

turquoise



Scottish Water Additional Support Register Research Presentation

Full Colour Thinking from Turquoise for Scottish Water

May 2019



**Scottish
Water**
Trusted to serve Scotland

Introduction and background.



Scottish Water (SW) provides clean and waste water services to Scotland. SW has a strong customer service focus and part of this is providing services to the more vulnerable elements of society.

SW holds an 'Additional Support' register, which is a register of customers who may be, in what are termed, 'vulnerable circumstances'.

The register is not actively promoted as things current stand, with just some 2,500 customers signed up to the register. It is believed that this is a low number in comparison to the likely 'real' numbers needing this support.

Research was required to explore and understand customer views on what they would expect from the additional support service, and potential future service options and expectations, as well as encouraging more people to sign up.



Research objectives.

01



To understand whether customers perceive SW as a company that cares for its customers. Whether there are companies that do this better. If there are, how and what do they do and what do they offer?

02



To understand whether customers perceive SW as a company that cares for its customers. Whether there are companies that do this better. If there are, how and what do they do and what do they offer?

03



To discover customer views on possible data sharing between utilities. If this provided a better service, would customers be prepared to allow sharing between utilities? Are there any benefits to direct sharing of information?

04



To evaluate customer thoughts on the services offered, from being on the register. What are the minimum expectations? Whom should be eligible to go on the register? I.e. Should it only be open to the most needy, or should it be more inclusive? How far should it go?

05



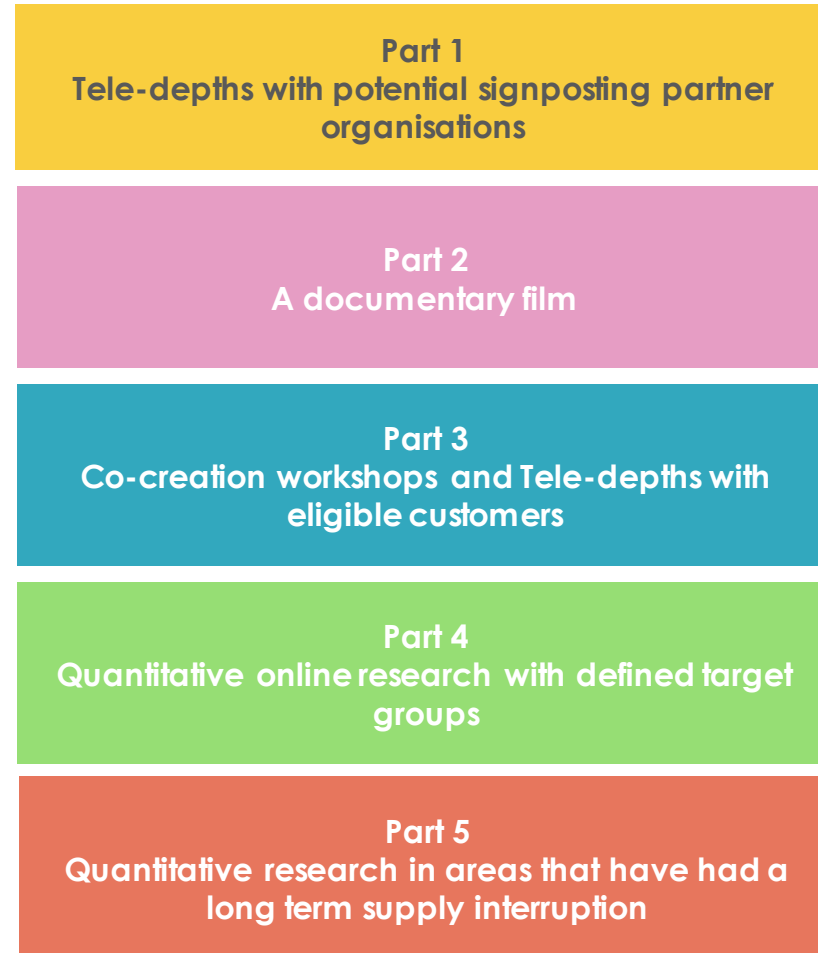
To determine where customers would expect to sign up to register for services. Expectations of signing up to the service? Where would customers expect to see it advertised? Are there any partnerships that could build on the service offer/ Are customers signed up with any other utilities' registers? What else could be useful that is not currently offered? How often would customers expect updates or information about the service and how/where?

06



To probe whether customers want 'needs codes' or have 'service needs'. Do customers prefer to share information about their situation (e.g. a visually impaired person) or would they prefer to sign up to a specific service without the need to share information about their condition? Are there any circumstances where service needs alone would be insufficient? If yes, what are the service needs that customers would expect?

Approach.





turquoise

Qualitative Research.



Are there any companies that care for customers?.



=

Not top of mind



Customers have little or no dealings with Scottish Water

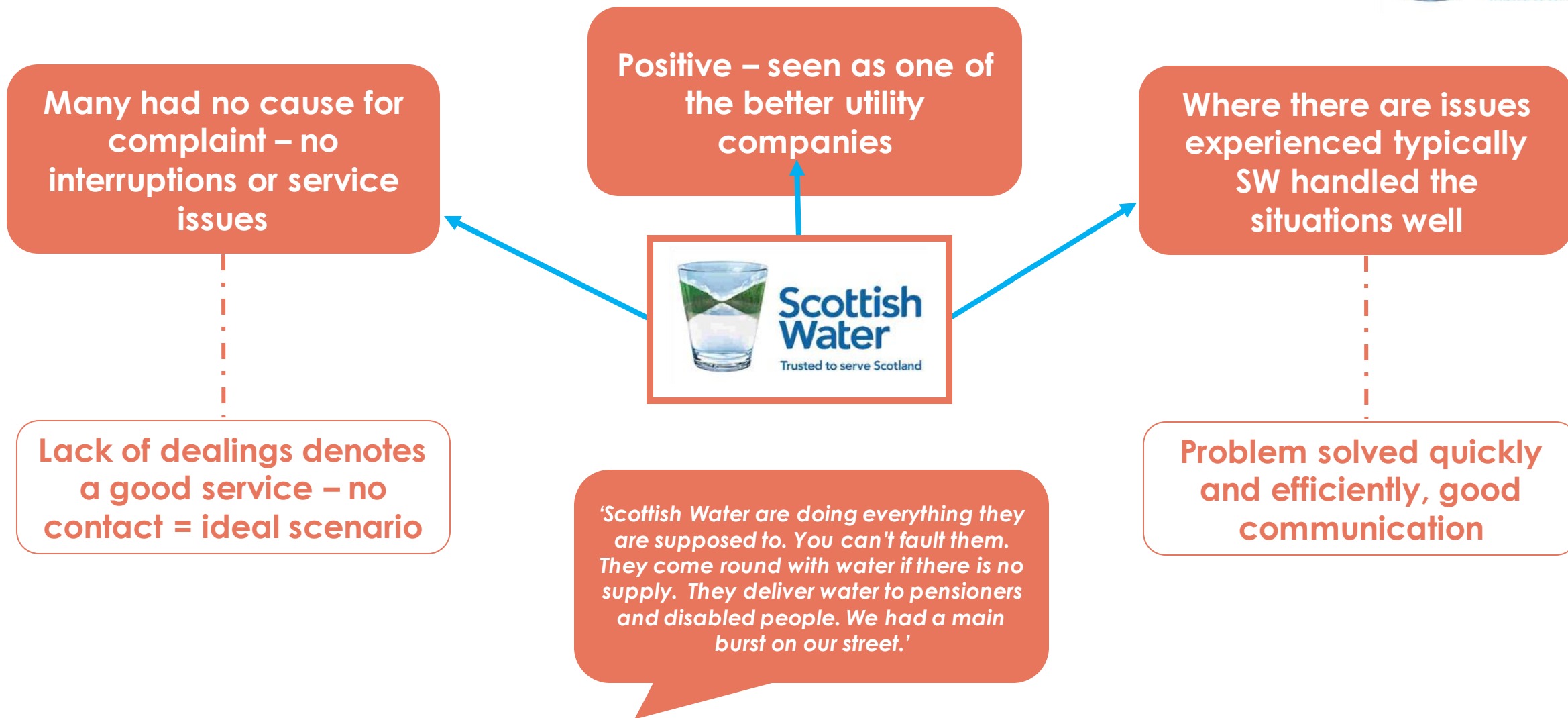
'Scottish Water don't know that I am blind. I have never volunteered that information and they have never asked for it. But it would be good if they did know. My power company knows.'
Customer

'I use utility companies without thinking about them. I don't think they care about us. To be honest I never think about it.'
Customer

'Some of our residents can be very nervous or get quite confused, so we will help them.'
Charity



Perceptions of Scottish Water.



Awareness and use of utilities' registers.

Awareness



Some awareness – typically amongst those who were either disabled or had elderly relatives

Often they find out about it via word of mouth

Those who are visually impaired tend to be on 'Priority registers' for their energy companies

Key insight:

Proactively asking general customer contacts and/or enquiries whether they have additional/medical needs, should be undertaken as a matter of course by the SW call centre, operational enquiries, etc.

Use



British Gas seem to be more known for having a special service for disabled customers

Some felt that utilities have a 'duty of care' towards disabled and elderly customers

Common sense that Scottish Water would have an Additional Support Register. Negligible or non existent awareness currently.

