



Guernsey Water: Customer Prioritisation Research 2021

September 2021

Alex McCluckie, Research Director

Jamie Lawson, Senior Research Executive

Head office: 3 Pavilion Lane, Strines,
Stockport, Cheshire, SK6 7GH

Leeds office: 2 St. David's Court,
David Street, Leeds, LS11 5QA

+44 (0)1663 767 857
djsresearch.co.uk



JN7387



Contents

- 03** Key findings
- 06** Background & methodology
- 09** Customer prioritisation: MaxDiff analysis
- 17** Attitudes towards Guernsey Water
- 23** Experiences of Guernsey Water
- 26** Appendix: sample profile
- 28** Appendix: MaxDiff

Key findings





Key findings: customer prioritisation

Customers have three key areas which they want Guernsey Water to focus on:

- 1) **Tap water quality – both in terms of safety and sensory properties (i.e. does the water look, smell and taste good)**
- 2) **Business & service efficiency/effectiveness**
- 3) **Environmental impact**

The first area is particularly important to residents, with the two service measures relating to this ('safeguarding tap water quality' and 'supplying drinking water that looks, smells and tastes good') ranking 1st and 2nd in terms of prioritisation among customers. Indeed, their relative importance scores indicate that they are around 2x and 1.5x as important to residents as the 3rd most important measure 'operating a business and services that are efficient and cost effective'.

Meanwhile, service measures such as 'community engagement projects', 'decreasing sewer blockages' and 'customer responses' are seen as the lowest priorities.

Priorities are largely consistent between groups, but there are a few notable differences. 16-39 year olds and 40-59 year olds place a greater emphasis on the environment while cesspit users, perhaps unsurprisingly, prioritise extending the main drain sewer network.

Highest ranking priorities: relative importance scores

| | |
|---|-----|
| Safeguarding tap water quality | 7.8 |
| Supplying drinking water that looks, smells and tastes good | 6.2 |
| Operating a business and services that are efficient and cost effective | 4.1 |

Lowest ranking priorities: relative importance scores

| | |
|-------------------------------|-----|
| Customer responses | 0.4 |
| Decreasing sewer blockages | 0.3 |
| Community engagement projects | 0.2 |



Key findings: attitudes and experiences

The majority of residents are satisfied with Guernsey Water (66%) and dissatisfaction is limited (7%). However, it should be noted that cesspit customers are around three times as likely to report being dissatisfied than main drain customers (16% cf. 5%).

Around seven in ten residents feel that Guernsey Water is a company that they can rely on (71%) while around six in ten feel that they can trust the company (62%) and that it cares about the island (57%). Again, cesspit users are more likely than main drain customers to respond negatively to these statements.

There is a reasonable base level of knowledge of Guernsey Water among residents, with just one in five agreeing with the statement 'I don't know much about Guernsey Water' (20%). Encouragingly, just under half of this group would like to learn more.

Three-quarters of residents (75%) have experienced a water related issue in the past year, and this is most commonly seeing pollution/seeing a warning about pollution in bathing waters. One in four (25%) of these residents contacted Guernsey Water and those that did are largely positive about the customer service they received. Just under two-thirds rate this as either 'good' or 'very good' (63%) while one in ten rate it as 'poor' or 'very poor' (11%).

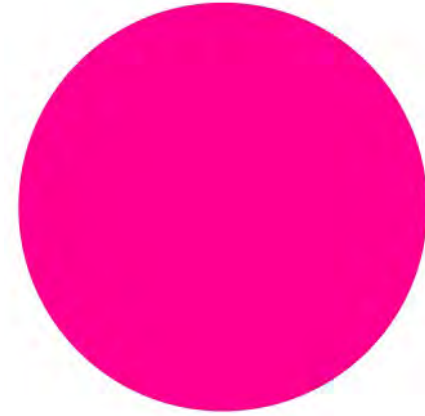
66%

**Satisfied with
the service
provided by
Guernsey Water**

57%

**Agree that
Guernsey Water
cares about the
island**

Background & methodology





Background & methodology

Guernsey Water is updating their business plan to cover the period 2020-2025. To help inform this, Guernsey Water commissioned DJS Research to design and implement a research programme to explore customers' priorities and expectations.

Stage 1: focus groups

To help inform the design of the quantitative phase, DJS Research conducted four focus groups with customers to explore Guernsey Water's seven core outcomes and their respective service measures. To ensure that participating customers were broadly representative, a mix of ages and customer types (i.e. cesspit/main drain) were recruited. Each core outcome and the service measures which comprise it were explored in turn, giving an initial view of customer comprehension and prioritisation. Ultimately, this helped to craft the attributes which were subsequently fed into a quantitative online survey (see overleaf).





