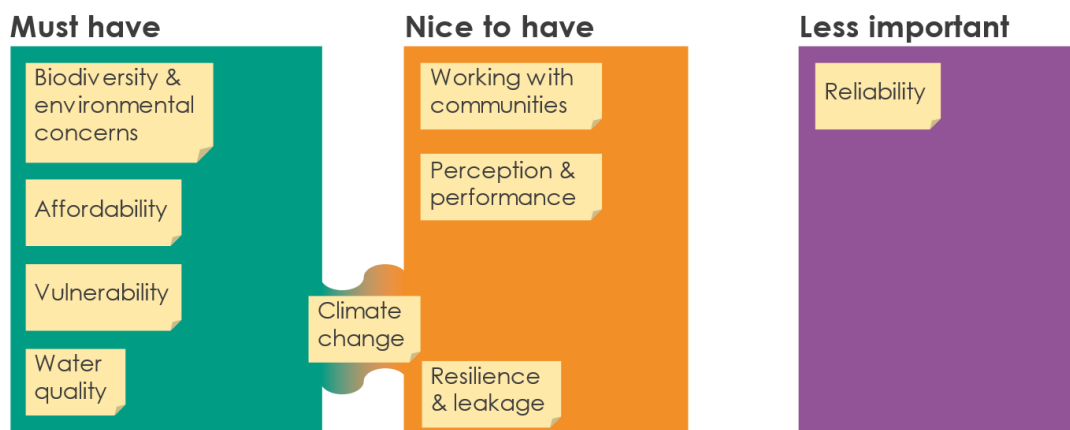
##### CIFVS audience



1

#### 3.2 Mixed audience

##### Mixed audience



2

### 3.3 Future customers audience

#### Future customers audience



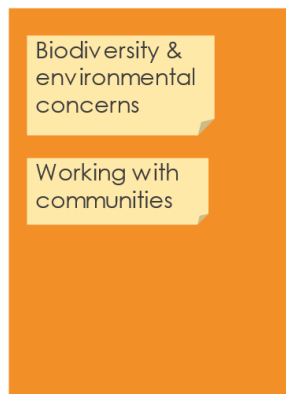
##### Must have



A teal rectangular graphic containing six yellow sticky-note style boxes with the following text:

- Water quality
- Vulnerability
- Affordability
- Climate change
- Perception & performance
- Resilience & leakage
- Reliability

##### Nice to have



An orange rectangular graphic containing two yellow sticky-note style boxes with the following text:

- Biodiversity & environmental concerns
- Working with communities

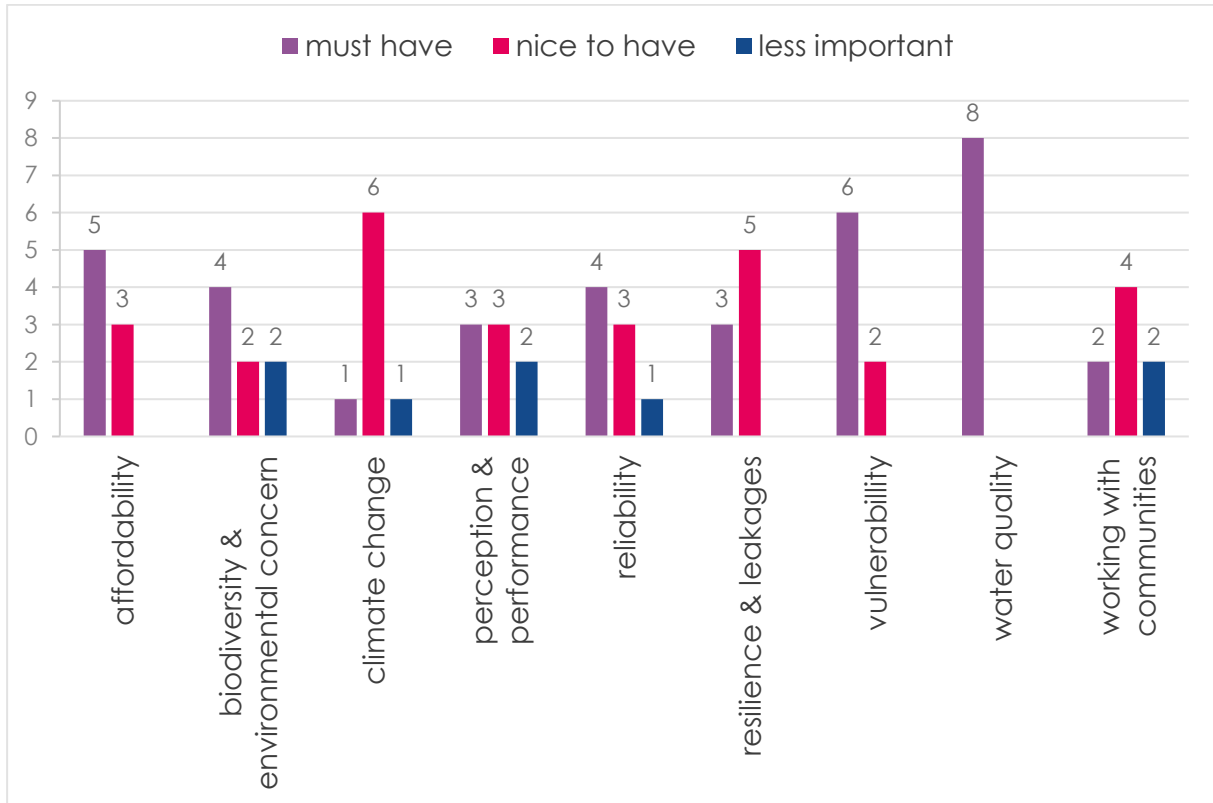
##### Less important



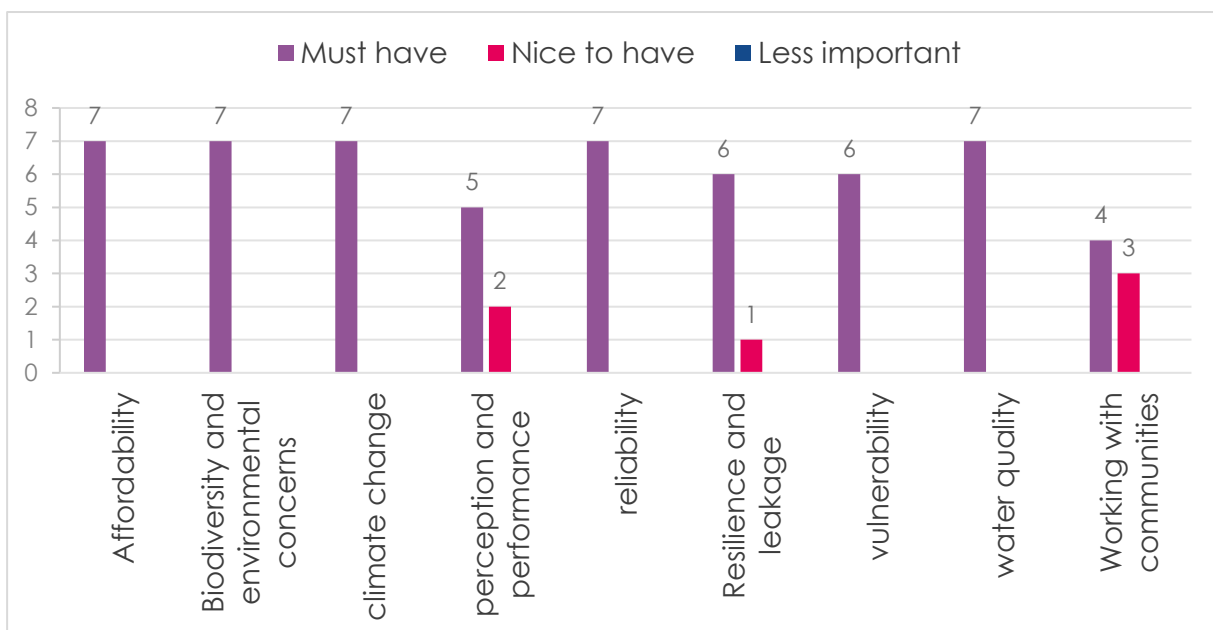
A solid purple rectangular graphic with no text.

