

# DWMP Research

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Prepared for Welsh Water

July 2022



# This debrief comprises 4 main sections



**1) E-Learning Module**



**2) Introducing  
Customers to the  
DWMP**




**3) Detailed Evaluation of  
the DWMP**



**4) Future engagement  
with the DWMP**





## But first, here is what we were setting out to achieve in this research...

- 1) How do customers feel about what is being proposed in the DWMP consultation, and how well do they think it builds upon and aligns with the output from research conducted in 2020?
- 2) What impact does the E-learning module have on responding to key messages in the consultation?
- 3) How do customers want to be engaged with updates to the DWMP as it evolves over the next 5 years?
- 4) Exploring customer's willingness to pay for what is being proposed in the consultation?  
(addressed in more detail in subsequent phase of quantitative research via advanced analytics)

# Qualitative engagement conducted June 2022, via a 2-week online community

Aiming to deliver a more informed customer perspective, with 2 weeks of bespoke online activities to educate customers on some of the drainage and wastewater challenges before exposing them to DWMP literature.

Sample of 30 x household customers from across Wales:

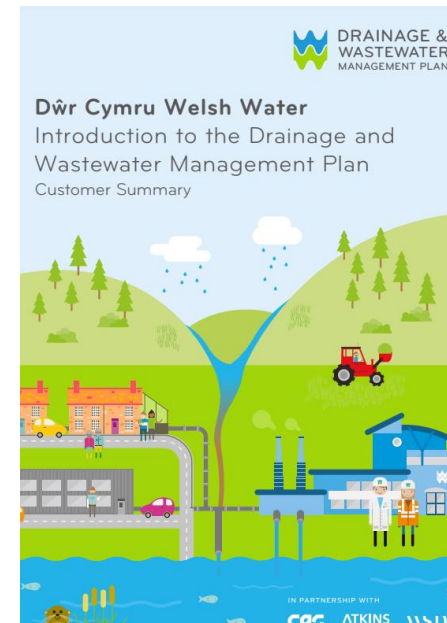
- Clwyd, Powys, Dyfed, Glamorgan, Gwent, Hereford, Chester, Gwynedd
- Equal split of gender
- Half living within 10 miles of SAC river
- Mix of lifestage – 18-22 living with parents, SINK/DINK, families, empty nesters, retired
- Also included some vulnerable customers and 3 x digitally disenfranchised via telephone depth interviews with pre-read stimulus materials



# Stimulus materials shown to customers in this research



E-Learning Module





# Clear that many of the customers taking part feel a close connection to water in their local environment

When they describe where they live, it is clear that for quite a few of these customers, their surroundings and environment are important to them.

There is a sense of pride in the beauty of the Welsh scenery and several customers describe the beauty of the rivers, river beaches, lakes, reservoirs, canals and coastal beaches near where they live.

It is also apparent from several introductory comments by customers that they are aware of some wastewater issues in their locality – mainly relating to odour from sewage treatment works.



*"We regularly go to the Elan Valley Visitor Centre, which is one of our favourite places. Staff are always very pleasant. We like the focus on nature at the Visitor Centre as well as the support for local artists."*

*"We love the wildness and the quietness, as well as being so close to nature and having our own river beach in walking distance for the summer."*

*"Welsh water have a sewage plant on Fabian way near us and there is always a really bad smell from there which on days when the wind is blowing we can smell it in our area. We also regularly have texts about discoloured water which is useful."*

# Key take-outs from qualitative customer engagement



**The E-Learning Module** has researched well with customers and delivered key information in an interesting and interactive way. It would however benefit from being shorter to maximise engagement.



**Introducing Customers to the DWMP** via the website literature reveals that customers do passionately care about the issues at the heart of it once they understand more about them, and they are shocked at the scale of the challenge.



**Detailed Evaluation of the DWMP** reveals that customers are fully on board with the direction of travel and the incremental improvement approach. They envisage a 50 year time frame to reach the end destinations and want investment via scenarios 1 or 3.



**Future engagement with the DWMP** on a fairly regular and proactive basis is desirable for this informed base who now realise just how much these plans directly affect their lives.