Background & methodology

Stage 2: quantitative survey

Building on the findings from stage one, an online survey was developed to assess residents' prioritisation of service measures as well as their wider feelings regarding Guernsey Water.

The survey was disseminated by Guernsey Water via an open link through social media channels and was open to all adult (16+) residents of Guernsey, regardless of their bill paying status. This non-restrictive approach helped to ensure that a wide range of views were captured, allowing for a well-rounded view of service measure prioritisation. To encourage participation, entry into a free prize draw to win an iPad was offered. The survey was open from 19th August 2021 – 9th September 2021.

In total, 368 responses were received. Results were then weighted by age and gender against Guernsey's 2019 demographics to make them representative of the population as a whole (see appendix for further details).

Statistical reliability

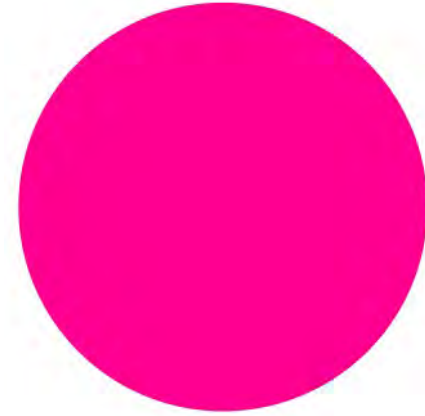
A sample size of 368 gives a sampling error of +/- 5.1% based on a statistic of 50% at the 95% confidence interval. This means, for example, if we found a score of 50% within the survey, we can be 95% confident that this figure lies between 44.9% and 55.1% had we interviewed every adult resident in Guernsey*.



*This should be treated as indicative only given the self-selecting nature of the sample and its skew towards bill-payers.

Customer prioritisation

MaxDiff analysis





What is MaxDiff?

- **Maximum Difference Analysis (MaxDiff)** is one of the 'discrete choice' statistics tools. The MaxDiff process asks respondents to pick out a service measure (helping vulnerable customers, protecting the environment etc.) as the '**most**' important from within a list and one that is '**least**'.
- This is in contrast to standard question formats, like rating questions, where we ask respondents to tell us what they think are the priorities for their water company, and we often find that people say **everything** is important.
- With MaxDiff, we obtain not only **greater discrimination** between all of the elements tested, but also **the relative degree** to which they are seen as important.

How does MaxDiff work?

Using the MaxDiff methodology, respondents are asked to select the "most" and "least" important priorities over the next 3-5 years from a subset of five service measures. The process involves the question being repeated seven times with the subset of features changing each time.

A logistic model technique is used to estimate the relative weights (share of preference) given to each feature. The relative weights are calculated using the model coefficients. The exponential value of the coefficient (also known as the Odds Ratio - OR) is used.

This allows us to compare how much "more" important one feature is versus another and how much "less".



MaxDiff methodology

N=368 Guernsey residents completed the MaxDiff exercise. Across all respondents, we have **12,880** choices made. Each of the 25 different features were shown around 500 times each.

**368
online
interviews**

Example subset

| Most important | Feature | Least important |
|----------------|---|-----------------|
| | Timely and reliable customer responses | |
| | Encouraging biodiversity and creating space for public recreation | |
| | Community engagement projects | ✓ |
| | Staff health & safety | |
| ✓ | Protecting the environment from wastewater pollution | |

Further details on the list of service measures can be found in the appendices.

