

NWG People Panels

2: Personas and scenarios

Background

This was the second round of a series of four initial deliberative discussion sessions to be conducted online over Zoom. One session was conducted with each of the five panels on the following dates:

- **Monday 21st March: Employees**
- **Monday 21st March: Northumbrian**
- **Wednesday 23rd March: Essex**
- **Monday 28th March: Suffolk**
- **Thurs 31st March: Young**

Explain was responsible for the running of the events and for independent chairing and facilitation of two breakout room discussions per group. A NWG representative, [REDACTED], [REDACTED], attended all sessions and provided information on behalf of the company.

Purpose of the session

The event was designed to allow panellists to begin to think more about the water industry, Northumbrian Water (NW) and Essex & Suffolk Water (ESW), the wider roles they have, including the impact on different personas in different regions. Panellists were introduced to five personas, representing members of society, as well as four scenarios, which were developed by scientists and futurologists which depict four possible futures we could find ourselves in in 2050, depending on various factors.

The intention and aims of the session were shared with panellists, highlighting that the information gathered from these sessions will be used to inform the planning of the organisation's long-term strategy. The aim of this round was to encourage panellists to think about what factors could be involved in the long-term strategy of the company and increase panellists' awareness of how different personas are likely to be affected in different scenarios, and ultimately what this means for expectations around NW and ESW's service.

Attendee profile

Panel group	Total number of attendees	'Defining the Future'
Northumbrian	16 (2 new)	3
Employees	8	n/a
Essex	18 (9 new)	3
Suffolk	15 (3 new)	3
Young	13 (4 new)	2

Explain recruited more panellists prior to the commencement of the second session, and these new panellists were provided with briefing materials in advance of a 30-minute overview session they attended immediately prior to the second round. This provided new panellists with the opportunity to ask questions and be brought to a similar level of knowledge and understanding as the other panellists. Within the 'employees' group, there was a lower attendance of 8 panellists compared to the previous round's 11 panellists, however all other sessions had an uplift in the number of attendees for session two with the new recruits.

Feedback from chairs and moderators of the respective sessions indicated that the individuals in each group were engaged and interested in sharing their views. One employee panellist, however, noted that they wished to withdraw from the process.

The event feedback gathered from the closing polls, completed by panellists themselves, is shared at the end of this report.

Summary of findings

There were 90 minutes in each session, with roughly 40 minutes spent in breakout rooms, which were facilitated by Explain. Whilst all sessions provided an overview of the five personas and four scenarios, each group had the opportunity to 'deep dive' into two scenarios and two personas, which were rotated per session. This differed for the young panel who were given the one persona of 'young Chloe' to consider in all four scenarios. By allocating different personas to different panel groups, the probability of covering all personas and scenarios effectively increased.

What are the biggest changes in the last 25 years?

Different panellists in the Northumbrian panel had thought about this pre-task question in different ways. Some highlighted broader changes such as an increased population, development of land with more housing stock, and increased cost of living, whilst other panellists specifically mentioned things like 24-hour connectivity, the rise of technology companies and portable electronics, in addition to a movement towards a cashless society.

In the Northumbrian panel, it was noted that discussions of climate change are much more recent, and environmental changes are causing flooding and water pollution, but responses focussed on changes to technology and costs or finances. Technological advances were also the focus in the Employee group.

Similar sentiments were expressed across the following Essex, Suffolk and Young panels. Notably, older panellists tended to discuss costs and technology in the first part of the discussion, whereas the younger panellists focussed on the environment and climate change in this segment.

What are your initial thoughts on the five personas?

In both sessions, most panellists agreed that they could identify themselves, or someone they knew, with one or more than one of the personas. One attendee in the Northumbrian group was the exception to this, stating that they could not think of anybody that related to any of the personas.

Panellists were asked how they thought each persona would be affected in the different scenarios and specifically what this would mean for their expectations around water and their water services from Northumbrian Water or Essex & Suffolk Water.

Some Essex panellists highlighted that, although the personas resonated with them, they believed that the personas had missed representation, such as shared households of students, households of vulnerable individuals or those who receive benefits, or are unemployed. Members discussed the need for more variance across the personas, as only one persona was older and retired, but this did not represent elderly people who were not living a luxurious, retired lifestyle as they felt the persona ‘Richard’ was.

Subsequently, it had been explained to panellists that these personas had been selected based on population data relating the customers of Northumbrian Water and Essex & Suffolk Water.

Personas and scenarios split

To ensure all personas and scenarios were covered, the following table outlines which panels covered which personas and scenarios in their ‘deep dive’ discussions in breakout rooms. By doing so, we have been able to draw out commonly identified themes between three of the five panels for each scenario.

	John	Mary	Asha	Richard	Chloe
Prioritising the environment	Northumbrian	Essex	Northumbrian	Essex	Young
Tightening the purse strings	Northumbrian	Essex	Northumbrian	Essex	Young
Innovative future	Employee	Employee	Suffolk	Suffolk	Young
Climate chaos	Employee	Employee	Suffolk	Suffolk	Young

Prioritising the environment

What would be important to each persona in this scenario?

John – views of Northumbrian panel:

- **Green values:** Some panellists highlighted that John’s persona, having children, and societal norms would mean he would strive not to waste a supply of fresh water.
- *“He’d want to know that the water company was doing everything that they possibly... because he’s got kids, so he’ll want to know that his children are really looked after in the future”*
- **Metered tariff:** As John would be working from home three days a week, panellists discussed the reliance they felt he would have on water in the home and would subsequently face an increase in water expenses. Being on a metered tariff would help John regulate this.
- **Easy to read, digital meter:** One panellist discussed their water meter in a previous home being in a path in the middle of the street, where workmen had to read the meter as it was underground, and digits were small. Discussing this in relation to the rise in technology, many panellists agreed that it would be important to have access to a meter on a website or via an app to allow John to be aware of what his water usage is.
- *“Like a smart meter for the electricity, we could have one for the water”*
- *“If it’s metered, that would be a huge change, because your impact on the environment is only as good as the information you get to see what impact you’re having on the environment”*
- **Education:** Panellists discussed the need to educate young children in schools as well as adults on the reasons why water should be saved.
- *“Sometimes people don’t realise what you can do and why it’s important, so, I think the onus is on companies to say”*
- **Leisure habit restrictions:** One attendee discussed the impact of COVID and recent trends in buying treadmills, hot tubs, or outdoor showers for their homes and gardens. They thought that, if these trends were to continue in the future, it would be important for each person to have a supply of water, which would put a demand on NW unless incentives to cut down on water usage were put in place for those people.
- *“A lot of people have like the spa baths, Jacuzzi type things in the gardens. I think it just seems a waste of water and electricity... because you’re heating that water all the time”*

- **Partnership working and communication regarding appliances:** An attendee highlighted that they had been on a website to view washing machine EPC ratings and, though on AAA* washing machine was expensive, all the EPC ratings E, F and G were much cheaper. Panellists discussed that they were unaware who regulates the washing machine industry, or other industries which use water in the homes, and what NW could do about this – perhaps lobbying for change to rules around this to encourage purchase of efficient washing machines.

Asha – views of Northumbrian panel:

- **Keeping an eye on bills:** It was noted that there may be concern in Asha’s household around spending, and therefore a desire to see bills as low as possible.
 - **Metered tariff:** Being on a metered tariff was thought to be important to Asha due to having a young family and in a position of being furloughed in recent years, to help her keep her bills down.
 - **Easy to read, digital meter:** As Asha is in her early 30s, it was argued that Asha would be familiar with digital technologies so smart meters would likely be preferred and expected.
- *“You’re going to want a commitment that it’s not going to get any more expensive at that stage of life”*
- *“With only one person working maybe she might be in the category that she’s finding it hard to pay the water bill”*
- *“Funding might be a critical point mainly because if less people are able to afford to pay, or if you’re on Universal Credit, do you have to pay all £45 or whatever it is per month to Northumbrian Water or is that subsidised?”*

Chloe – views of Young panel:

- **Easy to read, digital meter:** As a young person, Chloe was considered likely to be familiar with digital technologies so would likely prefer and expect smart meters in the future.
- **Financial assistance and tracking costs:** Panellists highlighted that ‘green technologies’, such as electric cars, are viewed as more expensive and generally have higher upfront costs for energy efficient machinery. For this reason, financial assistance for Chloe, as a young person, might be needed through the water company encouraging government subsidies. Others noted that, as Chloe grew up in a lower income background, she’d likely retain these values and habits of caring about her money.