Key insight:

There is a need to advertise/communicate the service to more vulnerable customers, in order to put their minds at ease in case of supply interruption. There was a sense that there are more elderly vulnerable or disabled people living alone nowadays and thus there is a greater need for additional support.

What should the minimum service be?

Service should 'kick in' within 2 to 4 hours

- Most accept that four hours is more realistic unless there is a need for a critical continuous supply

Bottled water should be brought to customers' doors

- A phone call in advance would be made to tell customers SW are coming
- Password would be invaluable here

If possible advance notice by telephone call could help them prepare

- Bottles could be filled with water in advance and thus the SW window for providing bottled water could be extended to 4 to 6 hours

'If I didn't have any water it would be a nightmare for me. I desperately need water. I have a colostomy. I'm happy to tell SW that. I want to go on the register. How do I go about it?'

'If you have mental health issues it doesn't take much to push you over the edge. Not having any water and worrying about it would be enough to push you over.'

Whom should the service benefit?

First Priority	Second Priority	Third Priority
<ul style="list-style-type: none"> Dialysis/kidney problems Registered as visually impaired Mental health Breathing issues (COPD) Mobility issues Water for medication Elderly infirm/housebound Strict hygiene practices Care Support (carers who have to be present at all times) 	<ul style="list-style-type: none"> Audio impaired/hearing impairment Visually impaired/partial visual impairment Low immune system New born/young child in household single parents Cancer patients going through chemotherapy Parents of children with Downs/Autism 	<ul style="list-style-type: none"> Fit elderly Fit elderly with relatives living nearby providing support Non-English speaking

Key insight:

The vulnerable, frail elderly, disabled and those with a clear medical need are the key groups in any prioritisation.

Response to SW's Additional Support Services Register description

Positives



Service was thought to be excellent

Shows that Scottish Water care about their customers

Choice of communication types is key

Key service elements were:-

- Knock and wait scheme
 - Password
- Support with mobility / accessibility
 - Communication options
 - Large print materials
 - Braille or audio
 - Sign language

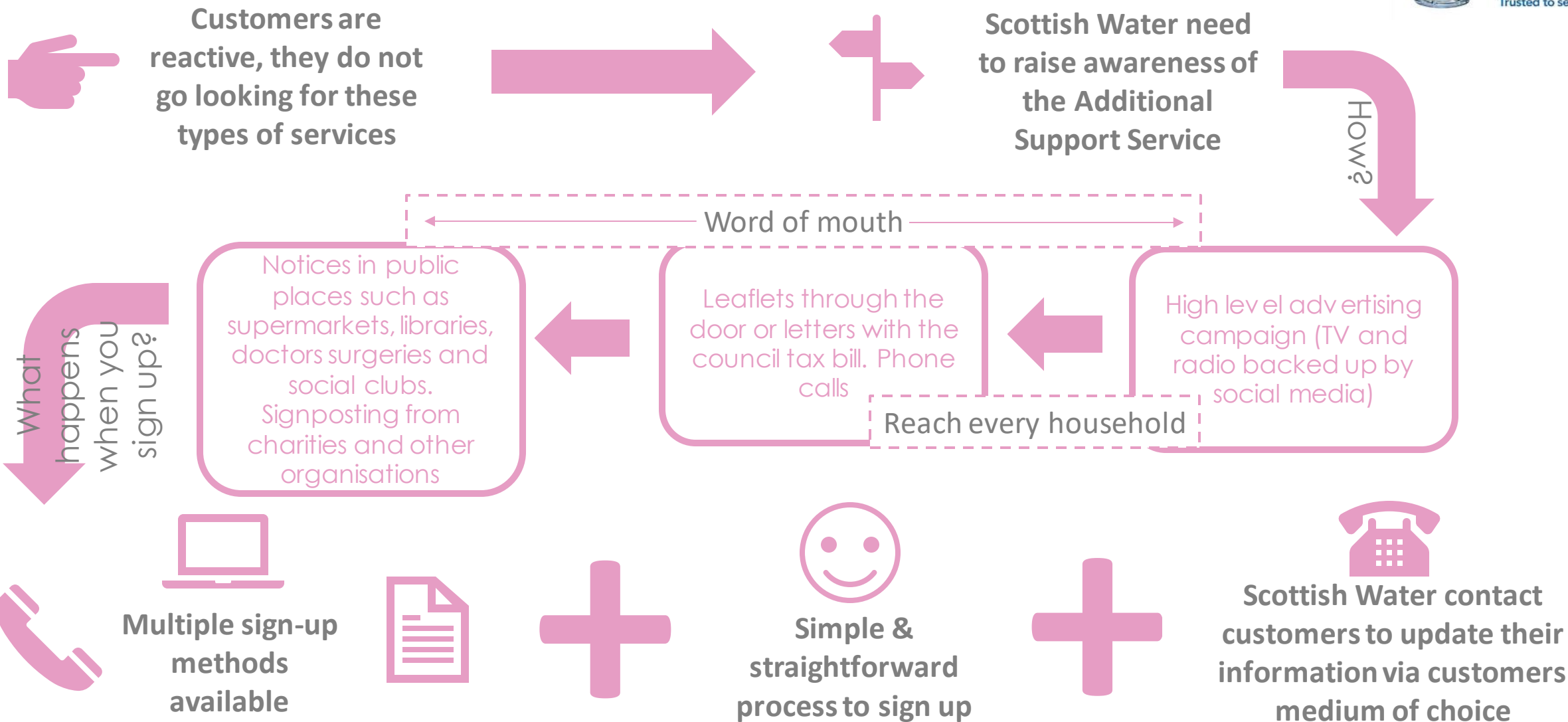
Negatives



Why haven't we heard of it?

'It sounds good. SW are trying to help people. As long as you know people are coming if there is an interruption to the water. It gives you peace of mind. You've got something in place if anything happens.'

Expectations of the Additional Support Service



Name preference for the service



- Used across other utilities, more widely known
- Communicates benefit of the service
- Suggests customers would get priority due to additional needs
- Short and memorable
- More generic

'I think we all understand what Priority Services means. It means that you are priority. They will endeavour to reach you first because you can't carry water or leave the house.'

'Priority Services is a generic term. It's understood by the majority of customers.'



- Less clear
- Long name and difficult to remember



- Associated with children 'at risk'
- Risk associated with danger
- Potentially has stigma attached

Key insight:

The most appropriate name for the service is, "The Priority Service Register".

What type of service should it be?

Share information about
specific need or condition

or

Sign up to a specific service
without the need to share
information about their
disability



Happy to share specific disability i.e. needs codes
but for some their disability is not top of mind and
they did not see themselves as disabled

Key insight:

Given that the majority of customers are happy to share information about their 'needs' and the expectation is that SW will have to prioritise the initial distribution of bottled water, then a 'needs codes' service, would be more appropriate.

Information sharing



Not happy to share information freely with companies or for companies to pass on their details



Majority could see benefit in utilities directly sharing personal information for the different registers but permission must be sought and gained



Advantages

Would provide customers with instant access to additional support registers that they did not otherwise have access to

Benefit to those who are 'hard to reach' who do not leave their homes or have the internet

Disadvantages

SW should not automatically presume that customers are happy for companies to share information

Concerns about phone calls and mail from third parties

Key insight:

Information sharing of eligible customers' data between utility companies must be offered as an option and either accepted, or declined by each customer, themselves, or a designated, responsible adult.



Conclusions & Recommendations

Customers are positive about Scottish Water. They feel lucky to have a plentiful, delicious water supply that they can drink straight from the tap. Indeed, the majority are proud of their water.

Most customers do not know whether SW cares for them or not. Most had no dealings with them and because the water and sewerage bill comes with the council tax bill, they feel they are at a distance to the company.

Generally, customers were positive about SW. The perception was that they were doing a good job and the majority had no dealings with SW, so that must be 'a good thing'.

There was some awareness and experience of additional support services from other utilities. Typically, customers had heard about the registers through word of mouth or from referral agencies such as Occupational Health or Housing Officers. Often customers registered as visually impaired and the frail elderly were aware that they were on registers with energy companies.

There was little or no awareness of SW's Additional Support Register. However, response to the service was overwhelmingly positive.

It was felt that the elderly, frail and disabled customers would benefit from the service most. In particular, the service should focus on delivering to the following ...

- Dialysis/kidney problems
- Visually and audio impaired
- Partially visually impaired and audio impaired
- Frail elderly
- Wheelchair users
- Limited mobility
- Breathing issues (COPD)
- Water for medication
- Strict hygiene practices
- Mental health
- Care support (carers who have to be present at all times within the property, with the person they are caring for)
- New born
- Cancer patients going through chemotherapy

Conclusions & Recommendations

Customers wanted the service to 'kick in' (perhaps unrealistically) within as little as two hours of a service interruption. However, most accepted four hours as more realistic.

The key service elements with the most appeal were...

- Knock and wait scheme/ extra time/password
- Proactive notification of an interruption to supply or water quality issue
- Proactive notification of a sewer flood
- Continuous updates in an ITS
- We support you with things such as carrying bottled water or keeping your driveway clear in the event of a flood – continuous critical supply of water/bottled water priority
- Chosen method of contact
- Braille or audio and large print materials or email for partially sighted
- Designated named contact
- Specialist trained staff and additional presence preferred (e.g. female staff member)

There was less appeal in...