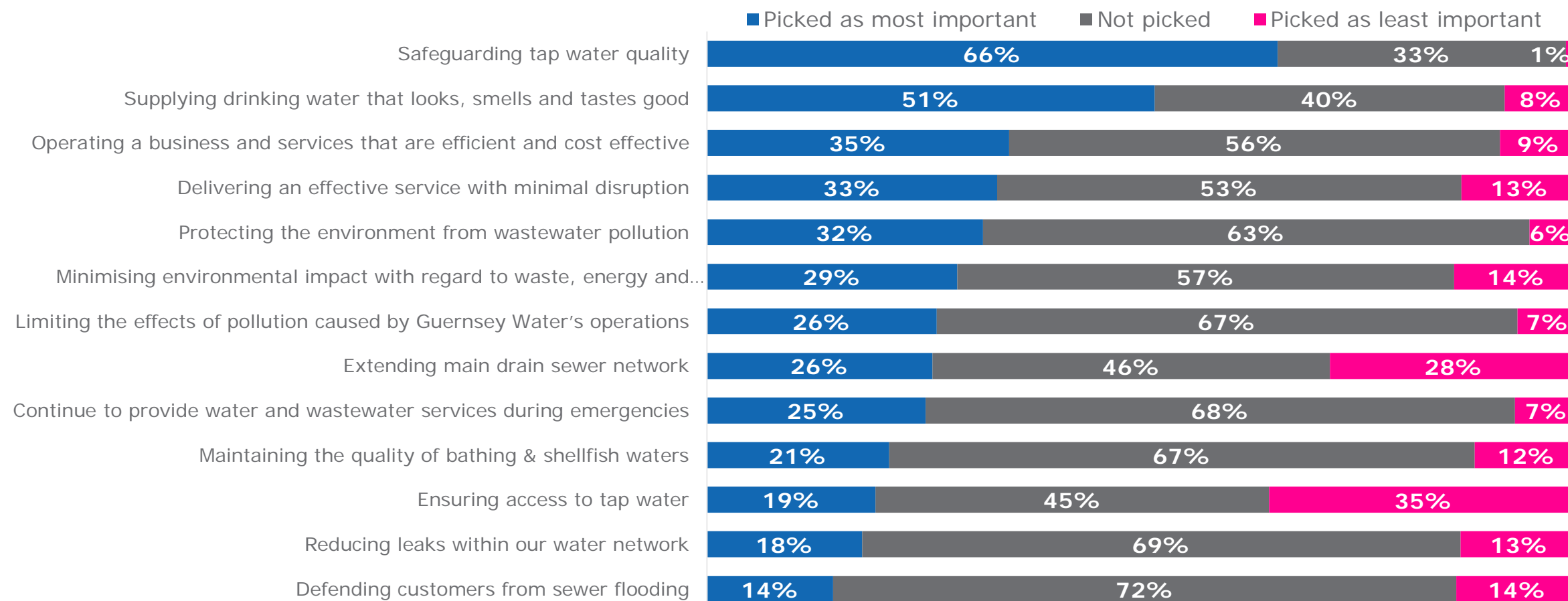
Full list of service measures

| | |
|--|---|
| Ensuring overall customer satisfaction | Limiting the effects of pollution caused by Guernsey Water's operations |
| Timely and reliable customer responses | Maintaining the quality of bathing & shellfish waters |
| Delivering an effective service with minimal disruption | Minimising environmental impact with regard to waste, energy and carbon |
| Supporting vulnerable customers | Encouraging biodiversity and creating space for public recreation |
| Community engagement projects | Reducing leaks within our water network |
| Safeguarding tap water quality to protect public health | Managing and limiting service interruptions |
| Supplying drinking water that looks, smells and tastes good | Lowering the risk of future water restrictions |
| Ensuring access to tap water by extending our drinking water network and providing refill points | Providing good water pressure |
| Defending customers from sewer flooding | Continue to provide water and wastewater services during emergencies |
| Reducing sewer collapses | Operating a business and services that are efficient and cost effective |
| Decreasing sewer blockages | Having a happy and productive workforce |
| Protecting the environment from wastewater pollution | Staff health & safety |
| Extending our main drain sewer network to more customers | |



Frequency of choice: ranked by most picked (I)