## Section 1 - E-Learning Module

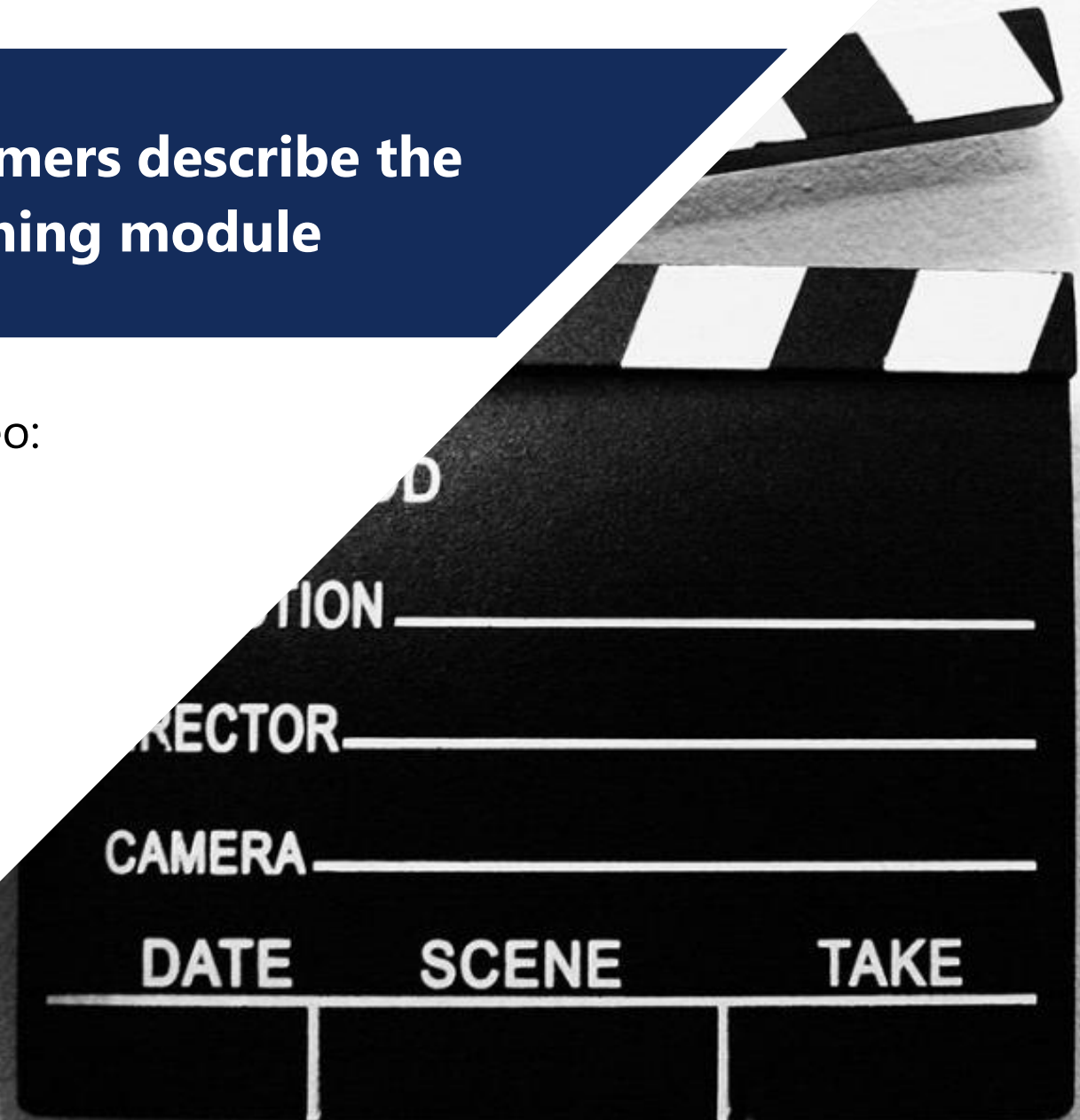


## Video: Let's see how our customers describe the experience of using the E-learning module

Click on the link below to watch the video:

<https://vimeo.com/727685970>

Password: RelishWales




# Interactive format works hard to engage customers, but consensus that it could convey same amount of info in much shorter version

- ✓ Interesting and informative content
- ✓ Well presented in bite sized chunks
- ✓ Easy to navigate
- ✓ Interactive quiz helps maintain engagement
- ✓ Welsh voiceover relatable
- ✓ Highlights the impact of customer actions on wastewater
- ✓ Surprising and challenging information on own consumption and wastage
- ✓ Historical information provides interesting angle
- ✓ Gives a real sense of importance and the need to act now
- ✓ Explains clearly the effect of rainwater entering the sewage system

- x Fairly long
- x Feels a bit repetitive
- x Flow of information could be improved with history coming first to set the scene
- x Graphs questions didn't work because customers could see the size of the graph (thus the answer) already
- x Couldn't see any links to website for further information at the end
- x No explanation of Storm Dennis (some unaware of what this was)





## Impact of using the E-learning module amongst informed base in the qual has been limited

Analysis of responses to all the core DWMP detailed questions reveals no discernible difference in response for the 50% of the sample who used the E-learning module.

This seems to be because this audience has additionally been exposed to 4 other pieces of extensive contextual and explanatory documentation by the time they answered the core questions on the DWMP in week 2.

We would expect a much less informed audience to benefit more from the E-learning module, though this is difficult to replicate in research.



## Section 2 - Introducing customers to the DWMP



## Upon reading about the Strategic Context, customers are strongly (and sometimes quite passionately) in agreement on the importance of the DWMP

- Climate change and population growth are seen as causing clear and understandable threats to ageing sewer and drainage system
- Some see first hand the effects of storm drains not coping and all believe it will get worse without imminent action
- Government pushing for new housing is felt to be exacerbating the problem
- Language used reflects genuine concern for the outcome if we don't act soon – 'calamitous', 'catastrophic', 'devastating', 'fearful'

25 year plan feels proactive and long term (taking it beyond electoral cycles), enabling DCWW to get ahead of the game

*"We need to plan long-term not just per election cycle. Climate change, frequent storms, flooding, new builds, worn out inadequate pipe work etc have built up problems that need proper planning and consultation."*

*"The implications of not acting now are enormous. In recent years we have already seen the results of storm drains being unable to cope with the volume of water that they have to deal with, in the flooding of peoples homes and businesses on a regular basis."*

*"There is a huge risk of sewage flowing into our rivers and water courses and also a risk of homes and businesses flooding. I feel that the threat to nature is very real and any increase in sewage in our River Dee could be devastating."*

# Sentiment of DCWW vision for the DWMP resonates with customers, though some elements could be made more specific

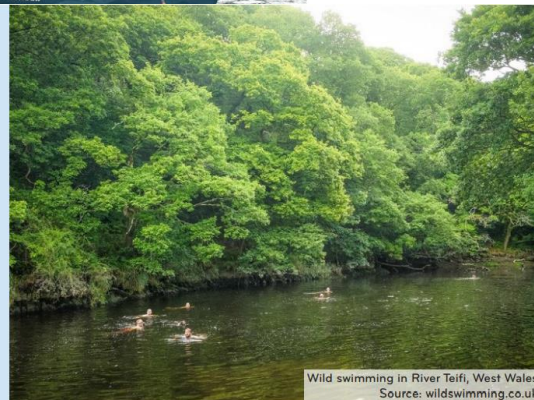
Our vision through the DWMP is to achieve a reduction in flooding to communities and improve water quality for people and the environment, whilst keeping our customers' bills affordable.



We want our customers to be able to enjoy their natural surroundings.



We want our future customers to continue to enjoy these benefits for years to come.