- Translated documents amongst native English speakers, English not as a first language welcome them
- Financial advice
- Panic button
- Bottled water vouchers (though, if these could be given to those who are more mobile, then this was OK)

There was a widespread desire for SW to raise awareness of this important and valuable service through a high-profile advertising campaign, using all media to include TV, radio, social media, leaflets with the council tax bill and a telephone campaign as well as local posters in doctors' surgeries and social clubs.

Customers wanted to sign up through a number of methods...

- Over the phone without the need to go through numerous telephone menus
- Through leaflets through the door
- Letters with their council tax bill
- Through emails



Conclusions & Recommendations

It was understood that SW would have to prioritise their customers so would need to have information about them in order to do so. Most were happy to provide needs codes, which might be more useful to SW in prioritising their customers' needs.

Customers wanted acknowledgement that they had joined the scheme.

Most customers wanted annual updates and for SW to contact them to ask them if they still wanted to be on the register and whether their health status had changed.

Unanimously, customers preferred the name Priority Service Register over Additional Support Register and 'At Risk Register'

Significantly, response to information sharing was not universal. Some customers are strongly opposed to it.

There was a polarised response to information sharing. Many had no issue with utility companies sharing information if there was a clear benefit, i.e., that they would be added automatically to a Priority Services Register.

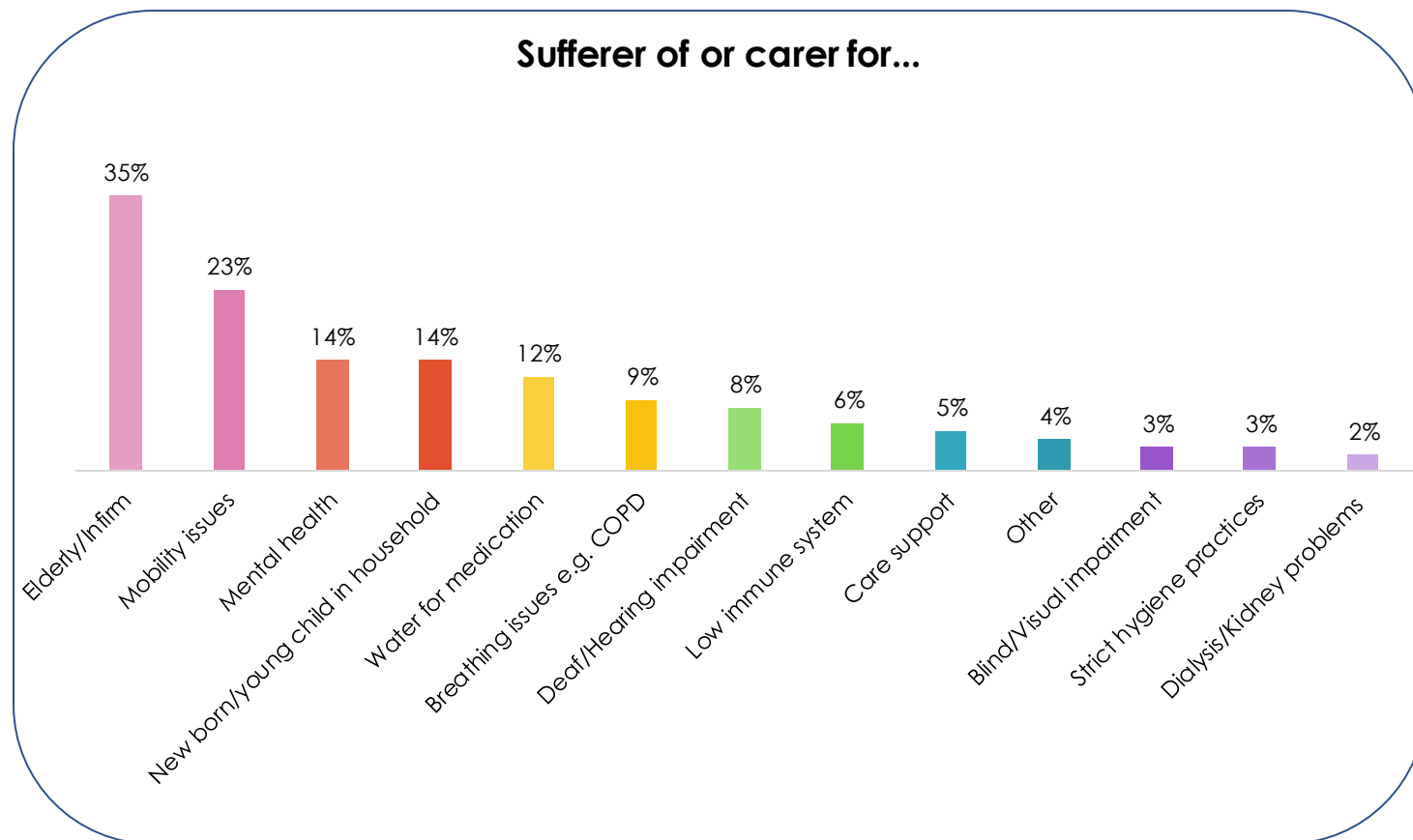
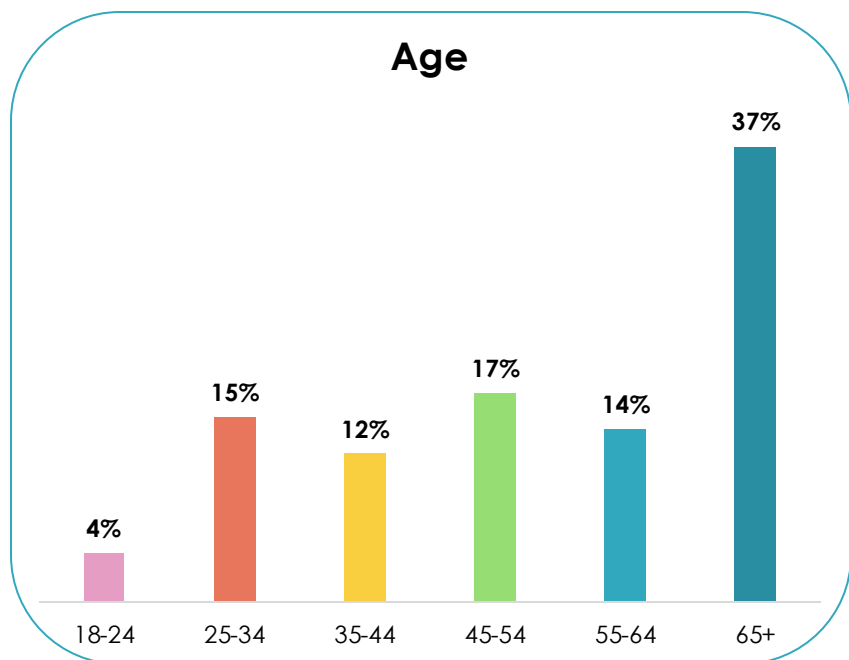
Our recommendation is that SW must ask permission before sharing and are clear about what and how information is being shared, as well as the benefit to the customer i.e. you only need to sign up with one utility to be automatically placed on all registers.



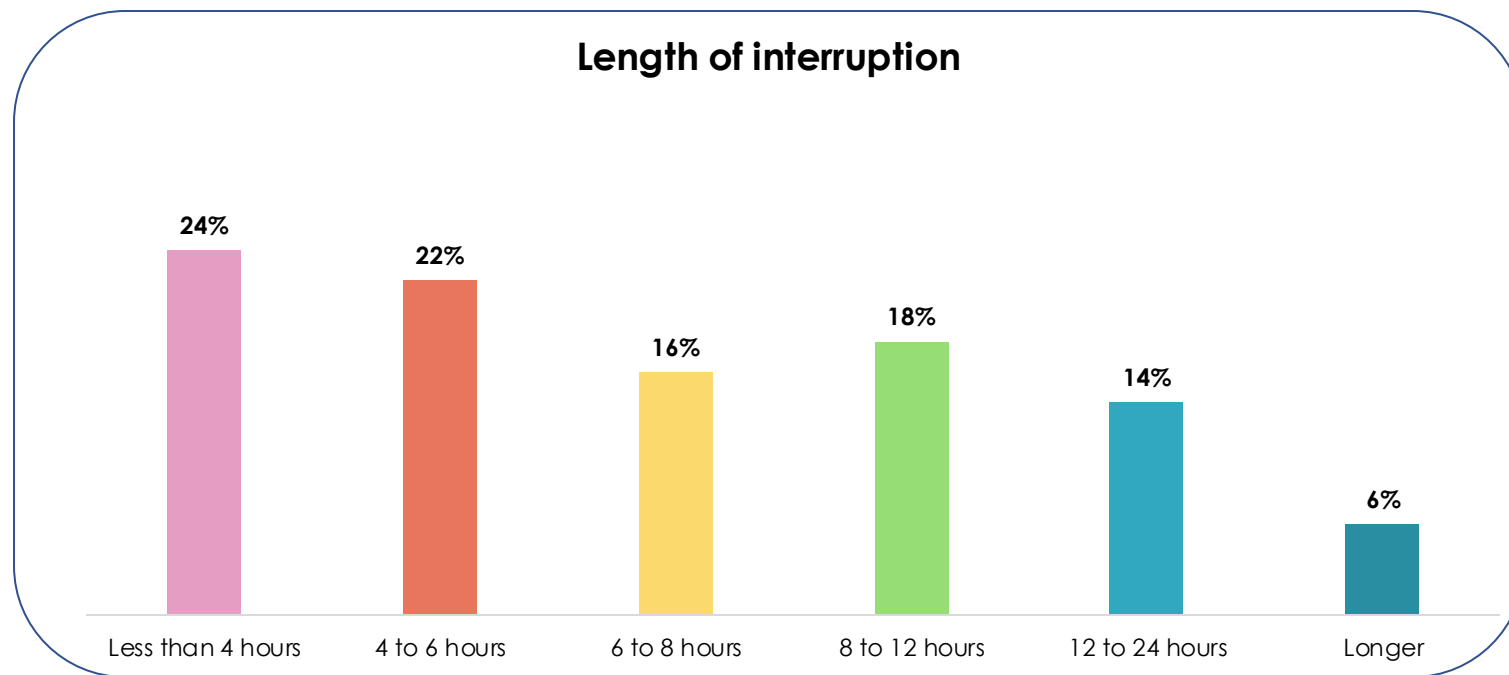
turquoise

Quantitative Research.