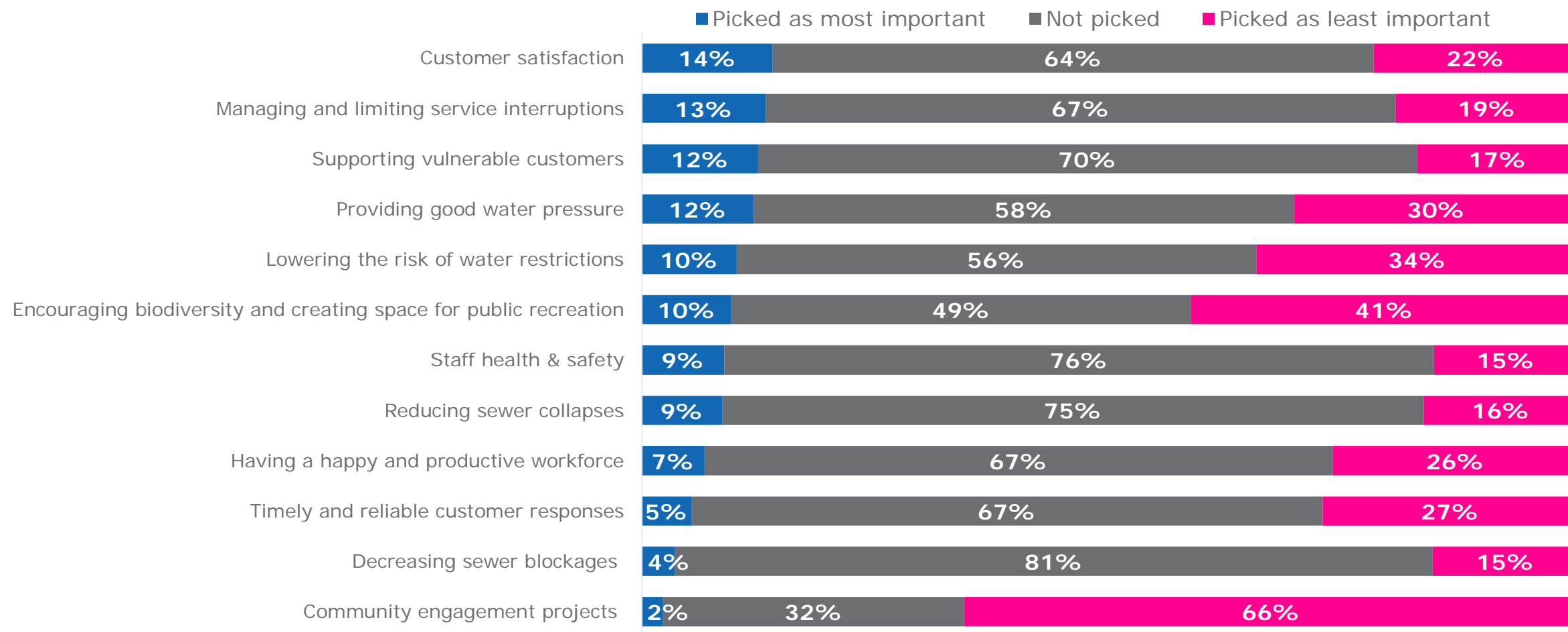
'Safeguarding tap water quality' is the service measure most commonly selected as the most important priority. Meanwhile, residents are divided over measures such as 'extending the main drain sewer network' and 'ensuring access to tap water'.





Frequency of choice: ranked by most picked (II)

Community engagement projects are overwhelmingly picked as the least important service measure.





Relative importance

Converting these results into a measure of relative importance reveals that 'safeguarding tap water quality' (7.8) is nearly twice as important to residents as the third most important service measure, 'operating a business and services that are efficient...' (4.1). Similarly, 'supplying drinking water that looks, smells and tastes good' is around one and a half times more important compared to the third ranking measure.

Most important



Least important



Relative importance: thematic analysis

Some key themes are evident when focussing in on residents' top priorities.

Key themes

Tap water quality

Service measures concerning the quality of tap water, in terms of both safety and sensory properties, are clearly the most important.

Business & service efficiency/effectiveness

The next most important measures concern business efficiency and effective service delivery.

Environment impact

Broad service measures concerning reducing Guernsey Water's impact on the environment comprise the next three most important priorities. Other service measures which impact the environment but are less explicit/more specific do not perform as well (e.g. decreasing sewer blockages rank 23rd score 0.3).