## 4. Individual prioritising exercise

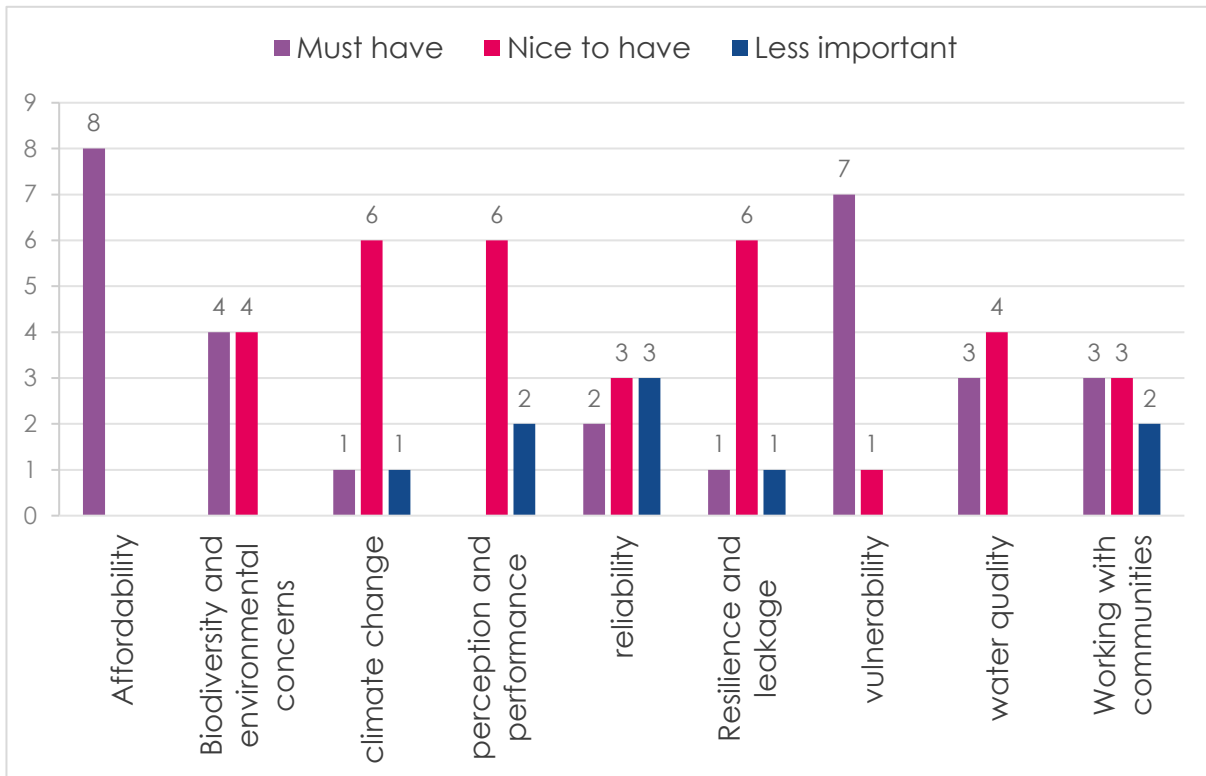
### 4.1 Vulnerable audience



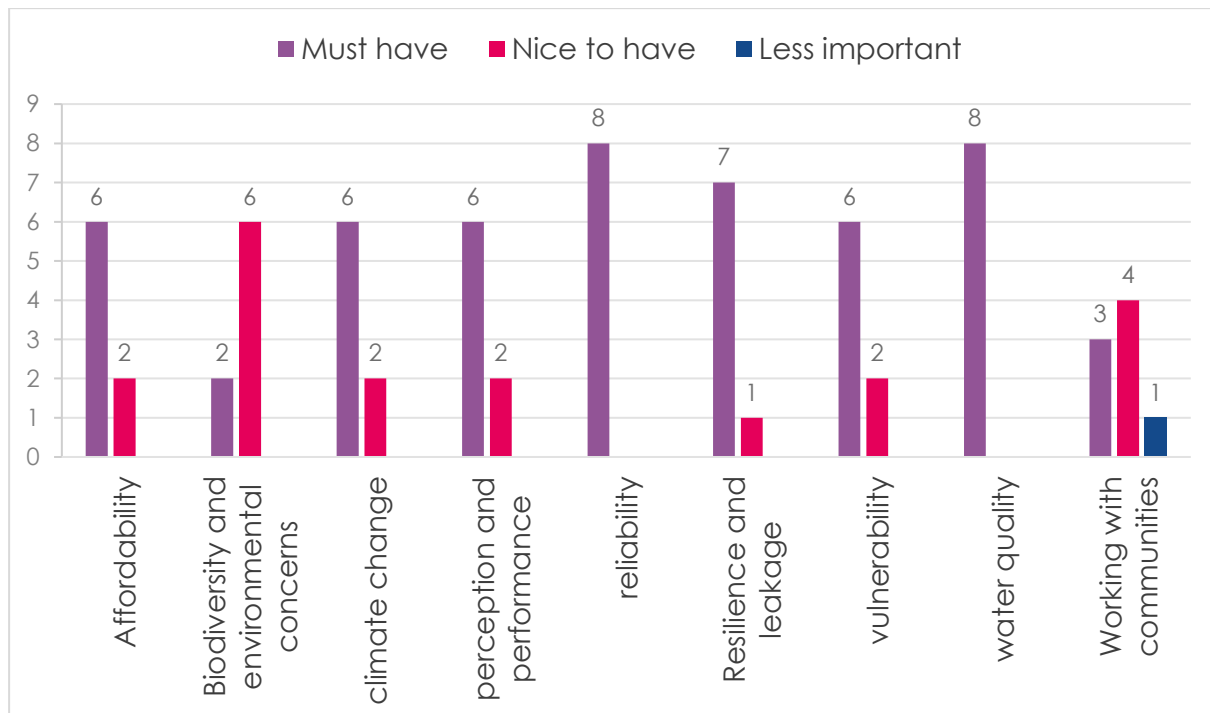
### 4.2 Affordability audience



### 4.3 Mixed audience



### 4.4 Future customers audience



## 5. Topic areas

### Affordability



We aim to make our bills **affordable to all** and offer a range of **social tariffs and support options**. We monitor the number of customers in ‘water poverty’ and target our vulnerable customer support and social tariffs as incomes change.

A household is in water poverty if they are spending more than 2% of their salary on water and sewerage bills.

1

### Perception and performance



We aim for excellent experiences for our customers and always provide an **effective response that builds trust**. We are committed to maintaining excellent performance and have set a **challenging aspiration** of being the top performing utility company in the UK.

2

## Reliability



**Keeping water flowing is an essential part of our role.** Supply interruptions are defined as when properties are without a continuous supply of water for 3 or more hours.

**Our target for interruptions to water supply in 2024/25 is 1.8 minutes per property, per year** – ambitious compared to our 2019/20 result of 12.2 minutes per property, per year!

3

## Resilience and leakage



**Managing our water resources is critical to what we do** and our area will face **increasing pressures** due to growth and climate change over the next 25 years.

We have made **significant reductions to leakage levels** and are now one of the **best performers in the industry**, with one of the lowest levels of leakage. **Our target is to reduce leakage by a further 15% by 2025.**

4



## Vulnerability



Our Priority Services Register (PSR) offers a range of **additional services to support customers who need them**. Over 20,000 (around 4.6%) of our customers are currently on our PSR. **COVID-19 and the cost-of-living crisis** is likely to increase the number of vulnerable customers who need our support.