Respondent sample

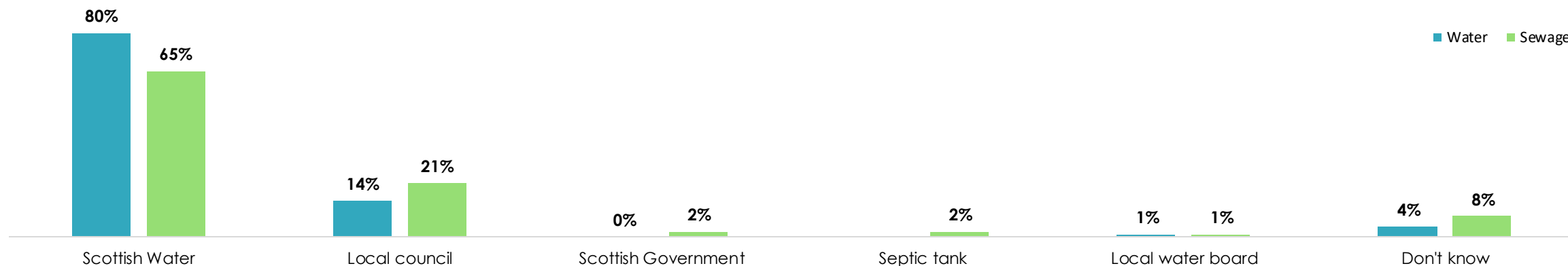


Experience of supply interruption (H2H only)

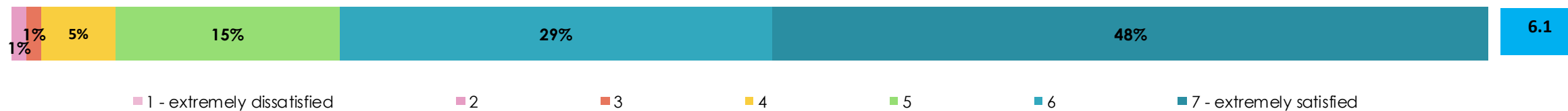


Water and sewage provider

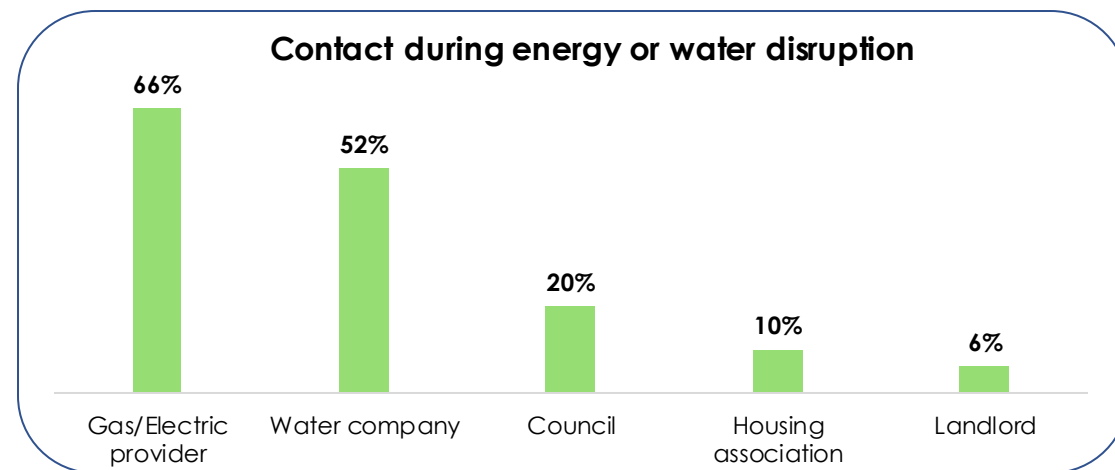
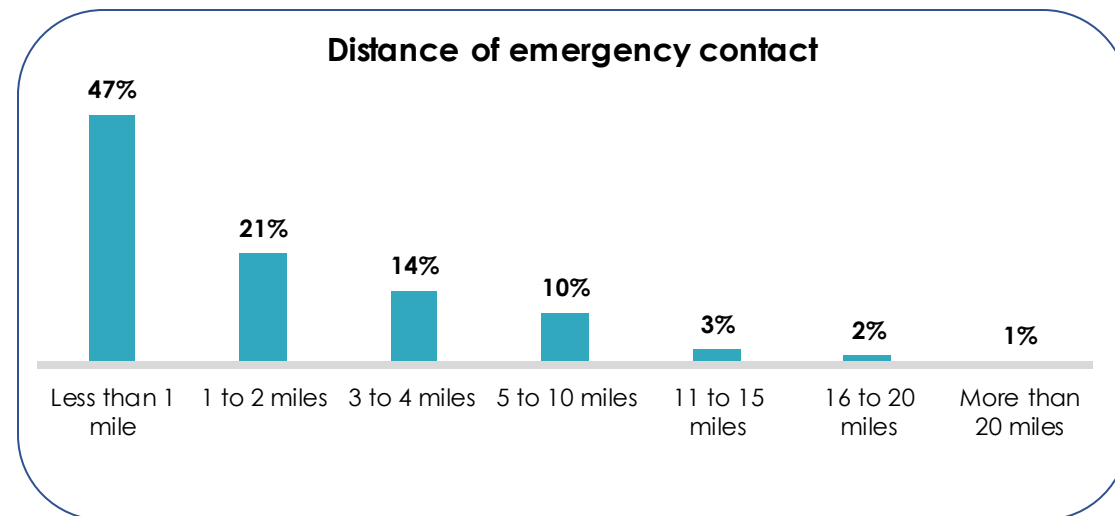
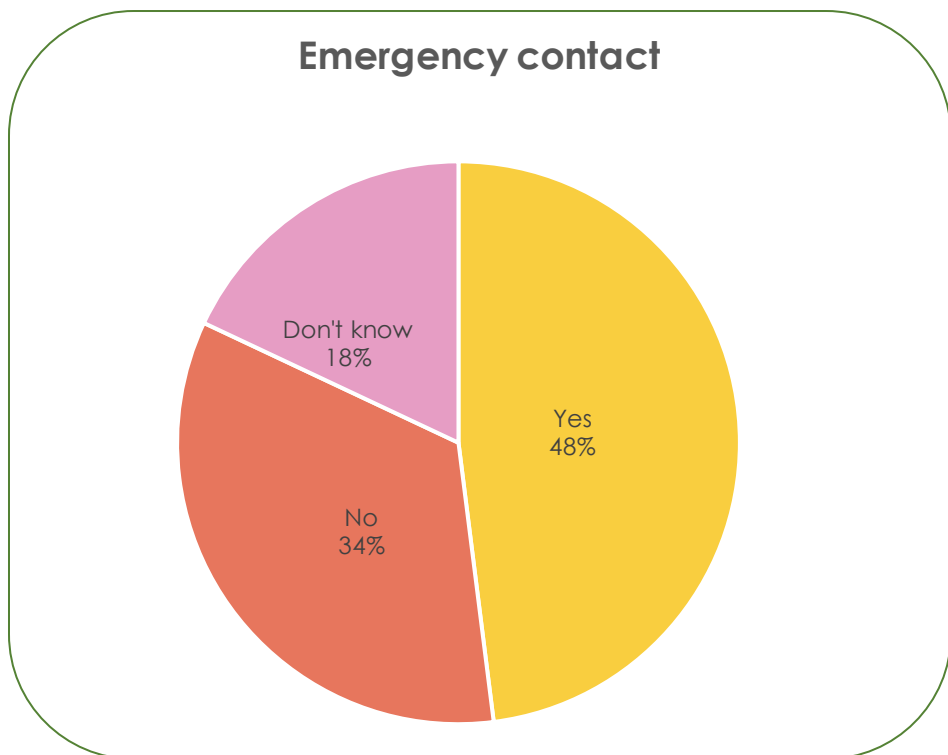
Water and sewage provider