Top 7 priorities



Safeguarding tap water quality

7.8

Supplying drinking water that looks, smells and tastes good

6.2



Operating a business and services that are efficient and cost effective

4.1

Delivering an effective service

3.7



Protecting the environment from wastewater pollution

3.4

Minimising environmental impact with regard to waste, energy and carbon

3.2

Limiting the effects of pollution caused by Guernsey Water's operations

2.8

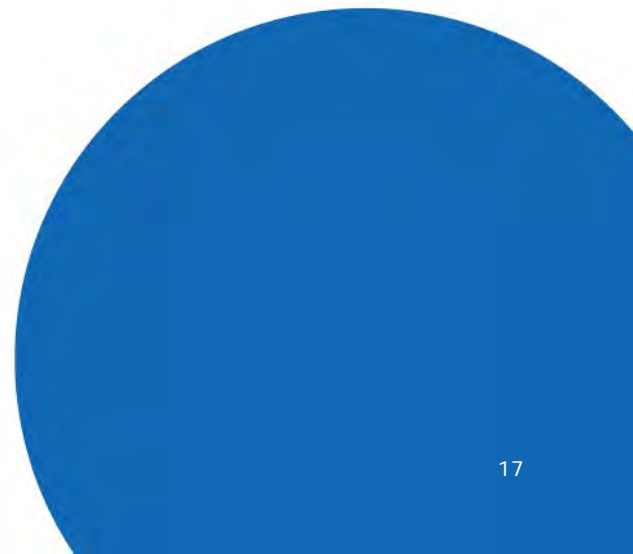
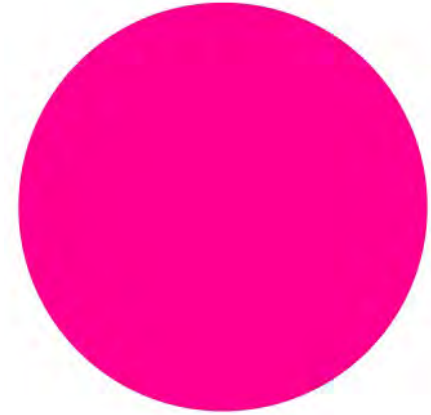


Relative importance: subgroups

Residents' top priorities are largely similar across subgroups, but there are some subtle differences. For instance, the two younger age groups prioritise environmental service measures while cesspit users place more emphasis on extending the main drain sewer network. Interestingly, priorities are largely consistent by water supply type and gender.

| | Total | 16-39 year olds | 40-59 year olds | 60+ year olds | Main drain | Cesspit |
|-----|---|---|---|---|---|---|
| 1st | Safeguarding tap water quality | Safeguarding tap water quality | Safeguarding tap water quality | Safeguarding tap water quality | Safeguarding tap water quality | Safeguarding tap water quality |
| 2nd | Supplying drinking water that looks, smells and tastes good | Supplying drinking water that looks, smells and tastes good | Supplying drinking water that looks, smells and tastes good | Supplying drinking water that looks, smells and tastes good | Supplying drinking water that looks, smells and tastes good | Supplying drinking water that looks, smells and tastes good |
| 3rd | Operating a business and services that are efficient and cost effective | Minimising environmental impact with regard to waste, energy and carbon | Operating a business and services that are efficient and cost effective | Operating a business and services that are efficient and cost effective | Operating a business and services that are efficient and cost effective | Extending main drain sewer network |
| 4th | Delivering an effective service | Operating a business and services that are efficient and cost effective | Protecting the environment from wastewater pollution | Delivering an effective service | Delivering an effective service | Delivering an effective service |

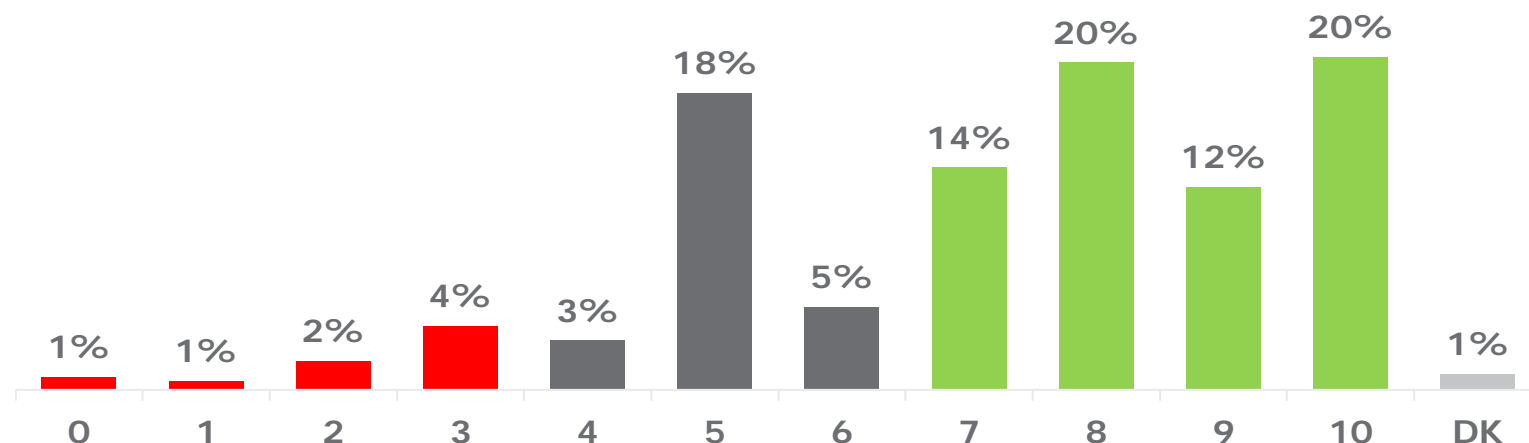
Attitudes towards Guernsey Water





Overall satisfaction with Guernsey Water

On the whole, Guernsey residents are largely positive about the company, with two-thirds (66%) declaring that they are satisfied while only 7% are dissatisfied. Meanwhile, a substantial proportion of residents are indifferent (26%).