- *“With green energy, sometimes to run that way, it could be a bit more expensive”*
- *“She's came from a low-income area. She probably worked quite hard to get herself into a better financial situation, but I think it lasts a lifetime, how you've grown up and how much you've spent, and I think her priority will be the affordability”*
 - **Excellent customer service:** Particularly with technological advances and energy efficient machinery, and Chloe finding it difficult to navigate the boiler requirements, panellists thought Chloe would want support and guidance on how to use water efficiently in her home, as well as relating to any new low carbon technologies linked to this.
- *“Big priority is probably going to be renewables and using less energy to get clean water”*
 - **Transparency and reassurance, with green values as NWG’s responsibility:** Some panellists expressed that society, in 2050 in this scenario, really cares about the environment, and she would likely be conscious of her water use, but Chloe would consider it the responsibility of the company to be environmentally focussed. With regards to knowing that the money she’s using to pay her bill is going towards a cleaner production and be reassured the company is prioritising the environment.
- *“To be reassured that her money that she's paying for her water bill is going towards a cleaner production so they're not using fossil fuels”*
- *“She's probably willing to pay a bit more if she knew that it was better for the environment”*

Richard – views of Essex panel:

- **Easy to read, digital meter:** Richard would want to track his water and having an easy-to-read meter would help him feel in control and be more motivated to use less water.
- *“The meters can be made in a way to have a household goal so we can track it how far we are reaching that goal, and how much we can save until that month”*
 - **Forecasting and warning:** One panellist theorised that the company could gather information on the number of adults and children living in the house, and the amount of water they expect the individuals living there should use collectively over each month.
- *“If it goes above that, steps should be taken on behalf of the company to make the family aware if they go overboard, so they should try to make some economies by doing so and so”*

Mary – views of Essex panel:

- **Green values:** Mary would be interested in how the water company is prioritising the environment through, for instance, their transport methods and accessibility.
- *“Mary will expect that there will be green solutions to the use of water in our household as well; and whether that’s collection from rainwater and using it and the water company being active and supporting that for all households”*
- **Best maintenance for reliable supply:** Mary would want reassurance that there’s consistent repair and maintenance of assets to make sure as little water as possible is lost through leakages.
- *“Consistency of repairing and making sure that we’re losing as little water as possible through water leakage”*
- **Costs:** As she’s taken advantage of grants, it suggests that Mary is aware of the environment and making her best efforts. However, panellists agreed that costs would be less of a concern for Mary compared to other personas in this scenario.
- **High expectations:** As a society, panellists expected individuals to be demanding and thought might be just as demanding, if not more, in 2050.

What priorities do NWG need to consider for a long-term strategy aligned to prioritising the environment?

Development of easy-to-read, digital smart meters

Continue to reassure customers that NWG are committed to green values and take responsibility for making environmentally-conscious choices

Offer additional financial support for customers who may struggle with the up-front costs of ‘green technologies’

Continuation of educating customers on how to best adopt water-saving behaviours, for instance by helping customers understand how to navigate new energy-efficient household technologies linked to water use

Tightening the purse strings

What would be important to the personas in each scenario?

John – views of Northumbrian panel:

- **Saving water to save money:** If on a metered tariff, this was thought to be a way that could offer water bill stability to John, who has a family and children to provide financial security for.
- *“He’d want that predictability of the prices are not going to increase too much too rapidly”*
- *“One of the biggest factors is that the cost of the water doesn’t rise too excessively and gives more water poverty to people”*
- **Better education on how to save money:** Some attendees discussed that education on how to save water would be needed if costs need to be cut, as some people might not know how to do this, especially if they’re not used to being unemployed at home or working from home.
- **Green values:** As John votes for the green pivot in this scenario, panellists emphasised that he would want Northumbrian Water to take responsibility for being green too.
- *“John would want to maintain that push towards us being more carbon neutral or more green”*
- **Leisure facilities:** Panellists noted that John has children and may want an environmentally friendly leisure area to take the children, where water is recycled in a recreational way.
- *“We’re always looking for something to do with our children. They could have a leisure aspect to the service where there were people go in and enjoy facilities”*

Asha – views of Northumbrian panel:

- **Saving water to save money:** Asha, who is described as building savings and planning on buying a house, would consider water to be very valuable, because water is money in this scenario. Being on a metered tariff could offer stability to Asha, who has a family and young child to provide financial security for.
- **Better education on how to save money:** Some panellists discussed that education on how to save water would be needed if costs need to be cut, as some people might not know how to do this, especially if they’re not used to being unemployed at home or working from home.

- *“She'll be looking to keep her bills, especially the way that they've been as low as possible”*
 - **Funding assistance for vulnerable:** Keeping costs down was identified as a priority. Panellists discussed the benefit of people receiving subsidies from the Government if they can't pay water rates. Asha is described as going to food banks so assistance from NWG for the most vulnerable would be a way they could support, for example through financial support schemes.

Chloe – views of Young panel:

- **Better education on how to save money:** Bills are taking up most of Chloe's spending, so she will want to have as much information, guidance and support from NWG to make sure that she is saving as much water as she can, in order to reduce her bills.
- *“Why should she be paying, say, fifty pounds a month if she's not actually using that water? She'd want to be saving that”*
 - **Excellent customer service:** Due to the amount of money she's spending on bills, she would expect customer service to be excellent
- *“If she has a problem, she'd want that to be solved, because she's spending most of her money on the bills”*
 - **Easy to read, digital meter and company tracking:** Chloe was thought to want to track her water usage, but also have support from NWG to track her water usage and give warnings if she is coming close to her limit; panellists likened this to how some phone contracts work.
- *“She might expect to be given a smart meter or something, because I think some energy companies have been doing that free of charge for existing customers”*
 - **Community support:** Chloe might want NWG to support those who struggle to pay their bills, through unemployment schemes, for example, or by offering more jobs to those in local areas.
- *“Obviously, affordability is the very clear thing that she's going to need, however, perhaps just giving back to the community and creating those local jobs”*
- *“Perhaps she'd want Northumbrian Water to provide a scheme to help people who are unemployed and perhaps can't afford their bills”*

Richard – views of Essex panel:

- **Saving water:** Due to Richard’s green values, panellists discussed how he would like information on how to save more water. This might include recycling and reusing water, and on NWG’s role in supporting recycling and reusing water schemes as well as reducing leakage.
- *“If there's ways to recycle their water, are there ways to perhaps take advantage of water from water vats and things like that”*
- *“He'd be aware of the continuing problem of water leaks”*
- **Technology advances:** As technology will improve, Richard may invest in adopting some of the water efficient technologies around his home, for example if they create pieces of equipment in the future which may be expensive, but Richard would be able to afford.
- *“For example, when you have a mixer tap and you want water that is a certain temperature, you have to let out some water to flow down and it's a waste. Maybe the same way we have temperature gauges where we can set a certain temperature in our house, we could do that with our taps, so the water comes out straight away at a certain temperature that you want”*
- **Easy to read, water meter tracker:** Though Richard is comfortable, monitoring water usage in your own home is thought to focus the mind, one panellist suggested.
- *“As I said before, a water meter inside the home is how you can use less water”*

Mary – views of Essex panel:

- **Easy to read, digital meter and company tracking:** The ability to check her usage will offer Mary more control over paying for what she consumes and not more. One panellist suggested a warning for being close to their limit, as a reminder for Mary to cut down, for example, if she’s watering the garden when she’s at her personal water limit.
- *“We could even have Big Brother watching us, couldn't we? ‘You've used too much water for that bath,’ or, ‘You're sprinkling your grass when you shouldn't be’”*
- **Worrying about restrictions, shortages, or hygiene levels of water:** Mary might also want to ensure that, even if she’s conscious of her water usage, that the water supply is safe, well-maintained, and won’t be restricted.
- *“If there is a shortage of water, then the desalination plants will have to kick in and we'll have to take the water from the oceans”*

- *“They’ve met the carbon footprint target, but have they been able to maintain the quality of supply?”*
 - **Cut back on costs:** Though Mary might be comfortable in her current situation, she might be thinking about having higher costs due to the uncertainty of the future, so trying to cut back on costs where she can.
 - One panellist highlighted that Mary wouldn’t likely be loyal to NWG in this scenario where customers can shop around, and would be seeking the lowest bill possible in the market.
- *“There is no loyalty now, to companies, and even with the water companies, by 2050 people will be shopping around”*
- *“You need to be confident that once you do that economy in your own household, that is reflected in the bill that you are receiving”*
- *“If the prices increase, as I said, she might not be able to pay those bills... thinking of the uncertainty of the future, because as we know, no job is permanent and secured forever”*

What priorities do NWG need to consider for a long-term strategy aligned to a higher cost of living scenario?

Low costs would be paramount to keep customers from ‘shopping around’ in this scenario and going with another supplier

Offer community support through unemployment schemes, for example, and offering jobs in local areas for those who are in need

Offer financial support for the financially vulnerable, possibly with partnership of government subsidies

Continuation of educating customers through development of educational guides for how they can best save water, and therefore save money, in their households

An innovative future

What would be important each persona in this scenario?