Overall satisfaction with the water and waste water service

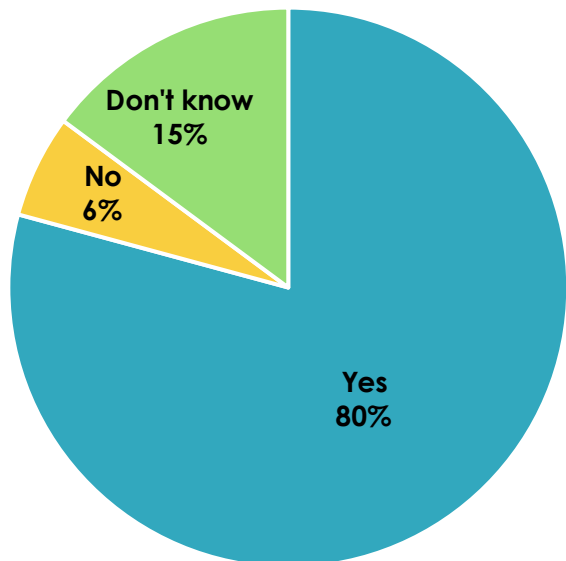


Support Network

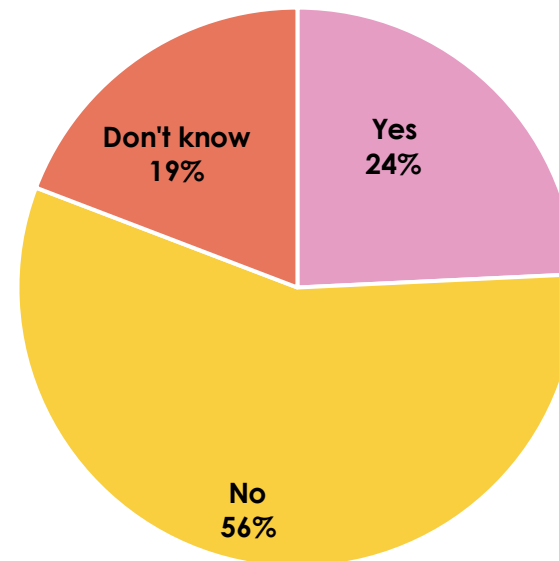


Additional support services

Energy/Water providers should provide extra support services

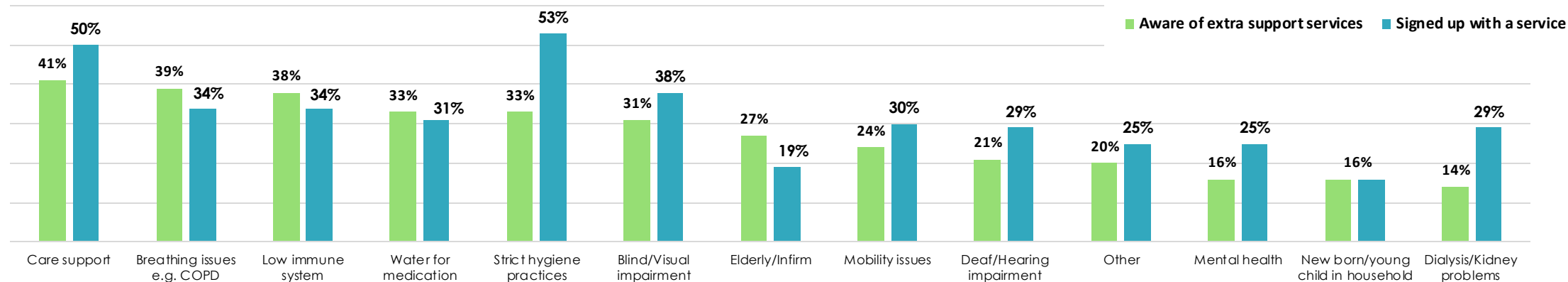


Aware of utility companies offering extra support services

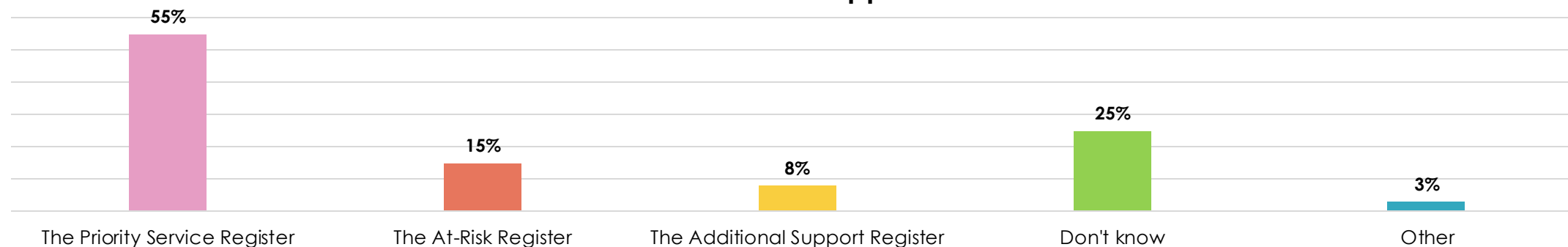


Awareness of additional support services

Aware of utility companies offering extra support services

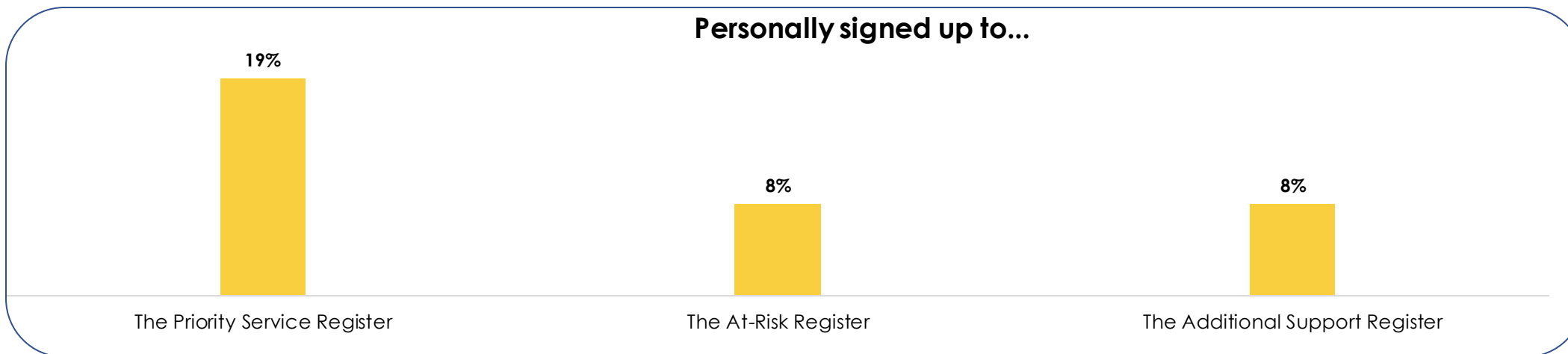


Name of the extra support service

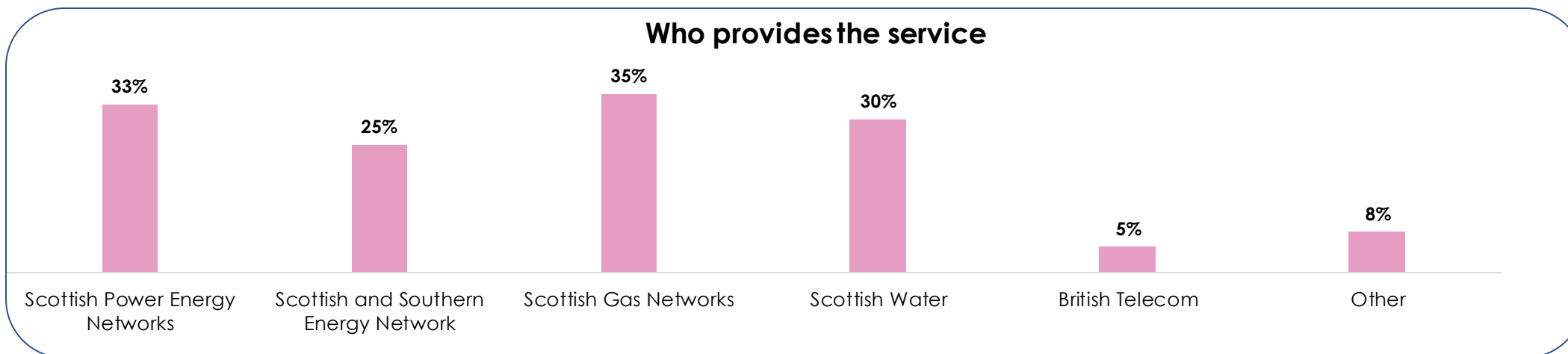


Usage of additional support services

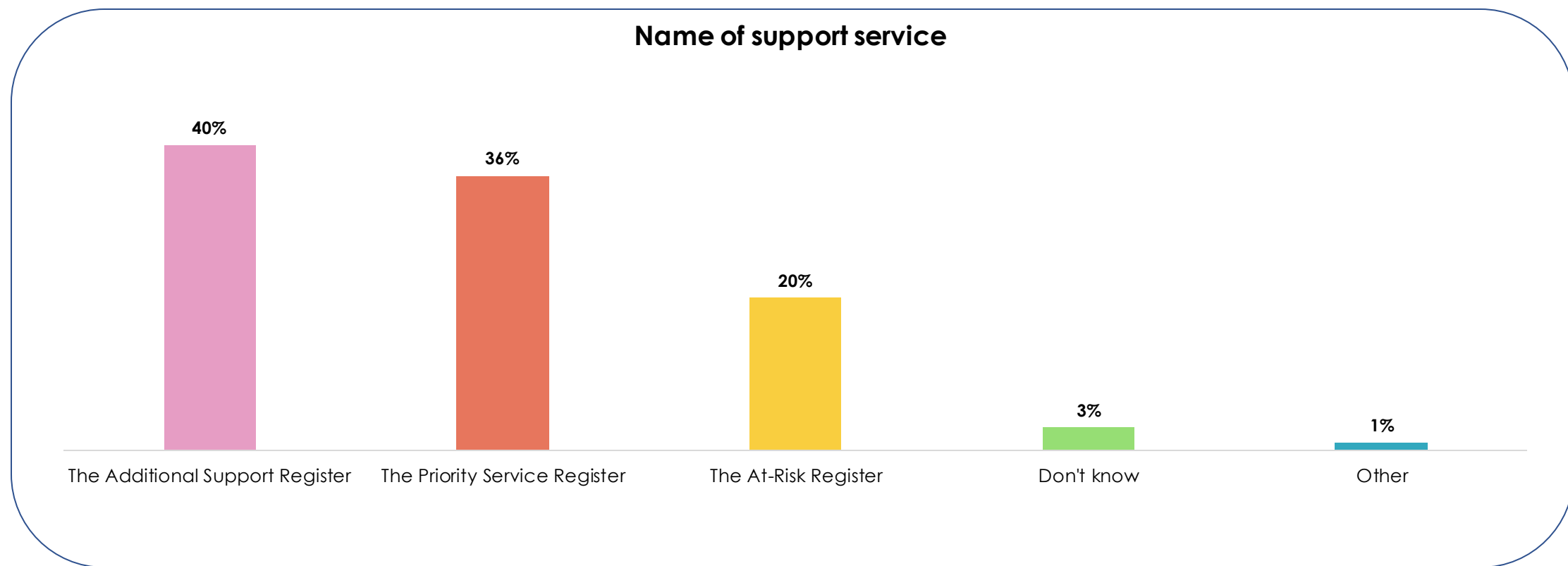
Personally signed up to...