At the heart of the vision, customers welcome a commitment by DCWW to deliver a plan to protect the environment and reduce flooding in a way that is affordable for all. Several customers comment on how good it is to see that customers are clearly at the heart of this vision.

Taking a collaborative approach is also well received, although some want to see more detail on who the other organisations and agencies involved in this collaboration are – 'stakeholders' as a word means little to customers.

There is felt to be a lack of temporal information reflected in the vision which can lead to perceptions of being vague and non-specific on when this will be achieved. There is also some confusion over the references to water quality in the vision, with some confusing quality of drinking water with that of bathing/river water – thus language could be tightened up in places.



# Map identifying risks provides a 'wake-up' moment for customers and delivers justification for having such comprehensive and long term plans

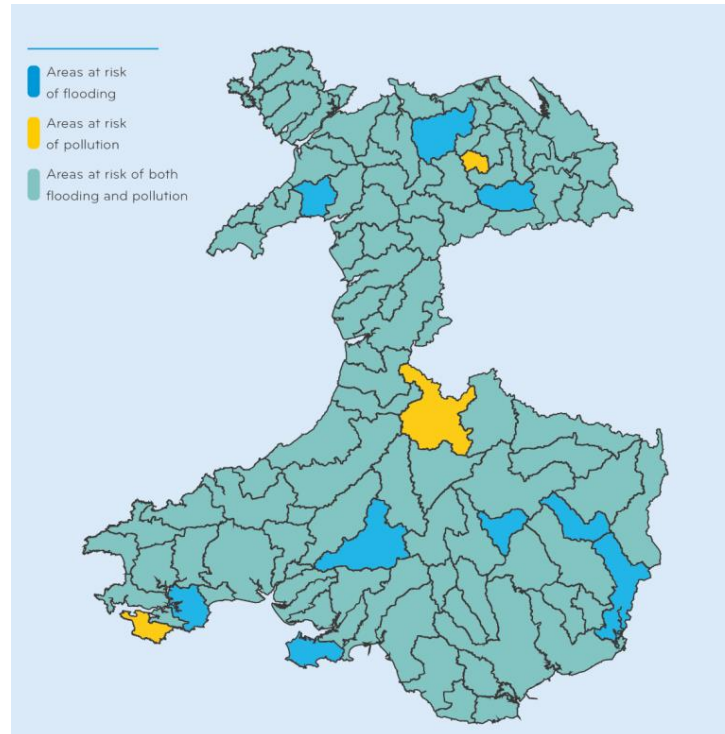
*"It is a real **eye opener**."*

*"I'm **extremely surprised** that predominantly the whole of Wales is at risk of flooding. It's also very surprising that only a small area isn't susceptible to flooding but is to pollution."*

*"So the whole country is at risk? This paints a **picture of despair** really and I for one looking at this think what's the point? What can we do?"*

*"The map is very **frightening** it shows a massive area of Wales as at risk of flooding and pollution including where I live."*

*"The areas at risk of both flooding and pollution being the near entirety of Wales is **staggering**."*



*"Looking at that map there has to be improvement everywhere. I was **shocked** to see that almost the whole area is at threat and needs work to be done straight away."*

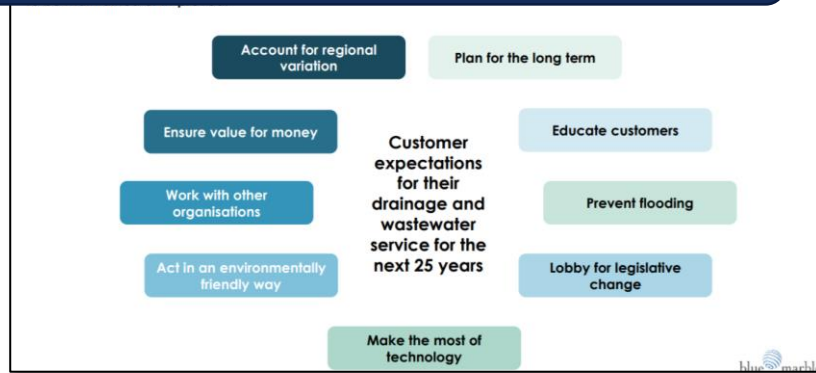
*"It seems to **solidify the need for Welsh Water and other governing bodies to produce a clear and concise plan to tackle these issues quickly**."*

*"It is **quite concerning** when you realise how extensive the risks are. When I first read the page I thought a small area would have been highlighted."*

*"I am unpleasantly surprised at the amount of areas assessed with a risk of both pollution and flooding, this **concerns me massively**. I didn't expect that."*

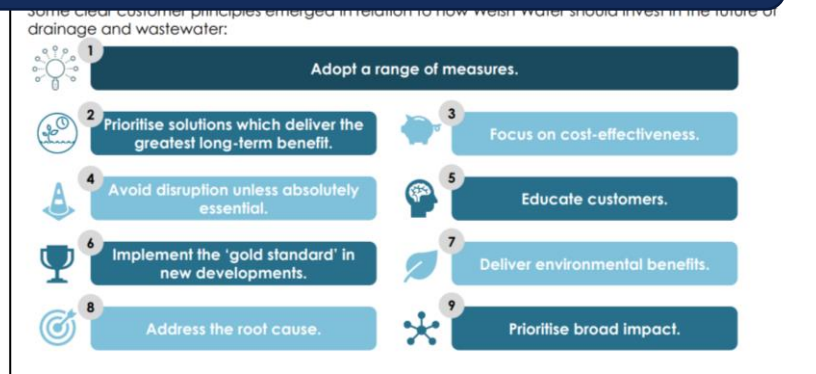
# Review of previous research results in customers wanting the DWMP to take a long term preventative approach dealing with problems at source and bringing customers up to speed

## Expectations from DWMP



- 1 Prevent flooding
- 2 Plan for long term
- 3 Act in env friendly way & educate customers

## Principles for DWMP investment



- 1 Address the root cause
- 2 Prioritise solutions with long term benefit
- 3 Educate customers

# These are customers that clearly want DCWW to do the right thing by them and the environment for the long term prevention of flooding

Customers see flooding as being truly devastating and something that needs to be avoided, whatever it takes to achieve that. **They do not want a situation in years to come when sewage flooding becomes the norm.**

They therefore voice support for a **'prevention not cure' approach**. The belief is that climate change and population growth are long term trends that require a long term proactive plan. Thus, they want DCWW to address the wastewater issues at source, believing this is the right thing to do for customers and the environment. Some of this work may involve working with other parties (developers for example) to produce more sustainable drainage solutions.