Dissatisfied

7%

Neutral

26%

Satisfied

66%



Those who have experienced a water related issue in the past year are significantly less likely to be satisfied (63%).



Cesspit users are more than three times more likely to be dissatisfied compared to main drain customers (16% cf. 5%).



Sentiment is particularly positive among those with no responsibility for paying the bill (80%).



Reasons for satisfaction score

Cesspit issues and complaints about price are the main reasons for dissatisfaction with Guernsey Water. Meanwhile, the most common reason for being satisfied is never experiencing any issues.

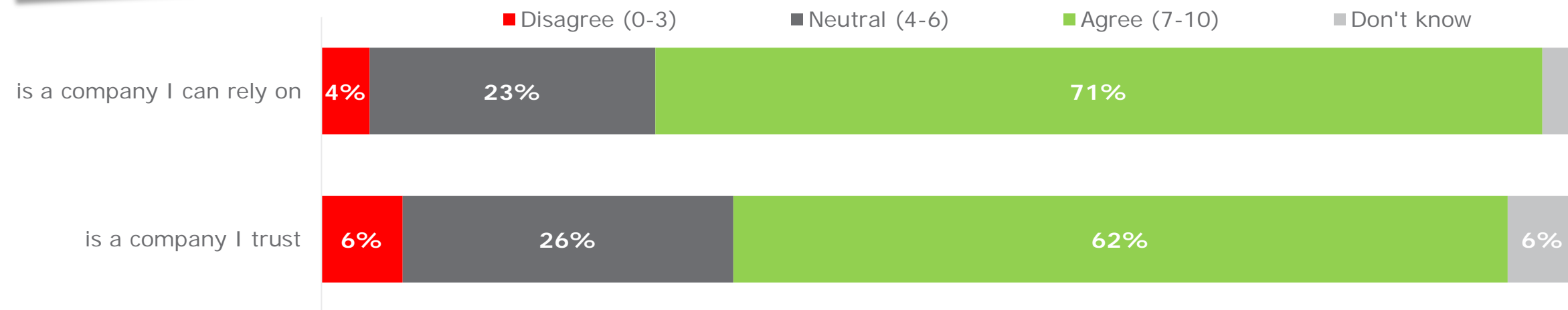




Perceptions of trust and reliability

The majority of residents feel that they can rely on and trust Guernsey Water. Encouragingly, negative sentiments for these two metrics are very limited.

Guernsey Water...



Those aged 16-39 are less likely to feel that they can't trust Guernsey Water (2%) compared to those aged 40-59 (9%) and 60+ (8%).



Compared to main drain customers, cesspit users are more likely to disagree that they can rely on (9% cf. 2%) or trust Guernsey Water (13% cf. 5%)



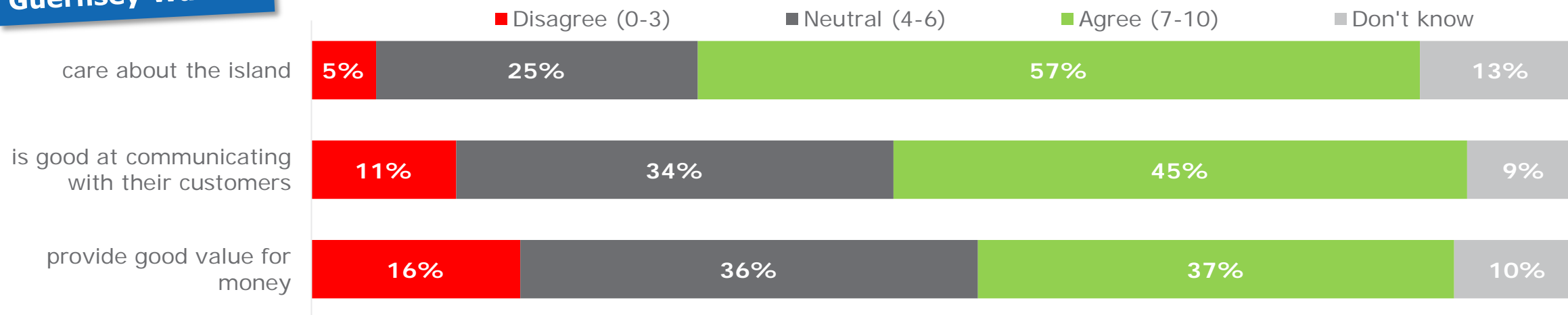
Perhaps unsurprisingly, those who struggle to pay the bills are more likely to disagree with both of these statements (9% & 11% respectively).