Who provides the service

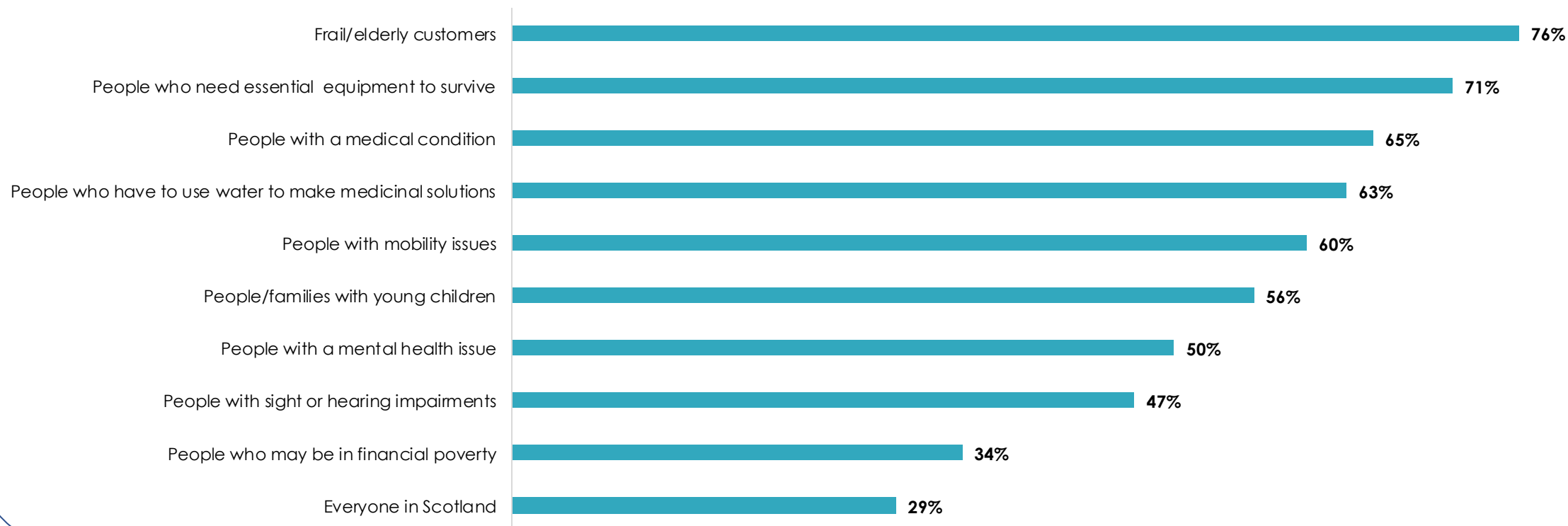


Preferred name for support services



Eligibility for additional support services

Who should be eligible

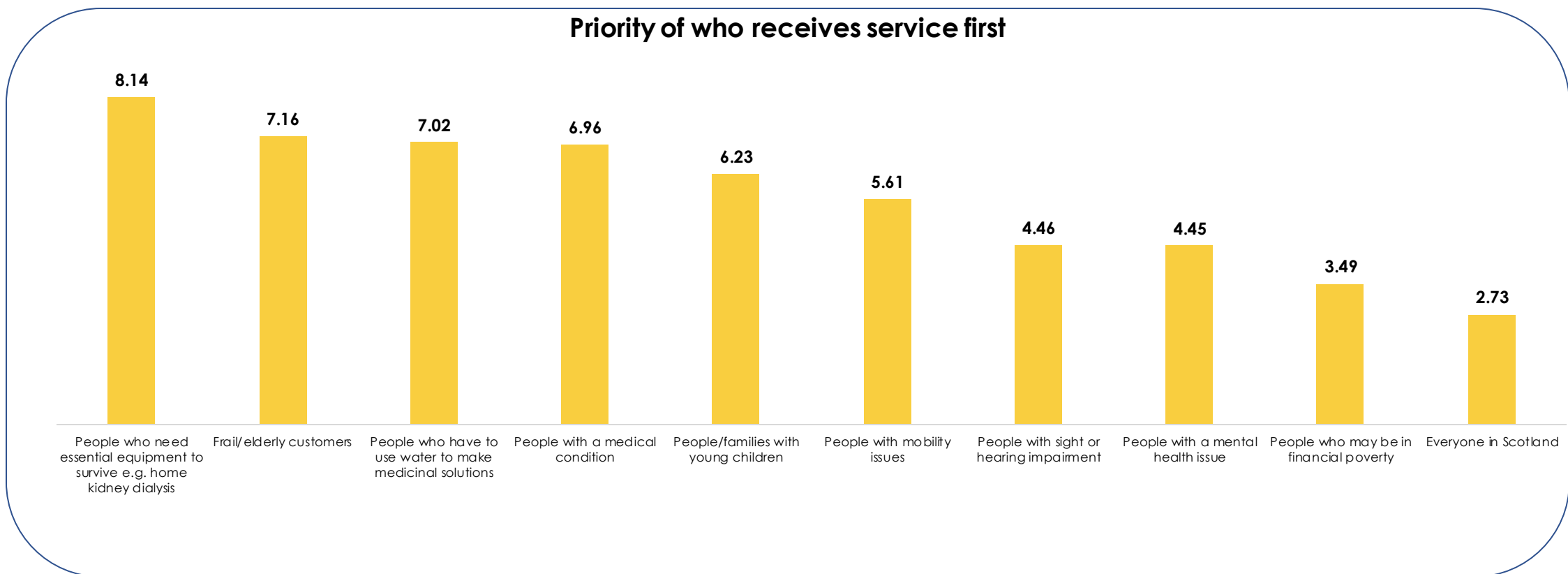


Requirements for additional support service

What should be provided by SW during disruption

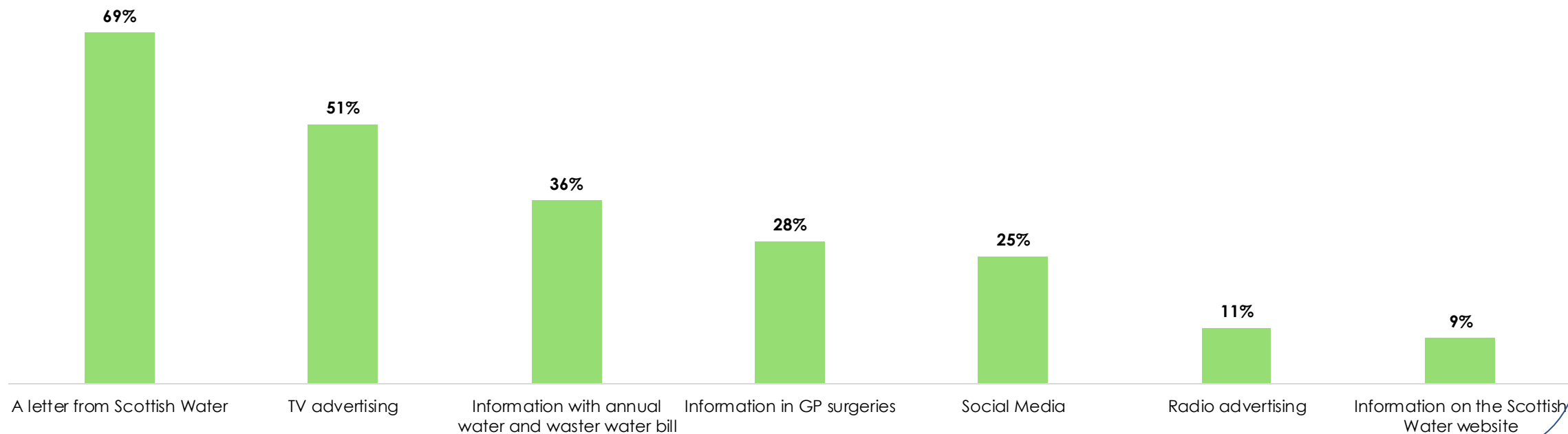


Prioritisation of vulnerable groups



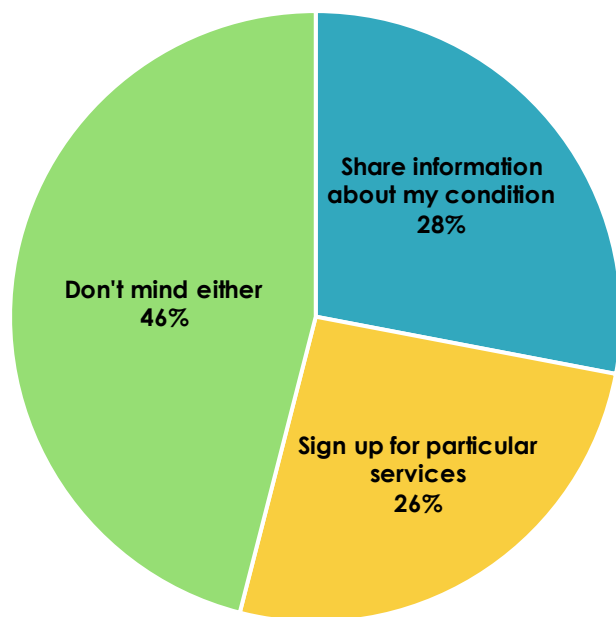
Most effective messaging regarding signing up to a support register

Most attention grabbing media

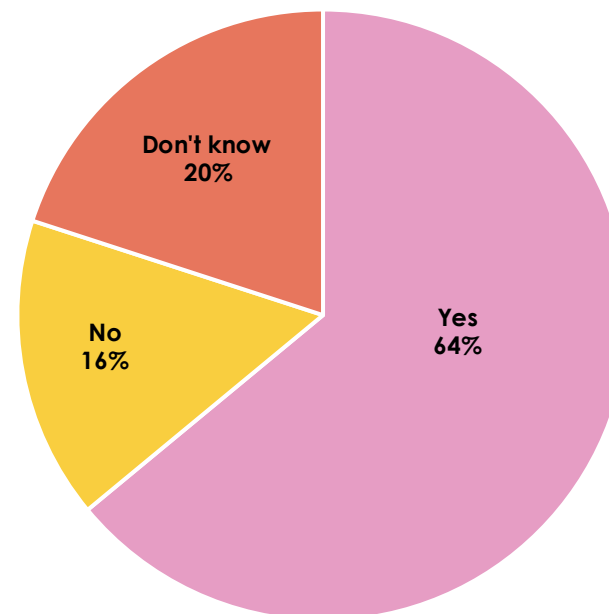