John – views of Employee panel:

- **Cautious with finances:** John would be more likely to make sure he and his family had the best price on their water tariff by shopping around. It is likely that John would be looking for ways to save money if, in 2050, his family feels an impact.
- *“With the smart meter he can plan their outcomes better... he's into technology he's going to be better at looking at things and planning things”*
- *“He still has the same fears because he can gain millions and lose millions. He'll still think the same about his family, his finance, and is probably managing his money better now he has more”*
 - **Uninterrupted service:** Panellists thought that John would want to make sure that the service wasn't interrupted, particularly due to having children.
 - **Environmental priority:** Alongside an innovative future, it's expected John would expect providers to stick to their environmental commitments whilst still being cost effective. Though the public care about the environment, panellists agreed, it is not feasible he makes changes which are impactful.
- *“The future looks bright, but he wants to put the same things in to protect his future and hopefully their children's future with water, technology, and everything”*
- *“He has a bigger house to look after, hasn't he? In a more rural area where water supplies might be more impacted with a 2.4 rise in temperature in global warming, he might have more to think about and more to worry about in 2050”*
 - **Excellent customer service:** Overall, customer expectations would remain high and he would expect NWG and the water service to be resilient.
- *“I want to pick the phone up hopefully within three rings to get to speak to somebody, not a machine, and I'd like somebody to come out today because I have a problem”*
- *“If my ceiling's coming down, I don't want to wait two, three hours for somebody to come... I want the best service”*

Mary - views of Employee panel:

- **Cautious with finances:** Mary is unlikely to be happy with the rising costs but would be able to pay it due to their personal circumstances of being employed and not in a financially vulnerable position. She was expected to want a metered supply to help track her usage and spend.
- *“She’s going to want... a meter reading that she can clearly see so that she knows she’s not being billed estimated charges, she’s actually being billed correctly”*
- *“Customers are of the opinion now that they should only being billed for what they’re using and that estimated charges are not a way forward anymore”*
- *“Everybody by that stage would have to be on some sort of meter, and a Smart Meter too so you can see exactly what you’re going to save”*
- **Uninterrupted service:** Panellists thought that Mary would want to make sure that the service wasn’t interrupted, as she would want value for money.
- **Environmental priority:** Mary would expect providers to stick to their environmental commitments. Though the public care about the environment, panellists agreed, Mary is unlikely to make changes herself which are impactful therefore will look to service providers.
- *“They want clean bathing water, they want no pollution, zero pollution by then”*
- **Prompt responses customer service:** Overall, customer expectations would remain high, and Mary might expect to deal with one point of contact, and for example may expect new channels such as digital chat.
- *“She’s going to want a bill produced in a timely fashion”*
- *“I’d much rather do a web chat or something like that as you seem to get in quicker”*
- *“They’re both going to go for a good, whizzy website that shows them where the problems were if they wanted an immediate contact. Rather than somewhere where you wanted to pick up the phone and speak to somebody”*

Chloe - views of Young panel

- **Debated concern for costs:** As Chloe has lots of disposable income, some panellists thought that this would mean she won't be as bothered about tracking her water use. However, other panellists stated that, as Chloe would be paying her own bills, she's more likely to be mindful of the cost of bills. This is particularly the case due to Chloe working from home several days each week, so being more heavily reliant on her household water supply.
- *"If you're paying the bills then you worry about how much money you use more than, I believe"*
- *"If you've got that disposable income I would say if you've got the means to pay for it and you're not really noticing it go out as much as if you were counting your money"*
- *"If you're working from home three days out of five, you're going to be more cautious aren't you"*
- **No loyalty to NWG:** Due to the competitive climate, panellists agreed that Chloe wouldn't be loyal to the company and would be likely to switch for better customer service.
- *"If the customer service and reliability isn't there then people will switch"*
- **Excellent customer service:** Notably, the Young panel highlighted that reliability is necessary and, particularly as Chloe is described as moving house, it would be important to have excellent communication, updates, and explanations surrounding her water bill when moving property during the House Move journey.
- *"Having that smooth transition to adapt to people's life changes in terms of the water bill in this case, moving from a terraced house to a flat in the city centre, making sure that transition is smooth in terms of the water bill and making sure that it reflects the size of the house"*
- **Technology advances:** As Chloe has grown up with the rise of technology, Chloe will be familiar with this and would likely be interested in new technologies.

Richard - views of Suffolk panel

- **Excellent customer service:** Richard will expect excellent customer service, or he'll move to another water provider. With this, panellists discussed the high expectations of customers in this scenario when it's a competitive market.
- *"What he'll want is an A-plus service or he'll go somewhere else. It's as simple as that. If he can't be provided with the service, he wants at a price he wants, he'll just take his money elsewhere"*

- *“If there’s this free market now, that’s when customer service has really got to work hard to keep him on side otherwise, he’ll be off to somebody else”*
 - **Resilient supply of water:** Due to choosing NWG as his water provider, Richard will expect the company to be able to provide water on tap, whenever Richard would like it.
 - **Easy to manage bills overseas via various communications:** As Richard may spend much of his time overseas, panellists discussed how helpful it would be for Richard if he was able to manage his bills overseas through various communication methods.

- *“For him to be able to manage his bills from Spain... whether it be online, if it’s a number he can call that doesn’t cost – just for him to be able to speak to someone and not a chat bot. He might want to discuss a bill that’s come in or something he doesn’t agree with, whether it be an estimated – it could just be something that he wants to speak to someone about, just to get a clearer understanding”*
 - **Lack of concern for climate change:** Panellists highlighted that Richard doesn’t likely care about climate change as he has a house in Spain and would likely fly there regularly, therefore probably less likely to worry about his carbon footprint.
 - **Lack of concern for vulnerable:** Richard has made money by investing in technology and panellists regarded this as being indicative that he wouldn’t be mindful of vulnerable people or their needs, as his money is being spent on luxuries.

- *“He’s made money investing in technology... he’s living in a house that, well, heaven knows how much that cost him. He’s got another house in Spain. He’s flying backwards and forwards... I don’t think he cares about [wider issues]”*

Asha - views of Suffolk panel

- **Concern for costs:** Finance was considered likely to be huge issue for Asha and her family, with her job being precarious and her husband recently being out of a job. In the competitive market, Asha will likely stay with the provider that is offering the most financial assistance and reassurance.
 - **Billing flexibility:** Following on from the concern of costs, Asha would deem it important to have flexibility in paying their bills but with a guarantee of their supply.
- *“They might find that one month they’ve got more disposable income than they might have the following month. So, maybe flexibility in possibly being able to pay more when she can but then maybe having a couple of payment holidays over two or three months if she’s struggling”*

- **Resilient supply of water:** Asha has a young child, so they will need to ensure the water supply is continuous to take care of the three-year old's physical wellbeing.
- **Water safety:** Similarly, knowing that the tap water is safe to drink will also be highly important to Asha, as well as knowing there are no chemicals in it. Due to their low income, it's unlikely that Asha will be able to afford to drink bottled water.
- *"She's obviously still going to need a very reliable source of water for her three-year old because it's going to be baths and taking care of them and their physical wellbeing"*
- **Easy to read, digital meter and company tracking:** Asha would find it important to monitor usage and, as she's young (and therefore considered tech savvy), it was thought it would be good for this to be on a phone or portable digital device so she can check how much water she's used each month.
- *"If it maybe sends you an alert, then you're prompted to recognise when those changes are coming"*
- **Various communication methods:** Panellists, in relation to discussing customer service, further mentioned the preference of various communication methods such as via a phone app, an instant chat, a video call, or app alerts.
- *"An app on the phone that could show her how much she's used so far in the month. Then if she wants to talk to someone, it could be a chat instant to somebody or a video call. So, say if it's the tenth and she's used nearly all her usage, she can slow down"*

What priorities do NWG need to consider for a long-term strategy aligning to an innovative future?

Consider offering billing flexibility, such as payment holidays, to support those who may struggle some months

Develop easy-to-read, digital smart meters for individuals to track usage and be conscious of supply

Provide further reassurance that water is safe, clean, and reliable

Provide excellent customer service by offering various communication methods, including overseas payments, via phone app, free phone-calls to humans (not bots), and instant digital chats

Climate chaos

What would be important each persona in this scenario?

John – views of Employees panel:

- **Affordability:** As John has children, he would want to make sure he can provide for them.
- *“He’s more concerned about his financial future”*
- *“Making his bills affordable so that it’s not a massive noose round his neck that he has to work extra or has to do overtime in order to pay his bills”*
- **Expectation of NWG as environmentally conscious:** John would want Northumbrian Water to be more environmentally conscious but would not be willing to pay higher costs for this.
- *“He’ll not be wanting to pay and yes, he probably will be blaming us, blaming big companies who haven’t done what they should have done in the last twenty-five years”*
- *“You could be harvesting rainwater to flush your toilets... you see those toilets with hand basins at the top of the cistern where you wash your hands then that water actually flushes the toilet”*
- **Education:** Education would be important to John over the next twenty-five years, to show that NWG have been doing their utmost ahead of this climate chaos.
- *“We need to educate our customers more to stop this from actually happening in the future so that it just never gets to this predicament where rivers are low and wildlife disappears”*
- **Concerns for children:** As a father, John will be thinking about the impact that the climate chaos will have on his children’s physical and mental health.
- *“The environment is being affected massively by climate change and the water level’s going down and there’s lack of wildlife, he’s thinking ‘what are their futures going to be like?’”*
- *“Will they get jobs? Will there be anywhere nice for them to go on a sunny afternoon? I live in the edge of the country... they’re starting to build houses where you had fields full of wildlife”*
- *“He’s going to want streams and rivers near his home, he wants to take his children to the beach, and he wants them to swim in water where he knows it’s safe”*
- **Conscious of usage over time with monitoring usage:** Panellists viewed the general public as being unaware of what happens behind the scenes of water services and didn’t anticipate that changing. They also discussed how people are likely to become more conscious of their usage over time, particularly with the use of a water meter to monitor their usage.