5

## Water quality



We provide **high quality water** and use catchment management (the management of water that runs off the land into our water sources) to **maintain and improve** the raw water quality of our sources. This is where we work with **farmers and local communities** to modify their practices so that lower levels of nutrients and pesticides enter our raw water supplies.

6

## Biodiversity and environmental concerns



**Catchment management** (the management of water that runs off the land into our water sources) and the biodiversity index toolkit help us **manage our impact** on the environment.

Our biodiversity index tool takes a biodiversity score of a site we affect through our work, and ensures we improve the score once the work has finished.

Examples of our projects include reducing the **effects of our reservoirs** on downstream water bodies, and mitigating issues around **invasive species** on our sites.

7

## Working with communities



Our purpose is to have a **positive impact** on the lives of our customers, our communities, our colleagues, and on the environment beyond the delivery of pure and reliable water.

We carry out a number of projects as part of our **Social Contract**, such as working with local schools to **educate** future generations about the efficient use of resources to **minimise harm** and meet the **needs of future generations**.

8

## Climate change



We are **committed** to the challenge of achieving **Net Zero carbon (the balance between the amount of greenhouse gas produced and the amount removed from the atmosphere) by 2030** and have an ambition to not cause any greenhouse gas emissions through our activities to supply water to our customers.

9



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