Sharing information

Happy to...

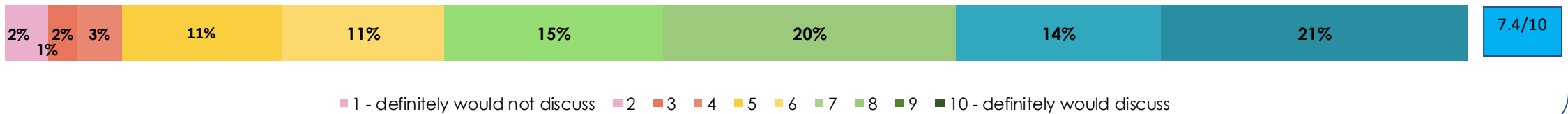


Agree to utility companies sharing information

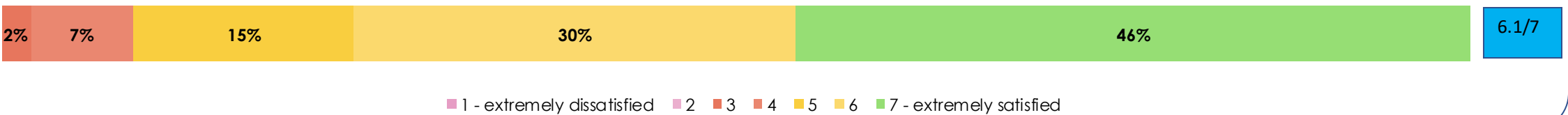


Satisfaction with Scottish Water

Likelihood to positively discuss Scottish Water

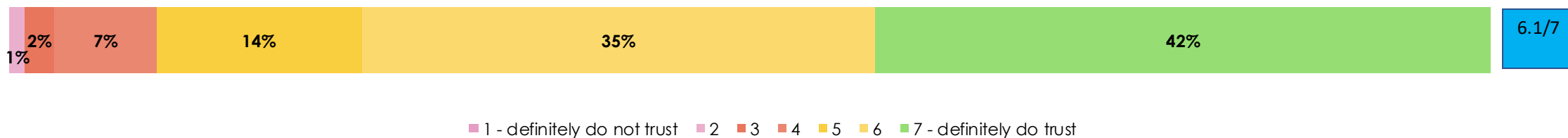


Overall satisfaction with how Scottish Water operate the waste water treatment works

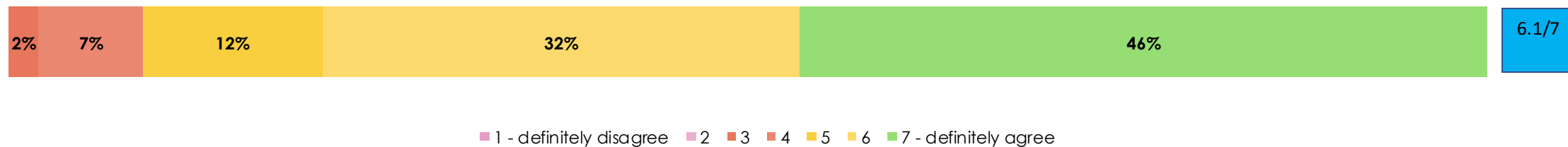


Level of trust in Scottish Water

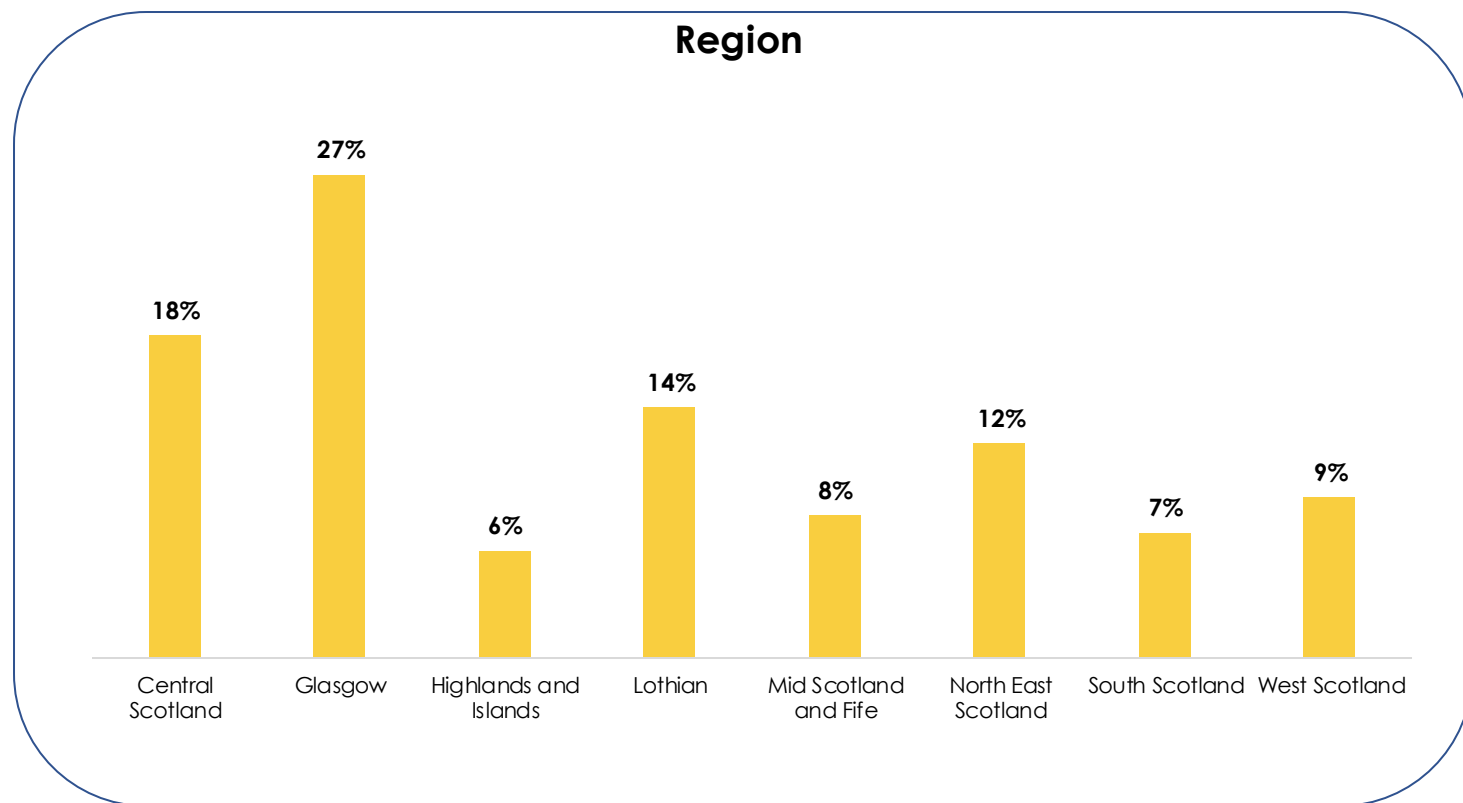
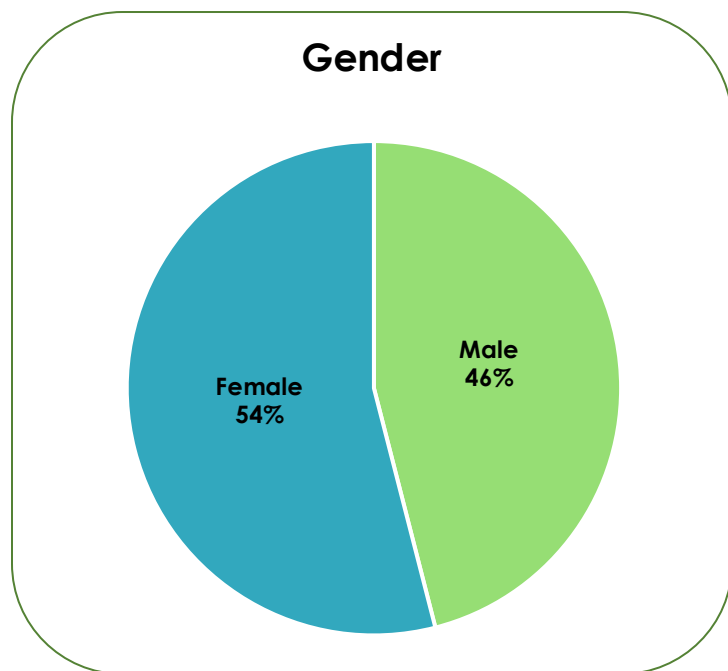
To what extent do you trust Scottish Water