- **Processes to combat water shortages:** Some attendees discussed the “national grid of water” and considered whether there is the capacity to pump water from larger rivers to smaller rivers or areas with drought or water stress, to combat water shortages.
- Other thoughts included ensuring most people have a water meter by 2050 by making it compulsory.
- *“If he sees water leaks running in the streets for days, weeks on end, he’s not going to be very happy if there’s a water shortage”*

Mary - views of Employees panel:

- **Expectation of being environmentally conscious:** Mary would want Essex & Suffolk Water to be more environmentally conscious and may be willing to pay slightly more for the reassurance that transport methods of water are environmentally conscious, for example.
- *“As a company I think by then we’ll be encouraging rainwater harvesting as an alternative for people, so let’s hope we’re promoting it then which will protect our stocks”*
- **Conscious of usage over time with monitoring usage:** Mary would be likely to become more conscious of their usage over time, particularly with the use of a water meter to monitor their usage. However, Mary would not feel financial pressure to do so and is more likely to do this for environmental reasons.
- *“She’s maybe a little bit more aware of not putting the sprinkler on in her detached garden of her house she’s got in Essex”*
- *“I do think there’s been a massive shift in the last twenty-five years to people being much more resourceful and aware”*
- *“I think people are only going to get better at reporting to us people who are abstracting or legally wasting the water”*
- **Uninterrupted supply of water:** Other panellists thought, whilst Mary would expect NWG to be conscious, Mary herself would want a constant supply of water at any notice.
- *“She wants to turn that tap on and get water 24/7, not to be told that you can only use it between the hours of five and six. She wants a service and she’s paying top dollar for it”*
- *“If you don’t put a price on what you’re using then people will just leave the taps running or have two baths a day... if I’m on open supply it’s not affecting anybody apart from the company”*

Chloe - views of Young panel

- **Excellent customer service:** Panellists considered this to be most important.
- *“Stay in touch with the customers, put the customers first and make sure they are building the foundation with their customers, so their customers have faith”*
 - **Reassurance of safe, clean, reliable supply:** Panellists agreed that, given the uncertainty of the world around them, and the possibility of water being contaminated in a climate chaos scenario, they would want reassurance that the standard of water quality and supply reliability doesn't slip. Some panellists referred to the recent pandemic and, due to the uncertainty, some chose to store items to give them reassurance that they had a safety net. Enforcement to prevent households from storing too much, and providing a guarantee to customers, would help reassure them.
- *“Giving a guarantee that they're going to do their utmost to make sure that their water supplies, giving the certainty and hope through the words that they're using and giving them that little bit of faith”*
- *“There's going to be demand for prices to remain low, but at the same time we don't want to risk having poor water supplies and contaminating various things because legislation's not there”*
- *“I don't think she'll be as bothered how it gets to her, just as long as she's getting what she's paying for”*
 - **Partnership working:** Chloe may expect the water company to be working in partnership with other organisations, local councils, or the government to reach climate targets together.
- *“Maybe working in conjunction with maybe other companies or the local council or government”*
- *“The UK hasn't achieved its carbon footprint target, she feels as though it's Northumbrian Water's responsibility to not cause any more issues”*
 - **Conscious of personal water usage:** Panellists thought she is likely to already be conscious of her usage to save money where she can, because of the high unemployment rates. Affordability is likely to be the most important thing, and some panellists highlighted that, if she's in a bad place financially, then she may consider moving out of the area to find somewhere cheaper.
- *“If unemployment is very high, you're going to want to save a bit of money as a 'just in case'. So, you don't want to be spending ridiculous amounts on your water bill”*

- **Penalties / restrictions for higher usage households:** Like the hosepipe water ban which happened 10-15 years ago, one panellist thought that this scenario would lead to penalties and restrictions, which would be appreciated by Chloe as this would mean that others would have their water for leisure activities restricted and would ensure Chloe's water supply is protected.
- *"It's highly likely that we will need to have some type of enforcement of how much water we use"*
- **Wider community support:** Panellists thought that, as Chloe came from a lower income background, it's likely that she would advocate wider community help, including support for the vulnerable
- *"Perhaps notable changes and things that they can show measurably that they're changing to try and help the communities they work in"*

Richard - views of Suffolk panel

- **Continuity of reliable service:** Panellists thought the provision of efficient, clean, cost-effective, resilient, and uninterrupted service would be viewed as the most essential aspect.
- *"You must concentrate on your core business, which is to deliver effective water supply at an effective price, and not be diverted by other things"*
- **Support and guidance from ESW:** Richard would want to be confident that Essex & Suffolk Water would be there to help him through personal home visits to show how to minimise water waste. It was highlighted that, due to Richard being an older persona, he may start to need more help to keep up with the changes and this might cause him concern or worry. It would therefore be important that ESW were transparent with Richard and provided explanations and reasons for his bills.
- *"When they get to a certain age, and need more help, even doing, like a quarterly Zoom chat or something, to show people, like a Live Chat, to show how to save money, or ways they can for example, retain water in the garden... little tips and hints"*
- *"You're going to be very worried about how you can keep up with the changes that are happening around you, so that you can manage your life"*

Asha - views of Suffolk panel

- **Affordability and financial help:** Panellists considered high costs to be the factor that would affect Asha the most, so Asha would want support in different ways. For instance, Northumbrian Water could employ a third party to be able to help people like Asha, educate her on how to save money on bills, and employ more staff for personalised home visits.
 - *“Maybe employ a third party to be able to help people like Asha”*
 - *“She’s going to have absolutely no extra money at all”*
- **Monitoring usage:** Asha would need to be able to monitor her usage through an easy-to-read meter. Panellists thought that water meters should become compulsory before 2050 which would provide an element of stability to Asha.
 - *“She would probably have to ration her usage of water and electricity”*
- **Job opportunities:** Asha would want the wider community supported by ESW offering job opportunities for individuals.
 - *“They could employ people to go round and show people ‘water saving ways’ in their home”*
- **Education in schools:** As Asha has a young child, she may be invested in encouraging the children in schools to have more information about climate change, especially as the child would need to also adopt these behaviours in the house.
 - *“When you send the bill, put something on the back of the bill, something for the kids to pick up and read... kids obviously talk about climate change quite a lot in schools, but... I don’t think they focus so much on water”*
- **Reassurance of safe, clean, reliable supply:** Asha has a young child and family, so Asha would want to be reassured that the supply of water would be reliable, safe, and clean.

What priorities do NWG need to consider for a long-term strategy aligning to the climate chaos scenario?

Keeping costs low, particularly for vulnerable customers, and introducing penalties or restrictions for higher usage households.

Provide support to the community through offering jobs and educating households via home visits

Develop easy-to-read, digital smart meters for individuals to track usage, and stability of metered payments

Reassurance that water is safe, clean and reliable, given the uncertainty of the climate

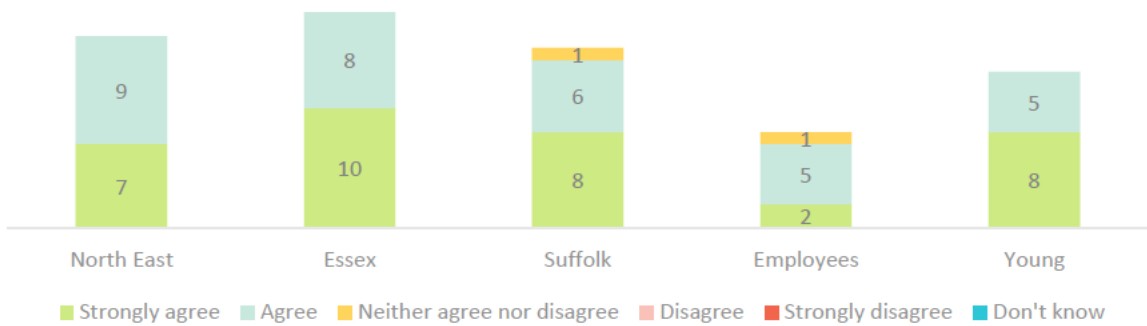
Provide excellent customer service by offering various communication methods, including overseas payments, via phone app, free phone-calls to humans (not bots), and instant chats

2: Event feedback

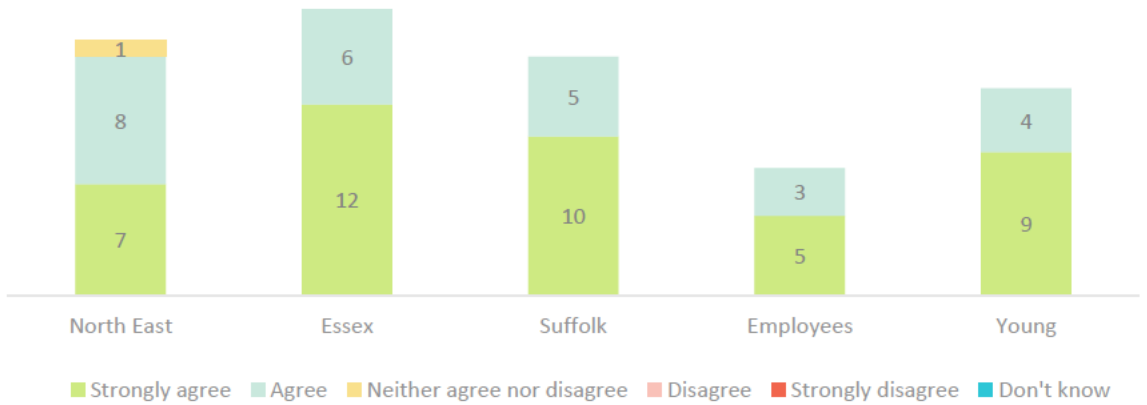
Poll feedback on session

All panellists voted on a poll, containing four questions, at the end of the session. Panellists were asked to use a rating of 1 'strongly agree' to 5 'strongly disagree' to show how they felt about each statement. The results are as follows and generally demonstrate a positive experience for attendees:

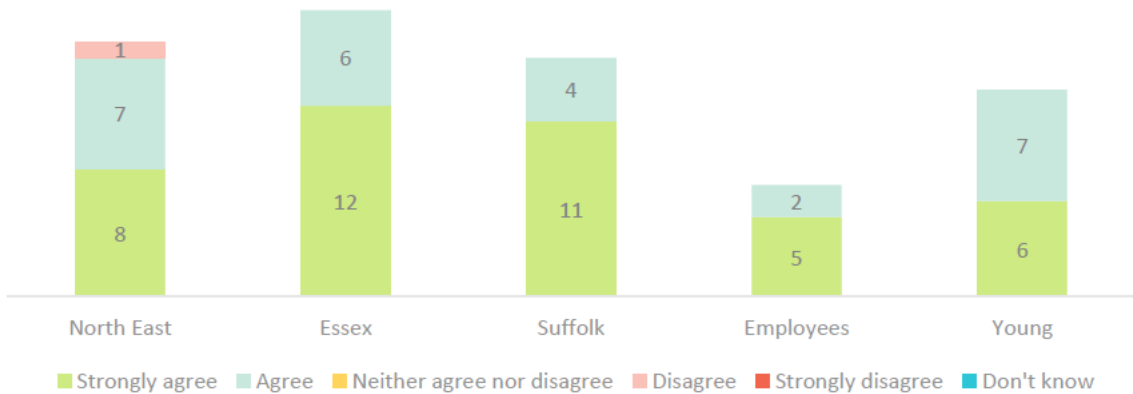
The information provided throughout was clear and easy to understand



I understood the purpose of the session

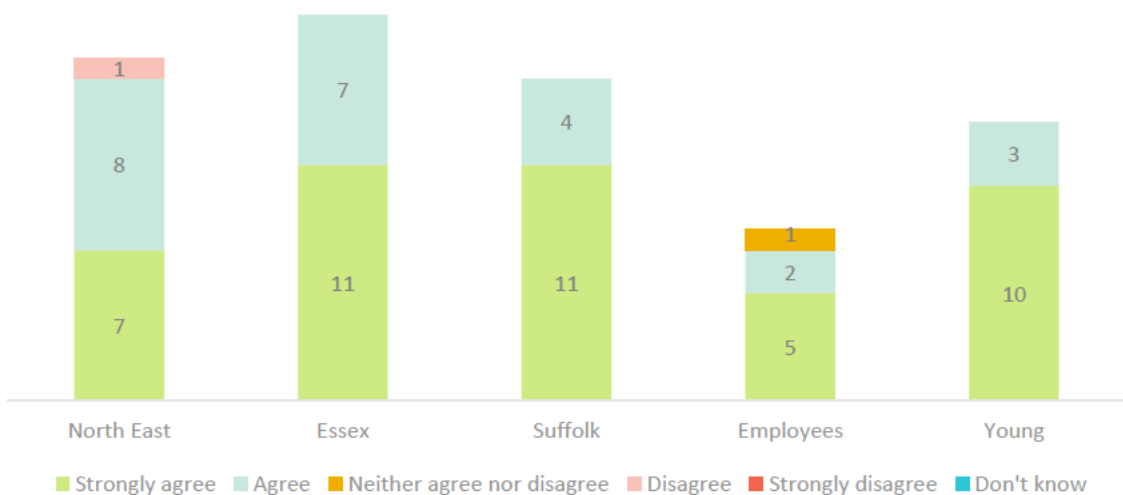


The discussion was interesting



Compared to the first round’s results, there was an increase from five to seven Northumbrian panellists who ‘strongly agreed’ that they were satisfied with the session they participated. One attendee of the Northumbrian panel disagreed with the statements ‘the discussion was interesting’ and ‘overall I was satisfied with the session I participated in. This attendee was one of the new recruits and had attended the earlier overview of session one in the immediate half hour before session two. When following up with incentives, Explain checked how this panellist found the session and was provided with the response that they did enjoy it but they had expected the session to be different, which could explain the results.

Overall, I was satisfied with the session I participated in



NORTHUMBRIAN
WATER *living water*

Slide Pack

PRE-WORK

BEFORE YOU COME TO THE SESSION



- Talk to you about what life will be like in 2050
- This will help inform Northumbrian Water's long term strategy, which we will talk about in future sessions
- To help prepare can you think about:
 - What life was like 25 years ago – what are the biggest changes you have seen yourself, or are aware of, over that time?
 - Where will you or your family be in 25 years time – think about life stage, location, ambitions, cost of living, the environment, technology, what kind of world you want it to be

NORTHUMBRIAN
WATER *living water*

Welcome to the
Northumbrian People Panel

SESSION SUM UP

TODAY WE WILL...



- Talk to you about what life will be like in 2050 based on:
 - Some scenarios
 - Some different personas, or examples of Northumbrian Water customers
- This will help inform Northumbrian Water's long term strategies, which we will talk about in future sessions

LET'S CHAT

Tell us...

- ✓ **What were the biggest changes in the last 25 years?**
- ✓ **What do you think life will be like in 25 years?**

INTRODUCTION

WHAT IS A LONG TERM STRATEGY?

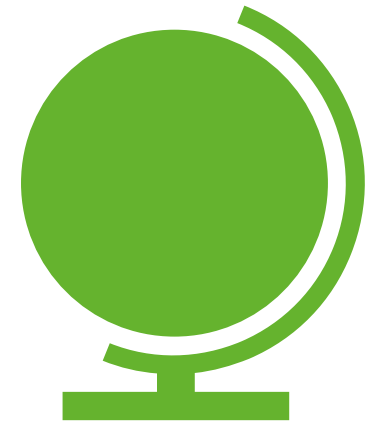
- Northumbrian Water, like all water companies, is a **regulated** business
- Our economic regulator is **Ofwat**
- Historically we have planned our investment in five year cycles, through the development of a **five year business plan** that we submit to Ofwat who then set the prices that we can charge for the services we provide
- Going forward we **need to think longer term**, and prepare our business plan for the next five years in the context of a longer term strategy e.g. the next 25 years
- This is because:
 - We are a **long term business** - we are still drinking the same water as the dinosaurs and some equipment like our pipes last up to or beyond 50 years
 - There are some **long term issues and challenges** that we must respond to, like the impact of climate change



INTRODUCTION

THE SCENARIOS

- But how do you plan for the next 25 years when there are so many unknowns?
- Just look at the impact of COVID
- We have therefore developed scenarios to help us understand what the world might look like in 25 years
- The scenarios have been developed by:
 - Expert thinking and modelling conducted by scientists, economists and futurologists
 - Some predicted trends shared with the industry by Ofwat
- There are four scenarios in total



INTRODUCTION

THE SCENARIOS

Prioritising the environment

Customers and the government prioritise the environment

The impact of climate change is minimised

The economy is stable

Climate chaos

The impact of climate change is significant

The economy is not stable and customers have less disposable income

Customers and the government focus on food and shelter, not the environment

Tightening the purse strings

Customers feel the effects of the rising cost of living

The government don't prioritise the environment until 2040 then introduce environmental legislation to reduce carbon emissions and the effects of climate change are minimised

More customers struggling to pay bills and higher unemployment

An innovative future

The government is focussed on technology and innovation, not the environment

However, the economy has improved and customers have more disposable income

The impact of climate change is expected to be moderate

LET'S PAUSE FOR QUESTIONS



INTRODUCTION

THE PERSONAS

- The personas have been developed to help us imagine what life will be like for ‘typical’ Northumbrian Water and Essex & Suffolk Water customers in 2050
- This helps us to plan our investment to meet their needs and priorities
- The personas have been chosen based on the most common stereotypes of people in our regions
- We have described the lives of the personas now (in 2022)
- We want you to help us think about what they could be like in 2050 in the scenarios



INTRODUCTION

THE PERSONAS - TODAY



John (Middle aged, Newcastle)

John lives with his wife and two children in their three bedroom terrace home in Gosforth, Newcastle. John has an average income, working in IT support and his wife works in sales. John is currently working from home but his company plans for him to return at least part time.



Chloe (Young adult, Ashington)

Chloe lives in Ashington, a town now seeing economic decline, with a reduction in public services. Chloe works in administration at the local GP practice. She lives in a terraced house with a lodger. She inherited the house from her grandmother.



Asha (Early 30s, Gateshead)

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.



Mary (Mid 40s, Brentwood)

Mary works in management for a major food retailer in Brentwood, Essex. Mary joined the company on their graduate scheme before the 2008 crash and has worked her way to a regional management position. She lives in a suburban detached home with her partner and two cats.



Richard (Retired, Southwold)

Richard and his wife moved to a detached house in Southwold after their adult children left home and he retired. Richard frequently travels abroad where travel restrictions allow and is a prominent member of the local golf club.

LET'S CHAT

Tell us...

What do you think of them?

Do they resonate with you in any way?

Do you recognise friends and family in them?

WHAT WE WANT TO TALK TO YOU ABOUT

The scenarios are fixed.

The personas are fixed for 2022.

In a broad context we have started to think about how the personas would be affected in each scenario (e.g. how their lives would be different) in 2050.

We want you to think about the personas living in the scenarios in 2050 and discuss:

- What would be different about the services provided by Northumbrian Water**
- What would be most important to the personas**

Remember, the personas aren't ageing 25 years – imagine their lives are just being picked up and moved to 2050.

WHAT WE WANT TO TALK TO YOU ABOUT

In each People Panel we will focus on how two of the personas will be affected in two of the scenarios.