Perceptions of care for the island & customers

A majority of residents believe that Guernsey Water care about the island, but there is less positivity regarding communication with customers and providing good value for money. The latter seems to be a particularly important metric given its strong association with overall satisfaction.

Guernsey Water...



Cesspit users are more likely to disagree that Guernsey Water cares about the island compared to main drain customers (10% cf. 4%)



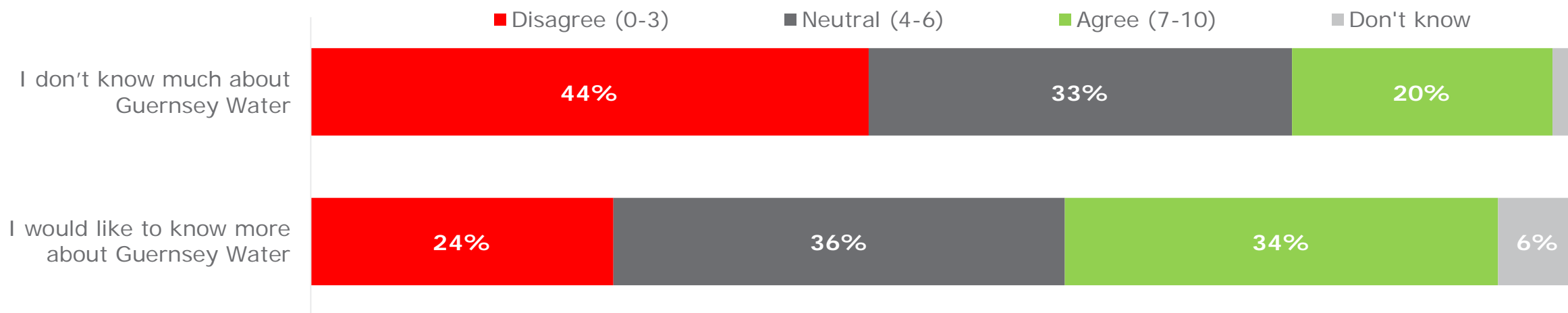
Those who have contacted Guernsey Water about an issue are nearly twice as likely to disagree that the company is good at communicating with customers (22% cf. 12%)

93% of those who agree that Guernsey Water provide good value for money report that they are satisfied with the company overall.



Knowledge of Guernsey Water

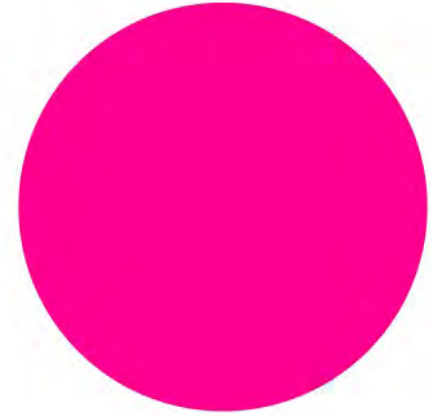
There is a decent base level of knowledge of Guernsey Water among customers, with just one in five agreeing that they don't know much about Guernsey Water. Furthermore, only a small group are outright opposed to learning more about the company (24%).



Younger (16-39) and older (60+) residents are less likely to agree that they don't know much about Guernsey Water (14% & 16% respectively) while 40-59 year olds are more likely to agree (30%). The youngest age group is particularly confident in their knowledge of the company, with 57% disagreeing that they don't know much.

Encouragingly, there is some appetite among those with low knowledge of Guernsey Water to learn more. Just under half of this group agree that they would like to know more, while just 16% disagree.