I share the view that Scottish Water is 'trusted to serve Scotland'



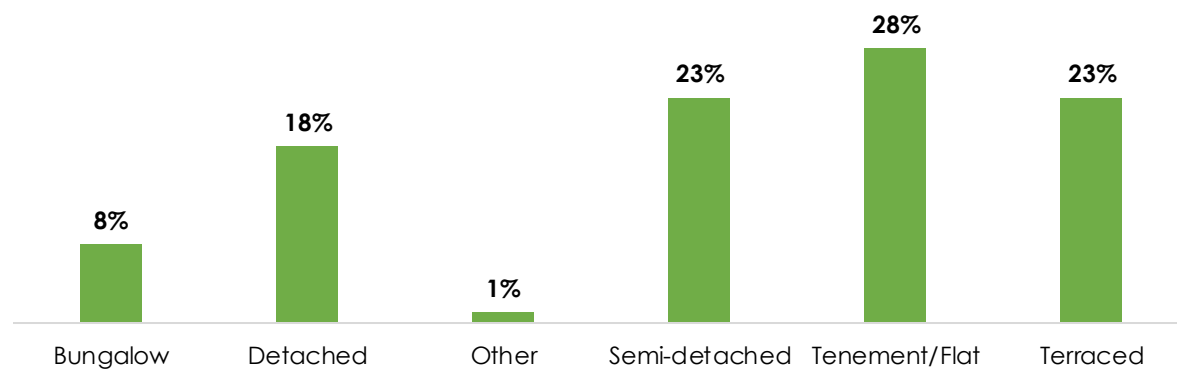
Sample demographics



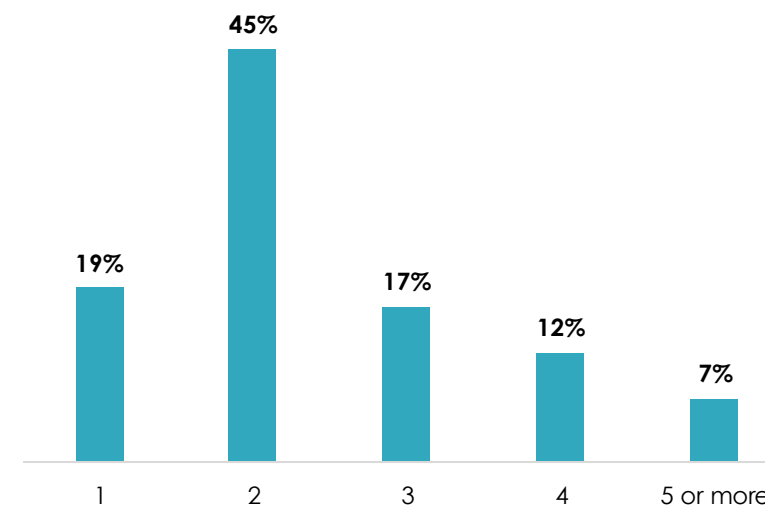
Household



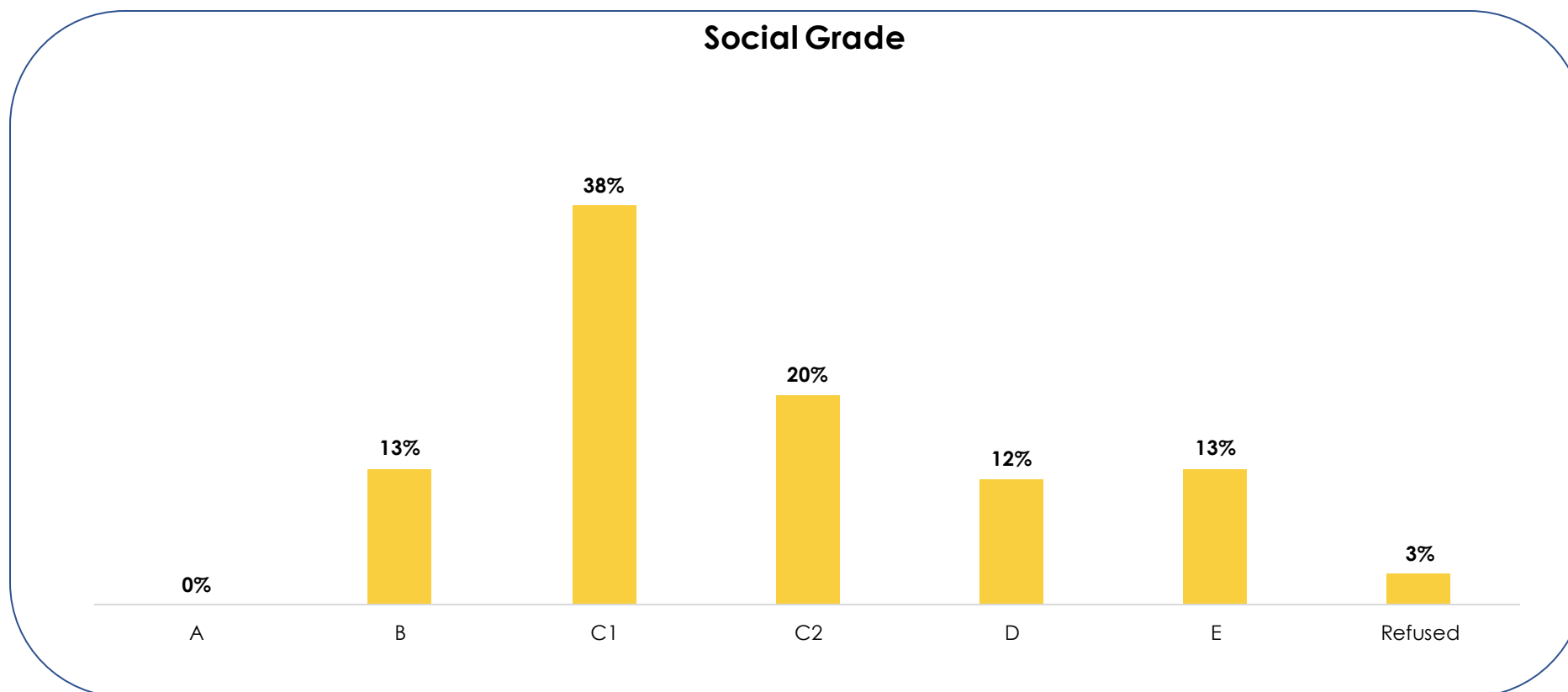
Type of property



Number of people in household



Social grade



CHANGING THE WORLD THROUGH OVER 30 YEARS OF MARKET RESEARCH

30

Years Colourful Experience

Helping clients around the world to think turquoise for 30 years.



Taking a Holistic Approach

Turning black and white research into full colour understanding.



Diverse Sector Coverage

Gathering unbeatable experience in every sector imaginable.



Partnering not Dictating

Connecting on a level you won't experience with any other agency.