Today we are going to focus on:

Prioritising the environment

Tightening the purse strings

John (middle aged,
Newcastle)

Asha (early
30s,
Gateshead)

THE SCENARIOS

PRIORITISING THE ENVIRONMENT

- This is where all things green take priority in the future
- Following COVID, the UK focuses investment on a green recovery (focussing on investment in environmentally friendly industries)
- The UK is ahead in terms of cutting carbon footprint and achieving net zero
- The government has introduced stricter environmental legislation
- The environment and sustainability is increasingly important to citizens and they adopt technologies like electric cars quickly
- Global warming is kept under two degrees and so the impact of climate change is minimised
- The workplace continues to involve some working from home
- Steady population growth and the economy is stable



PRIORITISING THE ENVIRONMENT

JOHN FROM NEWCASTLE

2022

Everything green has taken priority

2050

John lives with his wife and two children in their three bedroom terrace home in Gosforth, Newcastle. John has an average income, working in IT support and his wife works in sales. John is currently working from home but his company plans for him to return at least part time.

John continues to work from home in IT three days a week. He was instrumental in setting up a community group to take up government grants for green development – which so far has resulted in swale installation at his children's school as well as solar panels on the new community centre. John swapped his car for an EV and has a home charging port set up.

PRIORITISING THE ENVIRONMENT

ASHA FROM GATESHEAD

2022

Everything green has taken priority

2050

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

After Asha lost her job in the Covid pandemic, money was tight in her household. However, her partner was able to swap his job delivering parcels to work as an installer for battery storage. They recently moved from their post-war estate to a family friendly suburban area where they managed to buy their first home. The home is carbon neutral, as per new UK guidelines.

LET'S PAUSE FOR QUESTIONS



PRIORITISING THE ENVIRONMENT

JOHN FROM NEWCASTLE

2022

Everything green has taken priority

2050

John lives with his wife and two children in their three bedroom terrace home in Gosforth, Newcastle. John has an average income, working in IT support and his wife works in sales. John is currently working from home but his company plans for him to return at least part time.

- Everything green takes priority
- Investment in green recovery post-Covid
- Ahead of targets to achieve reduced carbon footprint/net zero
- Environment and sustainability important to citizens
- Workplace involves some WfH
- Economy is stable

John continues to work from home in IT three days a week. He was instrumental in setting up a community group to take up government grants for green development – which so far has resulted in swale installation at his children's school as well as solar panels on the new community centre. John swapped his car for an EV and has a home charging port set up.

PRIORITISING THE ENVIRONMENT

ASHA FROM GATESHEAD

2022

Everything green has taken priority

2050

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

- Everything green takes priority
- Investment in green recovery post-Covid
- Ahead of targets to achieve reduced carbon footprint/net zero
- Environment and sustainability important to citizens
- Workplace involves some WfH
- Economy is stable

After Asha lost her job in the Covid pandemic, money was tight in her household. However, her partner was able to swap his job delivering parcels to work as an installer for battery storage. They recently moved from their post-war estate to a family friendly suburban area where they managed to buy their first home. The home is carbon neutral, as per new UK guidelines.

LET'S CHAT

Tell us...

Think about John/Asha's life in 2050 in this scenario:

How do you think the scenario will affect:

- **What is most important to customers about the service Northumbrian Water provides**
 - **Think about customer service, environment, affordability, providing a resilient water supply, providing a resilient waste water service, supporting vulnerable customers**
 - **The service that Northumbrian Water provide to customers or how they might need to respond in this scenario**
- **How they use and value water?**
- **The customer service customers expect from Northumbrian Water?**

THE SCENARIOS

TIGHTENING THE PURSE STRINGS

- This is where customers feel the effects of the rising cost of living and services
- Following COVID, the UK attempted to build back better with non-green investment. Other countries who did invest in a green recovery have benefited from a boom in jobs in these industries, the UK attempts to catch up between 2040 and 2050
- Through increased environmental legislation, the UK meets its carbon footprint targets and global warming is kept to 2 degrees
- However due to the rising cost of living and a flat economy in the 2020s and 2030s, there are more customers struggling to pay their bills and higher unemployment
- Working patterns continue as a mix of home and office working



TIGHTENING THE PURSE STRINGS

JOHN FROM NEWCASTLE

2022

Customers feeling rising cost of living

2050

John lives with his wife and two children in their three bedroom terrace home in Gosforth, Newcastle. John has an average income, working in IT support and his wife works in sales. John is currently working from home but his company plans for him to return at least part time.

John's family weather the increasing cost of living, although their plans for an annual holiday abroad get changed to a British staycation. This is in alignment with the government's 2040 taxation policy on overseas leisure travel, and so John and family started to see the benefits of holidaying at home more. John has always been worried about the environment and voted for the 'Green Pivot' in 2039. He feels a sense of pride that the UK prioritises its natural environment and is cautiously optimistic about his children's future.

TIGHTENING THE PURSE STRINGS ASHA FROM GATESHEAD

2022

Customers feeling rising cost of living

2050

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

Asha is one of many young workers who was laid off in the 2030's due to challenging economic circumstances in the NE, and the family starts to rely on foodbanks to feed themselves. They are struggling to pay the bills. After a tough few years, Asha and her partner are able to get a job that emerges out of the 'Green Pivot'. This allows them to start to build up their savings and start planning to buy their own house.

LET'S CHAT

Tell us...

Think about John/Asha's life in 2050 in this scenario:

How do you think the scenario will affect:

- **What is most important to customers about the service Northumbrian Water provides**
 - **Think about customer service, environment, affordability, providing a resilient water supply, providing a resilient waste water service, supporting vulnerable customers**
 - **The service that Northumbrian Water provide to customers or how they might need to respond in this scenario**
- **How they use and value water?**
- **The customer service customers expect from Northumbrian Water?**

TIGHTENING THE PURSE STRINGS

JOHN FROM NEWCASTLE

2022

Customers feeling rising cost of living

2050

John lives with his wife and two children in their three bedroom terrace home in Gosforth, Newcastle. John has an average income, working in IT support and his wife works in sales. John is currently working from home but his company plans for him to return at least part time.

- Rising cost of living
- Non-green investment post-Covid
- UK meets its carbon footprint targets
- More customers struggling to pay their bills
- Higher unemployment
- Work: mix of office and WfH

John's family weather the increasing cost of living, although their plans for an annual holiday abroad get changed to a British staycation. This is in alignment with the government's 2040 taxation policy on overseas leisure travel, and so John and family started to see the benefits of holidaying at home more. John has always been worried about the environment and voted for the 'Green Pivot' in 2039. He feels a sense of pride that the UK prioritises its natural environment and is cautiously optimistic about his children's future.

TIGHTENING THE PURSE STRINGS

ASHA FROM GATESHEAD

2022

Customers feeling rising cost of living

2050

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

- Rising cost of living
- Non-green investment post-Covid
- UK meets its carbon footprint targets
- More customers struggling to pay their bills
- Higher unemployment
- Work: mix of office and WfH

Asha is one of many young workers who was laid off in the 2030's due to challenging economic circumstances in the NE, and the family starts to rely on foodbanks to feed themselves. They are struggling to pay the bills. After a tough few years, Asha and her partner are able to get a job that emerges out of the 'Green Pivot'. This allows them to start to build up their savings and start planning to buy their own house.



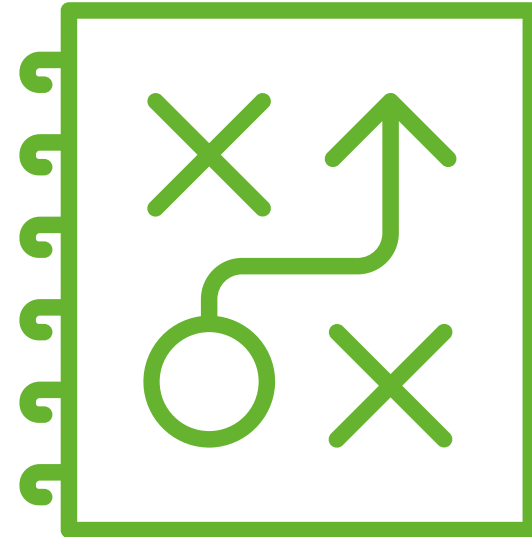
**NORTHUMBRIAN
WATER** *living water*

WHAT'S NEXT?

WHAT'S NEXT?

YOUR TASK FOR THE NEXT FEW WEEKS

- Thank you for your feedback!
- In the next two sessions we will be talking to you about what you think Northumbrian Water's priorities should be for 2050 and how ambitious you think they should be with their targets
- We will be sending some pre-work in advance, so please look out for it



THANK YOU

**See you for our next session on
Monday 4 April**

ESSEX & SUFFOLK
WATER *living water*

Slide Pack

ESSEX & SUFFOLK
WATER *living water*

Welcome to the
Suffolk People Panel

LET'S GET INTRODUCED FIRST!

Tell us...

- ✓ **Your name**
- ✓ **Where you're from**
- ✓ **Your favourite thing to do with water**
- ✓ **A guess at the worst thing found in a sewer in Great Britain**

SCOTLAND



Sewer was blocked by large Pooh

Last updated 17 Feb 2014 00:03 GMT



A Winnie the Pooh teddy bear was found dumped in a manhole in East Kilbride, South Lanarkshire



Villagers kick up stink after collapse of sewer



MOPPING UP: Workmen clean up the excrement after flooding caused a sewer to collapse in Middleton St George



EXCREMENT flowed down a street yesterday after a collapsed sewer made a road crack open.