That customers have been shocked by some of the facts and figures in the introductory DWMP literature and E-learning module highlights the **importance of the public needing education on wastewater** – in particular on how flushing the wrong items can exacerbate the problem.

*"I agree completely with the fact that customers would want to see a plan for the long term, and particularly try to prevent any issues in the future rather than try to cure them."*

*"There needs to be concerted effort to ensure future generations are living in the best environment possible. Prevention is the only way to avoid more serious flooding and issues with waste water."*

*"The reality of challenges faced are surprising and so ensuring people are informed of that will be somewhat beneficial."*



# Customers are keen for DWMP to result in urgent significant investment in rainwater soakage and separation and customer education

Invest sooner and most £ in...

**Customer principles for investment** 10

We tested 16 un-costed investment options with customers, to understand which they preferred, and how acceptable each was.

<b>A</b> Rebuilding sewer pipes with larger diameter pipes	<b>B</b> Customer incentives to get foul water drains from road drains	<b>C</b> Infill ways of collecting and storing rainwater	<b>D</b> Using technology to control flow through sewers
<b>E</b> Building new treatment works where an area is at capacity	<b>F</b> Creating natural wetlands to store flood water during peak rainfall seasons	<b>G</b> Flood gates to stop homes flooding	<b>H</b> Pre-treating sewage while it is in the network
<b>I</b> Education on blockages	<b>J</b> Using roads as channels to move flooded sewage & surface water to uninhabited areas	<b>K</b> Customer incentives to change behaviour	<b>L</b> Incentivising trade customers to install pre-treatment
<b>M</b> Creating more permeable places for rainwater to soak into the ground	<b>N</b> Separating sewer pipes for foul water and rainwater carried in separate pipes	<b>O</b> Using roads as channels to move flood water to uninhabited areas after foul water separated	<b>P</b> Creating natural wetlands to store flood water during peak rainfall seasons once foul water separated

- 1 Creating more permeable places for rainwater
- 2 Education on blockages
- 3 Separating sewer pipes (foul and rain water)

# Green infrastructure solutions are seen as positive ways of tackling the DWMP issues at source and with a long term perspective

Customers see green infrastructure solutions (such as more permeable places for rainwater to soak) as positive change, albeit they recognise this may take considerable investment and time to achieve. These types of solutions are felt to have a **dual benefit of tackling the issue at source whilst also being very environmentally positive.**

Separation of foul and rainwater is something that also feels logical to customers to **reduce pressure on the wastewater drainage system,** albeit that again they don't know the reality of the funding or infrastructure implications.

Along with education, **these types of measures feel genuinely preventative, thus long term in their scope, but also likely to yield immediate effect once implemented.**

*"Creating more permeable places for water to drain - this is hugely important and should be implemented in planning for new build developments, so these sites drain into a natural water course, rather than an adopted drainage system."*

*"Getting involved in splitting water also seems like it wouldn't be too much expense on both people and welsh water and brings a togetherness."*

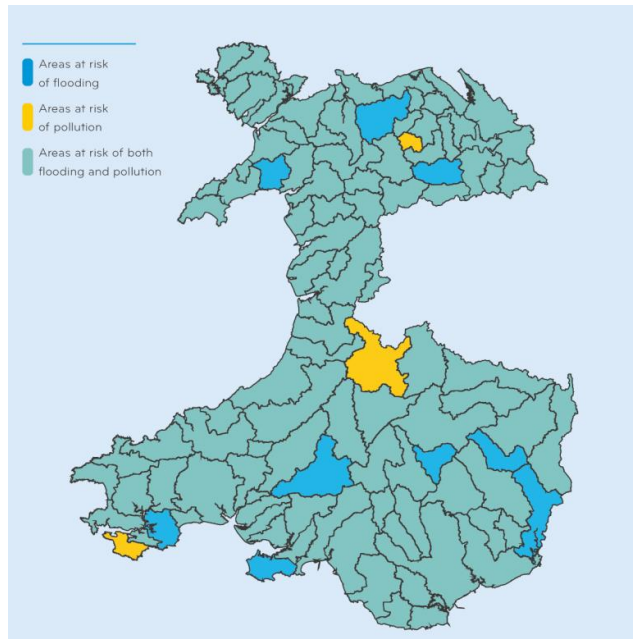
*"Separation of the different drains at the home will relieve some of the pressure by not so much water entering the system. I would want to see ways though that potentially the rain water could then be utilised to flush toilets."*



## **Section 3 - Detailed evaluation of the DWMP**



# On balance, customers want an approach that covers more areas against storms seen in an average year as this benefits more people and more communities



## Making a wider number of areas resilient to storms seen in an average year

- Earlier intervention for more people
- If normal weather causing problems, it makes sense to address this directly
- Will still have some positive impact on resilience to named storms
- Risk map reflects the breadth of need
- Addressing the more commonly occurring event
- More accurate data on these events may mean easier to plan
- Feels like money will have broader impact, thus more overall perceived value

VS

## Making a smaller number of areas resilient to named storms

- Named storms are genuinely concerning
- Addresses more devastating impact and reduces some of the most severe damage
- Allows a focus on the most vulnerable areas first
- Feels more 'fix forever' vs 'quick fix'
- Resilience at a lower level of weather can be expected

*[Note: More likely to be expressed by those living within 10 miles of a SAC river]*

In qualitative sample of more informed customers, balance is 2 to 1 in favour of going wider rather than narrower – but a definite area for exploration in follow-on quant survey

## However, the DCWW 'preferred approach' of incremental improvement with an element of targeted small zone is felt to be a sensible hybrid



Strong consensus that preferred incremental approach with targeted small zone approach where appropriate is a positive direction of travel for DCWW



Benefit to wide number of communities more quickly and thus providing value



Acknowledges that there cannot be a universal approach and shows flexibility by applying small zone approach in some (assumed higher risk) areas



When compared with the standard approach, the preferred approach feels like a proactive, long term approach that addresses issues at source – thus meeting many of the core expectations and principles outlined in earlier research – by contrast the standard approach feels reactive and more expensive in the long run

*"I think it's [preferred approach] a cautious but sensible approach and will be reviewed often along the way."*

*"I would agree with the preferred approach. It feels this fits with the plan put forward. There isn't going to be a one size fits all approach and that is recognised here."*

*"It's essential to take into account the way the networks are interlinked and potential knock-on effects or multiple gains. I would expect this as a customer to achieve maximum cost efficiency."*

# Consensus that prioritisation approach feels appropriate, though frequency of environmental flooding may be a useful addition

		Environmental Protection Priority				
		Special Areas of Conservation Storm Overflow Spills	SSSI Storm Overflow Spills	Shellfish And Bathing Water Storm Overflow Spills	Storm Overflow Spills to all Remaining Water Courses	Zero Environmental Spills
Customer Service Priority	Repeatedly Flooded Customers	Orange	Orange	Orange	Orange	Orange
	Internally Flooded Customers	Orange	Orange	Orange	Yellow	Green
	Externally Flooded Customers	Orange	Orange	Orange	Yellow	Green
	All Other Planned Wastewater Escapes	Orange	Yellow	Yellow	Yellow	Green
	Zero Flooding to Customers	Orange	Green	Green	Green	Green

## ENVIRONMENT

- Feels broadly right in terms of priority, though a few more comments from those living within 10 miles of a SAC river:
  - Feels intuitively to some as if there could be more environmental categories, though often unsure exactly what they would be – one example may be agriculture impacted
  - Doesn't seem to be a priority on frequency of environmental flooding as there is with customers – e.g. SSSI repeatedly flooded should be higher priority than SSSI that has once been flooded

## CUSTOMERS

- Focus on repeatedly flooded customers feels right as they understand how devastating this can be to homes, businesses, health and mental health
- Unclear whether repeated refers to repeated internal (higher perceived priority) or repeated external (lower perceived priority)
- Some want to know more about how it would take account of numbers of homes/businesses affected, ie. repeated flooding for 50 homes should be higher priority than repeatedly flooded street of 5 homes
- Unclear how customer vulnerabilities will be prioritized, if at all e.g. elderly, less affluent, young families etc.
- Potential lower priority category for customers affected by smell of nearby wastewater spills

Whilst the matrix feels considered and fair to customers when they realise it has to be a stepped process, it is not felt to be presented for a sufficiently accessible 'at a glance' understanding and may not be necessary customer-facing material at all



# Zero spills end destination feels apt but is brought into question by cost estimates – potential for environmental compromise here to 10 spills p.a.

*Customer destination\** is a time in the future when customers will no longer have flooding from sewage inside their homes or businesses or on their property due to a lack of ability to contain it

*Environmental destination\** is a time in the future when our rivers and coastal waters no longer receive untreated flows from our sewerage system, protecting their biodiversity and ecology.

\* We need to understand under what conditions this destination applies, drizzle to deluge.

There is strong agreement in principle with the customer and environmental destinations as put forward in the plan. Fundamentally, customers do not believe they should have to suffer from sewage affecting their homes, businesses or rivers/coastal water. However, there is also a realization for some (NOT those living near a SAC river) that this may be more of a 'goal' than an achievable outcome, given the impact of climate change and the many as yet unknown factors that could influence this in the future. Some are also concerned that in a cost of living crisis, working to end destinations of zero may result in unnecessary bill increases.

Category	Zero storm overflow spills and no sewage flooding in customers' homes due to lack of capacity	10 spills per year from storm overflows and no sewage flooding in customers' homes due to lack of capacity
Cost of customer destination	£11.292 Billion	£11.292 Billion
Cost of environmental destination	£17.412 Billion	£6.969 Billion
Total	£28.704 Billion	£18.262 Billion

Presenting as 2 scenarios in this way results in some customers trading off the potential impact of spills to their homes vs spills to rivers/coastal waters. Either way, the amounts of money are felt to be disturbingly large ('like Monopoly money').

There are those who reach the conclusion that compromise is not an option in spite of the huge investment required, and they want to push for zero spills. But there are also some (NOT living near a SAC river) who are prepared to compromise, because:

- they don't believe that zero spills is realistic as a destination (even if it is a nice goal to have)
- ultimately protection of their home is more important to them than protection of the wider environment
- 10 environmental spills per year may be worth further consideration depending on the potential extent of the damage it causes
- £10 billion less money required feels like a lot in a cost of living crisis

# However, while some compromise on environmental spills, it feels like there is no room for compromise on spills affecting homes and businesses

## Acceptability in the short term (whilst plans being implemented) of sewage escapes affecting homes and businesses:

- On dry days
- During a couple of days of drizzle
- During continuous winter downpours
- During named storms

} **Almost always unacceptable**  
(unless misunderstood)  
**Barely acceptable**  
**More acceptable**

*"It's just not acceptable at all to have sewage escapes on dry days. Why is it happening in dry weather as well as wet weather?"*

*"The current system should be able to cope with a couple of days of drizzle."*

*"It's certainly not ideal to have it happening during continuous winter downpours, but occasionally inevitable – although to be avoided whenever possible."*

# Customers' informed response on how soon they want to get to the destinations of zero spills averages out at about 50 years – but they want evidence of improvements much sooner than this

Ideally...