WHAT ARE WE DOING HERE? ROLE OF THE PANEL

- You are all here to act as the voice of Essex & Suffolk Water's customers
- It's really important we hear from all of you!



- We want you to...

- **Challenge** Essex & Suffolk Water's thinking
- Give **honest** feedback
- Tell us how we can best support you and align what we do with **your priorities**

LET'S START WITH THE BASICS

WHO IS ESSEX & SUFFOLK WATER?



- Essex & Suffolk Water provides water supply services to 1.8 million people in Essex and Suffolk
- We also operate in the North East as “Northumbrian Water”
- We put our customers at the heart of what we do and our plans for the future

WE PROVIDE WATER SERVICES...

- We are responsible for getting clean, clear drinking water that tastes good to your tap.
- To do this, we take water from rivers, reservoirs and underground into water treatment works where the water is treated to make it safe for drinking.
- This water is then pumped to homes and businesses for drinking water, or for use around the home like washing.



WE PROVIDE WASTEWATER SERVICES IN THE NORTH EAST...

- In the North East, we take away wastewater through our sewer network, treat it to make it safe and clean enough to release into the environment and then feed the cleaned water back into rivers and the sea.
- In Suffolk, this service is provided by Anglian Water.
- In the North, we also collect the sludge which can be recycled as fertiliser or used to generate energy.



WHAT DOES THIS LOOK LIKE?

We employ just under **3,000** people and operate:

53 water
treatment
works

394 water
pumping
stations

341 water
service
reservoirs

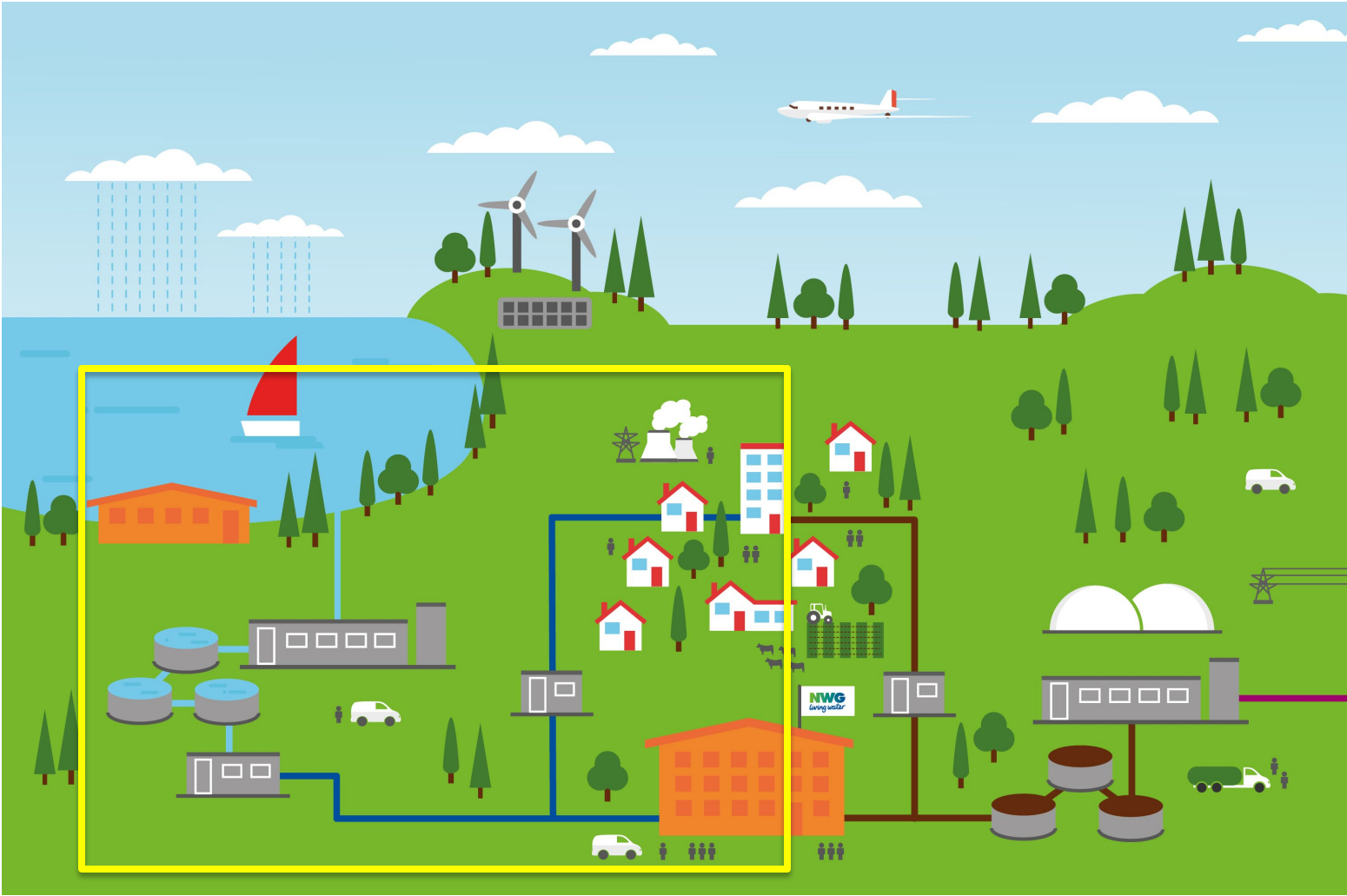
26,200.20 km
water mains

410 sewage
treatment
works

1,007 sewage
pumping
stations

30,106 km
sewers

HOW DOES THIS ALL FIT TOGETHER?



BUT ESSEX & SUFFOLK WATER IS THINKING ABOUT LOTS MORE WHEN WE'RE GOING ABOUT OUR WORK...



LET'S PAUSE FOR QUESTIONS



PRE-WORK

BEFORE YOU COME TO THE SESSION



- Talk to you about what life will be like in 2050
- This will help inform Essex & Suffolk Water's long term strategy, which we will talk about in future sessions
- To help prepare can you think about:
 - What life was like 25 years ago – what are the biggest changes you have seen yourself, or are aware of, over that time?
 - Where will you or your family be in 25 years time – think about life stage, location, ambitions, cost of living, the environment, technology, what kind of world you want it to be

ESSEX & SUFFOLK WATER *living water*

Welcome to the
Suffolk People Panel

SESSION SUM UP

TODAY WE WILL...



- Talk to you about what life will be like in 2050 based on:
 - Some scenarios
 - Some different personas, or examples of Essex & Suffolk Water customers
- This will help inform Essex & Suffolk Water's long term strategies, which we will talk about in future sessions

LET'S CHAT

Tell us...

- ✓ **What were the biggest changes in the last 25 years?**
- ✓ **What do you think life will be like in 25 years?**

INTRODUCTION

WHAT IS A LONG TERM STRATEGY

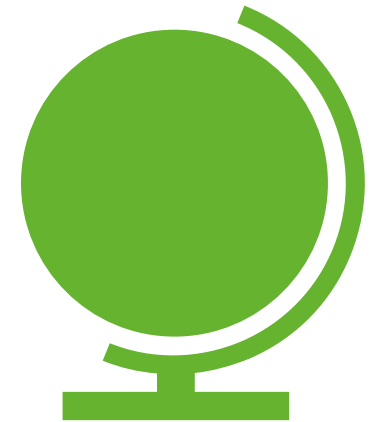
- Essex & Suffolk Water, like all water companies, is a regulated business
- Our economic regulator is Ofwat
- Historically we have planned our investment in five year cycles, through the development of a five year business plan that we submit to Ofwat who then set the prices that we can charge for the services we provide
- Going forward we need to think longer term, and prepare our business plan for the next five years in the context of a longer term strategy e.g. the next 25 years
- This is because:
 - We are a long term business - we are still drinking the same water as the dinosaurs and some equipment like our pipes last up to or beyond 50 years
 - There are some long term issues and challenges that we must respond to, like the impact of climate change



INTRODUCTION

THE SCENARIOS

- But how do you plan for the next 25 years when there are so many unknowns?
- Just look at the impact of COVID
- We have therefore developed scenarios to help us understand what the world might look like in 25 years
- The scenarios have been developed by:
 - Expert thinking and modelling conducted by scientists, economists and futurologists
 - Some predicted trends shared with the industry by Ofwat
- There are four scenarios in total



INTRODUCTION

THE SCENARIOS

Prioritising the environment

Customers and the government prioritise the environment

The impact of climate change is minimised

The economy is stable

Climate chaos

The impact of climate change is significant

The economy is not stable and customers have less disposable income

Customers and the government focus on food and shelter, not the environment

Tightening the purse strings

Customers feel the effects of the rising cost of living

The government don't prioritise the environment until 2040 then introduce environmental legislation to reduce carbon emissions and the effects of climate change are minimised

More customers struggling to pay bills and higher unemployment

An innovative future

The government is focussed on technology and innovation, not the environment

However, the economy has improved and customers have more disposable income

The impact of climate change is expected to be moderate

LET'S PAUSE FOR QUESTIONS



INTRODUCTION

THE PERSONAS

- The personas have been developed to help us imagine what life will be like for ‘typical’ Northumbrian Water and Essex & Suffolk Water customers in 2050
- This helps us to plan our investment to meet their needs and priorities
- The personas have been chosen based on the most common stereotypes of people in our regions
- We have described the lives of the personas now (in 2022)
- We want you to help us think about what they could be like in 2050 in the scenarios



INTRODUCTION

THE PERSONAS - TODAY



John (Middle aged, Newcastle)

John lives with his wife and two children in their three bedroom terrace home in Gosforth, Newcastle. John has an average income, working in IT support and his wife works in sales. John is currently working from home but his company plans for him to return at least part time.