ASAP...and there are a couple who say as little as 10 years....but needs to be done properly and not in such a way that the cost burden is too much for customers

Within 25 years

Feels like the 25 year DWMP plan can make big inroads into achieving the end destinations, but few believe it can be fully completed in this timeframe

Within 35 years

Some want completion within 35 years though most still feel this may be overly ambitious given the scale of the challenge

Within 50 years

Feels both realistic and palatable for this customer base who have engaged with the detail of the plans as laid out thus far – without overly burdening customers with increased bills

60-100 years

Feels too far in the future to be able to realistically plan for, and in any case the plans seem to state that the status quo approach would take 100 years

*"I don't think it will ever be a project that could get done quickly. Looking at the data and information in the document, I think it would be at least 50 years."*

*"It's difficult to say as I do not have a good enough knowledge of the process involved to make an informed decision, but 50 years would sound palatable to me."*

*"I think as the plan is for 25 years, maybe a significant amount of changes could be implemented within that timeframe, maybe enough to impact."*



# These informed customers accept that bills will need to increase to keep the timescales palatable, but are cautious about advocating any sizeable increases during a cost of living crisis

Scenario	Description	Cost
Scenario 1	Ignore affordability and only consider the risks when they start to affect customers and the environment	<ul style="list-style-type: none"> <li>• Around £650<sup>6</sup> Million by 2030</li> <li>• £160 million every 5 years up to 2050</li> </ul>
Scenario 2	Minimise the cost for customers in the short term	<ul style="list-style-type: none"> <li>• Investment programme of £60 Million every 5 years for 25 years</li> <li>• A further £992 million programmed after 25 years</li> </ul>
Scenario 3	Varying investment over time	<ul style="list-style-type: none"> <li>• £60 million between 2025 and 2030</li> <li>• £240 million between 2031 and 2040</li> <li>• £480 million between 2041 and 2050</li> <li>• Leaving £511 Million after 2050</li> </ul>
Scenarios 2 and 3 will be more affordable and address less risks when compared with Scenario 1.		

- £36 p.a. (£3 p.m.) feels like an acceptable and fair amount of increase to most, though many still warn that this will not be the case for all households who are suffering in the current financial crisis
- **Scenario 1** preferred by those who see the urgency in the situation and want action asap (esp. those living near a SAC river) – investing more in short term seen as speeding up results and reducing costs in long term
- **Scenario 2** preferred by a minority who want short term cost to customers minimized (mainly due to current C.O.L. crisis)
- **Scenario 3** preferred by those who want an approach that addresses the urgency of the situation while also considering reality of cost impact on customer base; feels flexible and has potential to be adapted to suit new tech as it becomes available over time

# Customers want an approach that balances value and affordability with long term sustainability

Evaluating when to choose sustainable vs traditional solution has been the hardest question in this project for customers to answer – and doesn't feel like a very customer facing question. They struggle to apply a % difference. The customer perspective focuses on:

1. Wanting a sustainable approach because it feels intuitively 'right' and will lessen the need for further reactive expenditure downstream
2. But maintaining a sense of balance so that all DWMP work is affordable to customers

*"I don't like it when a company spends a bit of money on a job and then a few years later has to redo the job and spend more money – seems like a waste."*

*"Whilst I understand DCWW wating to keep costs as low as possible, it seems to me as if the traditional solution will be less effective in the long term."*

*"It is obviously going to cost a huge amount, however I do think best value for money needs to be sought due to the cost of living rising."*

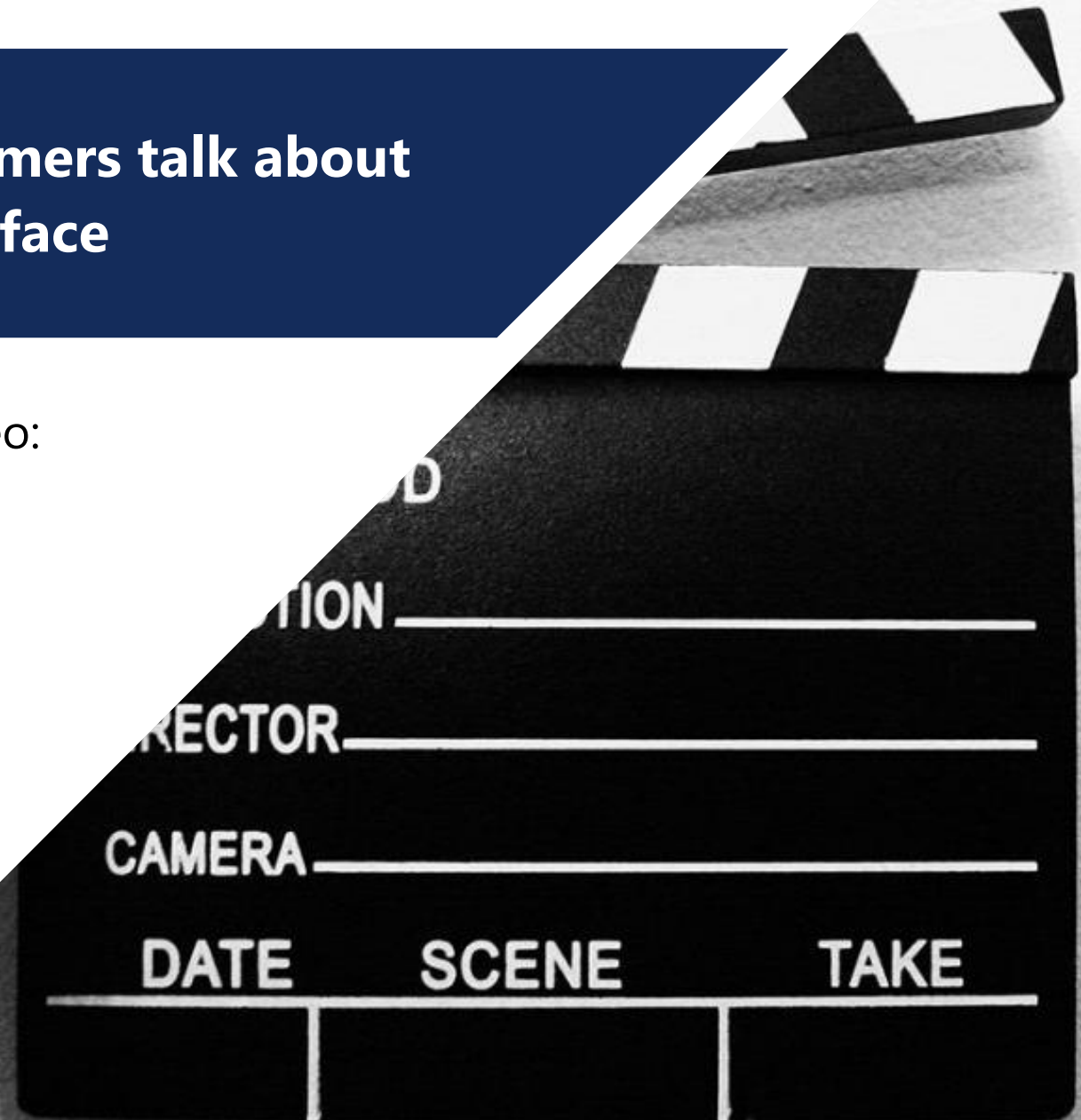


## Video: Let's see how our customers talk about the DWMP and challenges we face

Click on the link below to watch the video:

<https://vimeo.com/727687558>

Password: RelishWales





## Section 4 - Future engagement with the DWMP





*“Reading through the documents over the past two weeks has been a real education. I naturally understood that water waste needed to be disposed of responsibly, but didn’t really understand the implications on myself, other customers and the environment. Having a greater understanding has made me feel more invested in the process and I would like to build on this investment in the future.”*

# There has been amongst this informed base a high level of desire to engage further in the DWMP as the plans are developed and implemented

How has this desire for engagement with the DWMP emanated throughout the research process?

## Step 1

Rate of attrition in this research exercise has been moderate to high. We achieved 25 completes from 30 participants recruited, but in week 1 had to replenish several additional customers who dropped out. All of these non-completes viewed at least some of the documentation and made the conscious decision not to engage further, in spite of a large £ incentive for completing.



This immediately suggests that there are some customers who will never wish to engage with this level of information on the DWMP, which we would fully expect.

## Step 2

Once customers had fully engaged with the research, they quickly established that the DWMP will affect them - in particular via the risk map. When they began to understand the extent of the financial investment required and how this will affect future bills, their engagement in the process increased further.



It is largely because of the extent to which they realise the DWMP will affect them directly, not indirectly, that claimed desire to engage further as the DWMP evolves is so high.

# The rationale from these informed customers for future involvement is about transparency and having a say in what directly involves them

- ✓ To see how their money from bill increases is being spent
- ✓ To understand how the programme has evolved over time
- ✓ To hold DCWW to account via customer input and scrutiny
- ✓ To feel involved throughout the process on something that affects where they live
- ✓ To understand any potential disruption to customers

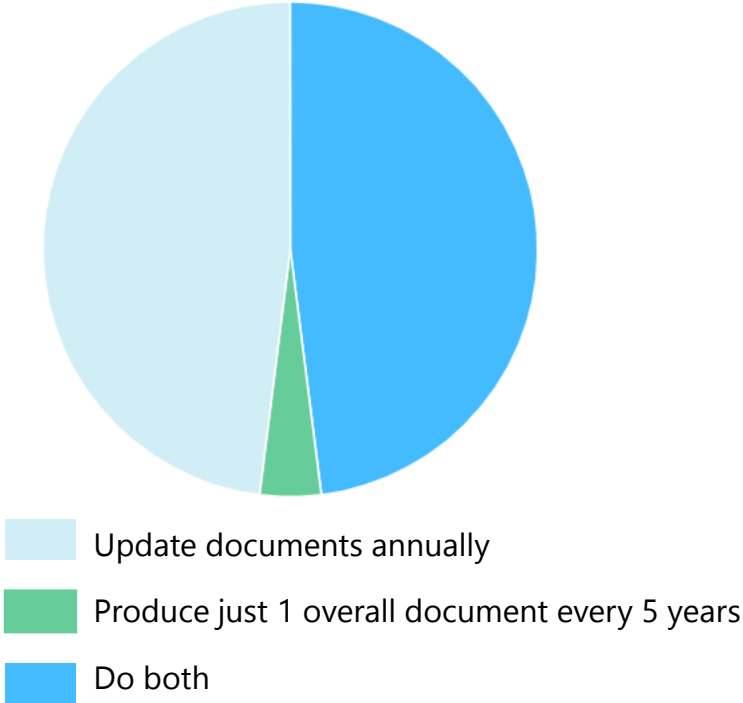
*"We need and want a progress report. We live near farms and the sea so it's important to log any changes to our environment as this will affect our quality of life and safety."*

*"It will give us some sense of how the plan is progressing and help us see any problems arising which might affect the end result."*

*"5 years is too long, too much will have been decided by then. To be truly responsive, it requires regular customer input and scrutiny."*