Chloe (Young adult, Ashington)

Chloe lives in Ashington, a town now seeing economic decline, with a reduction in public services. Chloe works in administration at the local GP practice. She lives in a terraced house with a lodger. She inherited the house from her grandmother.



Asha (Early 30s, Gateshead)

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.



Mary (Mid 40s, Brentwood)

Mary works in management for a major food retailer in Brentwood, Essex. Mary joined the company on their graduate scheme before the 2008 crash and has worked her way to a regional management position. She lives in a suburban detached home with her partner and two cats.



Richard (Retired, Southwold)

Richard and his wife moved to a detached house in Southwold after their adult children left home and he retired. Richard frequently travels abroad where travel restrictions allow and is a prominent member of the local golf club.

LET'S CHAT

Tell us...

What do you think of them?

Do you resonate with them in any way?

Do you recognise friends and family in them?

WHAT WE WANT TO TALK TO YOU ABOUT

The scenarios are fixed.

The personas are fixed for 2022.

In a broad context we have started to think about how the personas would be affected in each scenario (e.g. how their lives would be different) in 2050.

We want you to think about the personas living in the scenarios in 2050 and discuss:

- What would be different about the services provided by Essex & Suffolk Water**
- What would be most important to the personas**

Remember, the personas aren't ageing 25 years – imagine their lives are just being picked up and moved to 2050.

WHAT WE WANT TO TALK TO YOU ABOUT

In each People Panel we will focus on how two of the personas will be affected in two of the scenarios.

Today we are going to focus on:

Climate chaos

An innovative future

Richard (retired,
Southwold)

Asha (early 30s,
Gateshead)

THE SCENARIOS

CLIMATE CHAOS

- This is where effects of climate change are significant and have the biggest impact on customers
- The population has grown rapidly and the economy is not stable
- Economic pressures have been of higher importance to the government than the environment and legislation and investment has reflected this
- The UK has not achieved its carbon footprint targets and we are on track for a 4 degree increase in global warming by the end of the century
- The disposable income of our customers has decreased and there is a minimum amount of working from home
- Customers' focus has been on essentials such as food and shelter, not the environment



CLIMATE CHAOS

RICHARD FROM SOUTHWOLD

2022

Richard and his wife moved to a detached house in Southwold after their adult children left home and he retired. Richard frequently travels abroad where travel restrictions allow and is a prominent member of the local golf club.

Significant climate change and lower disposable income

2050

Richard has not felt the economic impacts of the climate crisis gathering, but his lifestyle has been affected. He has moved his annual August trip to Spain to early April after soaring temperatures of 50 degrees led to hospitalisation due to heat stroke.

CLIMATE CHAOS

ASHA FROM GATESHEAD

2022

2050

Significant climate change and lower disposable income

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

Asha and her partner have felt the pinch as the climate crisis has accelerated. They have struggled to continue to pay their household bills and have had to get rid of their car as fuel prices rose too high.

LET'S PAUSE FOR QUESTIONS



LET'S CHAT

Tell us...

Think about Richard and Asha's lives in 2050 in this scenario:

How do you think the scenario will affect:

- **What is most important to customers about the service Essex & Suffolk / Northumbrian Water provides**
 - **Think about customer service, environment, affordability, providing a resilient water supply, providing a resilient waste water service, supporting vulnerable customers**
 - **The service that Essex & Suffolk / Northumbrian Water provide to customers or how they might need to respond in this scenario**
- **How they use and value water?**
- **The customer service customers expect from Essex & Suffolk / Northumbrian Water?**

CLIMATE CHAOS

RICHARD FROM SOUTHWOLD

2022

Richard and his wife moved to a detached house in Southwold after their adult children left home and he retired. Richard frequently travels abroad where travel restrictions allow and is a prominent member of the local golf club.

Significant climate change and lower disposable income

- Significant effects of climate change
- UK has not achieved its carbon footprint targets
- Economy not stable
- High population growth
- Lower disposable income
- Minimum working from home

2050

Richard has not felt the economic impacts of the climate crisis gathering, but his lifestyle has been affected. He has moved his annual August trip to Spain to early April after soaring temperatures of 50 degrees led to hospitalisation due to heat stroke.

CLIMATE CHAOS

ASHA FROM GATESHEAD

2022

2050

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

Significant climate change and lower disposable income

- Significant effects of climate change
- UK has not achieved its carbon footprint targets
- Economy not stable
- High population growth
- Lower disposable income
- Minimum working from home

Asha and her partner have felt the pinch as the climate crisis has accelerated. They have struggled to continue to pay their household bills and have had to get rid of their car as fuel prices rose too high.

THE SCENARIOS

AN INNOVATIVE FUTURE

- The UK is focussed on technology and innovation
- The UK focussed on economic recovery over environmental considerations after COVID
- This means economic conditions have improved, and the North East has levelled up and customers have more disposable income
- However, the UK is behind on its carbon footprint targets
- The world is expecting global warming of 2.4 degrees, and so climate change impact is expected to be moderate
- Consumers are able to choose their water company, like you can your electricity supplier
- There are high levels of remote working



AN INNOVATIVE FUTURE

RICHARD FROM SOUTHWOLD

2022

Focus on technology and innovation

2050

Richard and his wife moved to a detached house in Southwold after their adult children left home and he retired. Richard frequently travels abroad where travel restrictions allow and is a prominent member of the local golf club.

Richard values the government's investment in technology, after several investments pay off well for him, allowing him to buy a house in the south of Spain to winter in.

AN INNOVATIVE FUTURE ASHA FROM GATESHEAD

2022

Focus on technology and innovation

2050

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

Asha's work becomes ever more precarious as both she and her partner become more enmeshed in the growing 'gig' economy. Technology has taken over some roles in the manufacturing industry and the advent of driverless delivery vehicles puts her partner out of a job.

LET'S PAUSE FOR QUESTIONS



LET'S CHAT

Tell us...

Think about Richard/Asha's life in 2050 in this scenario:

How do you think the scenario will affect:

- **What is most important to customers about the service Essex & Suffolk / Northumbrian Water provides**
 - **Think about customer service, environment, affordability, providing a resilient water supply, providing a resilient waste water service, supporting vulnerable customers**
 - **The service that Essex & Suffolk / Northumbrian Water provide to customers or how they might need to respond in this scenario**
- **How they use and value water?**
- **The customer service customers expect from Essex & Suffolk / Northumbrian Water?**

AN INNOVATIVE FUTURE

RICHARD FROM SOUTHWOLD

2022

Focus on technology and innovation

2050

Richard and his wife moved to a detached house in Southwold after their adult children left home and he retired. Richard frequently travels abroad where travel restrictions allow and is a prominent member of the local golf club.

- Focus on technology, innovation and economic recovery
- Customers have more disposable income
- But the UK is behind on its carbon footprint targets – moderate climate change impact
- Consumers can choose their water company
- High levels of remote working

Richard values the government's investment in technology, after several investments pay off well for him, allowing him to buy a house in the south of Spain to winter in.

AN INNOVATIVE FUTURE ASHA FROM GATESHEAD

2022

Focus on technology and innovation

2050

Asha and her partner live with their 3 year old in a rental property on a post war estates in Gateshead. Asha was furloughed from her job in hospitality during the Covid-19 pandemic before being made redundant. Her partner is self employed as a delivery driver for a food delivery service.

- Focus on technology, innovation and economic recovery
- Customers have more disposable income
- But the UK is behind on its carbon footprint targets – moderate climate change impact
- Consumers can choose their water company
- High levels of remote working

Asha's work becomes ever more precarious as both she and her partner become more enmeshed in the growing 'gig' economy. Technology has taken over some roles in the manufacturing industry and the advent of driverless delivery vehicles puts her partner out of a job.



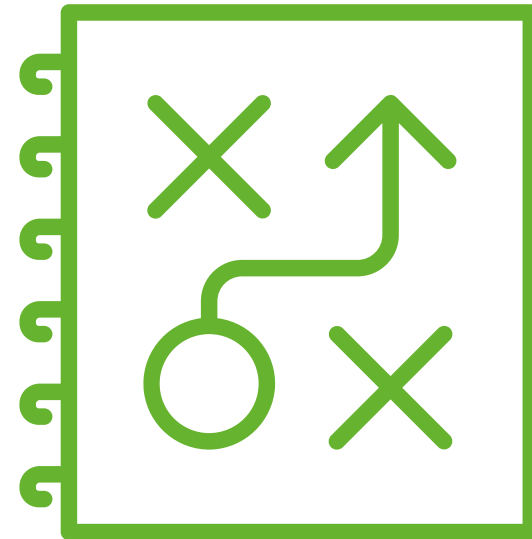
ESSEX & SUFFOLK
WATER *living water*

WHAT'S NEXT?

WHAT'S NEXT?

YOUR TASK FOR THE NEXT FEW WEEKS

- Thank you for your feedback!
- In the next two sessions we will be talking to you about what you think Essex & Suffolk Water's priorities should be for 2050 and how ambitious you think they should be with their targets
- We will be sending some pre-work in advance, so please look out for it



POLLS:

What did you think of tonight's session?

THANK YOU

**See you for our next session on
Monday 11 April**