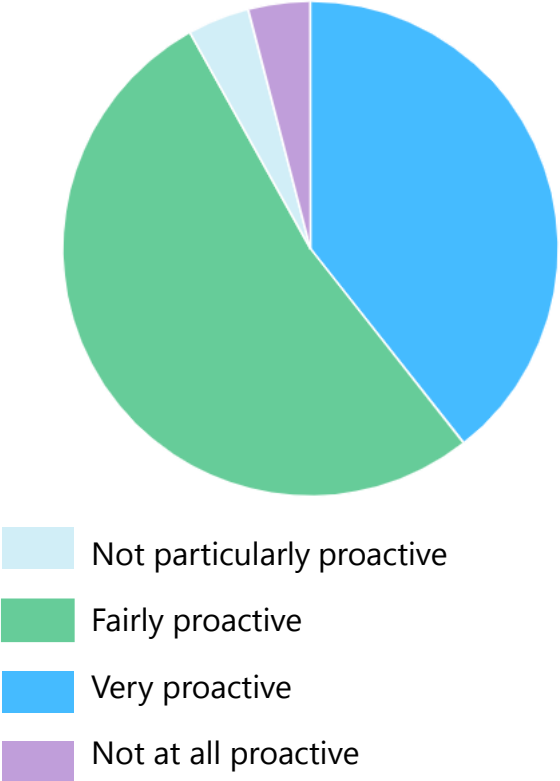
# For the most part, these informed customers want frequent updates and proactive communication from DCWW on the DWMP as it evolves

**How frequently do customers want updates on the DWMP?**



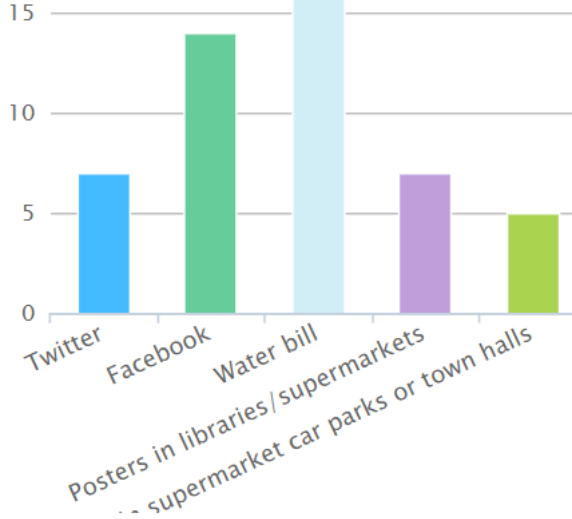
Would you prefer Welsh Water to produce a customer-friendly document for download on their website at the end of each of these stages (roughly once a year), or only when the plan is consulted on (every five years)? 23 responses

**How proactive do customers want DCWW to be in engaging them in the DWMP?**



How proactive would you like Welsh Water to be in trying to engage customers in the DWMP as it evolves? (e.g. by emailing customers directly, promoting links or videos on social media, engaging directly through local community groups etc.) 23 responses

**Beyond the website documentation, how else do customers want to find out about the DWMP as it evolves?**



If you are interested in finding out about the DWMP as it evolves over time, how else would you want Welsh Water to keep you updated? 23 responses



# Positive views on the contextual introductory documentation, though there may be some benefit in making them even more succinct for the less informed base



- Literature shared in week 1 very well received by customers – a genuine sense that they have learned a lot of new information from them
- They feel relatively accessible and easy to understand, in particular helped by the visuals and diagrams – and certainly much easier to engage with than the Non Tech Summary
- Customers welcome that they are publicly available to download from the website, though they feel this needs more promotion as they would never had known outside of this research
- The main critique of the these documents is that for a mass audience they are probably still a little too long and detailed and would benefit from being more concise and punchy (with links for further info if required)



*"These documents are very informative and written in a way that is easy to follow. The diagrams are a big help."*

*"The documents were useful but I'm not sure the average joe would take the time to read it all, so maybe a short poster version on the website or social media linking to one simple document."*

*"I found them informative and interesting. They gave me a detailed and user friendly insight into WW's thinking on future plans and made me think about the role they play in our lives and on the environment."*

## The Digitally Disengaged however seem more removed from the DWMP and will often find 5 yearly updates acceptable



Important to emphasize that the views of the Digitally Disengaged have been very similar on the DWMP direction of travel to other customers



But on future engagement, they are much less interested – they feel that sending out literature in the mail will be overkill and unlikely to result in many customers reading



Their views are in part likely because their involvement / personal investment in the research process has been less than those who have taken part for two weeks online; but this also reflects their realization that the only realistic way to provide this level of information is online and that this is simply too much effort/too difficult for them to engage with

*"I wouldn't read something annually, no, and I don't think others will either. People just won't be interested enough."*

*"It would be an extra expense to inform us all of the time like this, and the average person is totally disengaged, so I don't think there's a need to."*

*"It's fine to mention it in a letter you send out, or something with the bill, but I don't need to know the ins and outs of how you are doing it – I just need to know that you are doing it and an explanation for any resulting bill increases."*



**Interim summary and next steps**

# Interim summary findings (pre-quantitative research)...



**The E-Learning Module** is seen as engaging and informative on the backdrop to the DWMP, though would benefit from shortening. Likely impact on a less informed base will be greater than on the informed base in this qual phase.



**Introducing Customers to the DWMP** via the website literature reveals that customers often passionately care about these issues when they understand them. These documents have done a good job of empowering them to give informed feedback on the DWMP.



**Detailed Evaluation of the DWMP** reveals that customers are fully on board with the direction of travel. While there may be room to compromise on environmental end destination (10 spills p.a.), this is something that would need to be managed carefully from a PR perspective.



**Strong desire for future engagement with the DWMP** once customers know and understand how and to what extent the plans directly affect them. But we expect this desire for engagement to be much lower amongst less informed base in quant.



## Next steps

- 1** A **quantitative questionnaire**, conducted among a representative sample of DCWW's household customers and a selection of non-household customers, will:
  - Establish willingness to pay for different elements of the DWMP
  - Quantify answers to some of our qualitative findings among this, such as:
    - Interest in and engagement with the DWMP among a less informed base
    - Levels of support for our preferred approach
- 2** We will also ask a selection of our most engaged qualitative participants to complete our quantitative questionnaire, before taking part in one of **two workshops** (conducted via Zoom), delving into their responses over the course of this research, and exploring the findings that are emerging from the quantitative phase.
- 3** Final debrief of whole DWMP insight workstream.





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