Experiences of Guernsey Water

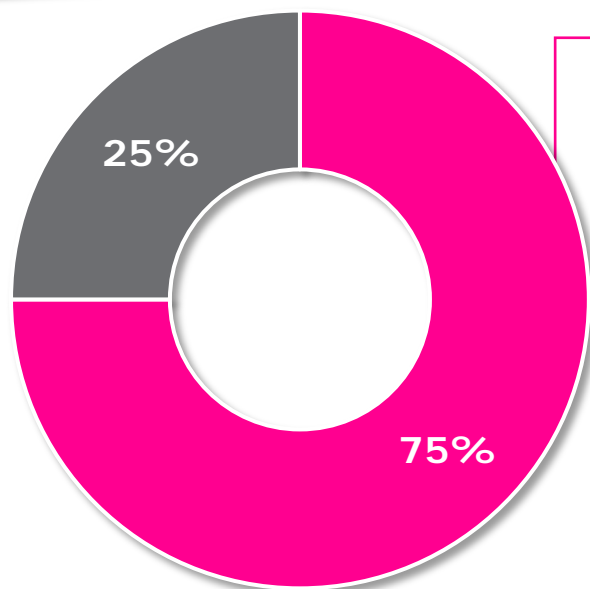




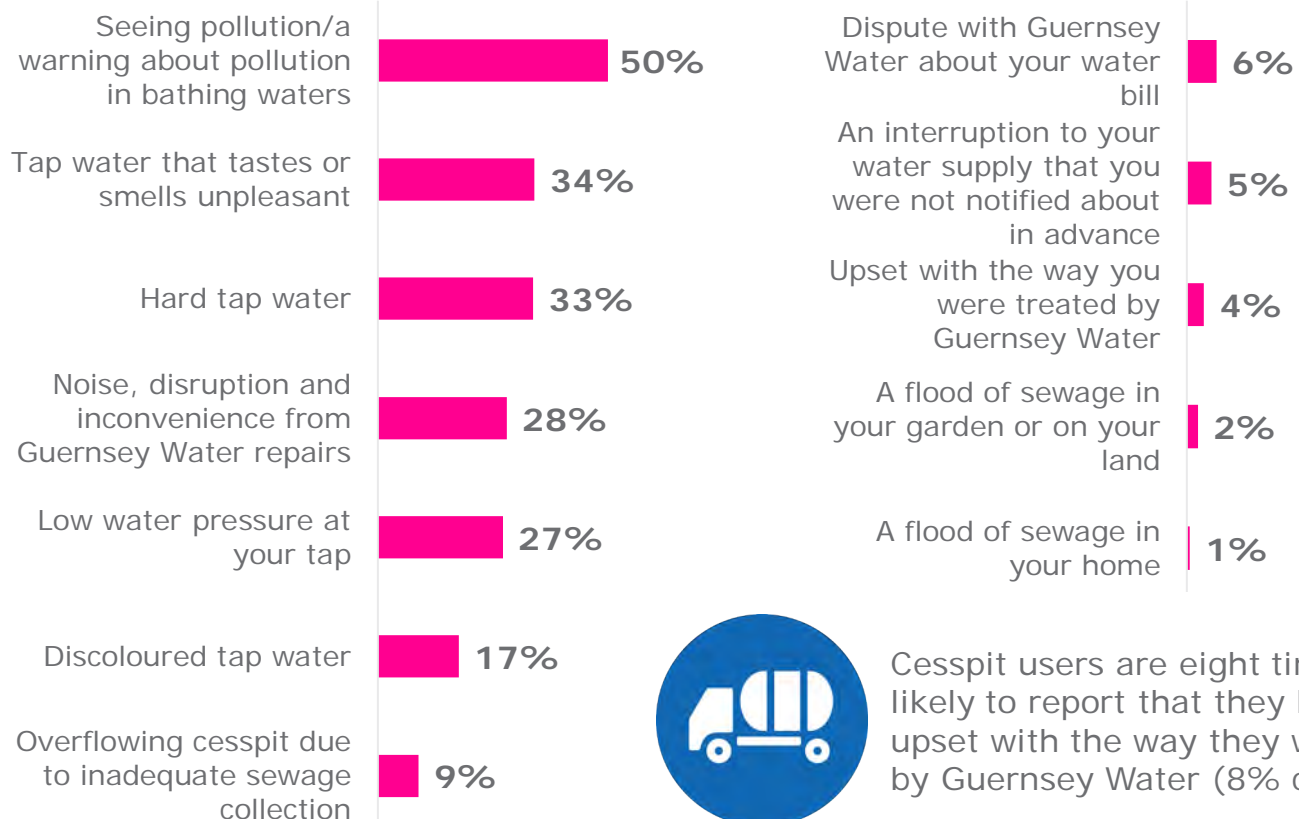
Experiences of water related issues

Three quarters of Guernsey residents say that they have experienced a water related issue in the past year. The most common issue is seeing pollution/a warning about pollution in the bathing waters, with half of these residents experiencing this.

Experienced a water related issue in the past year



■ Yes ■ No



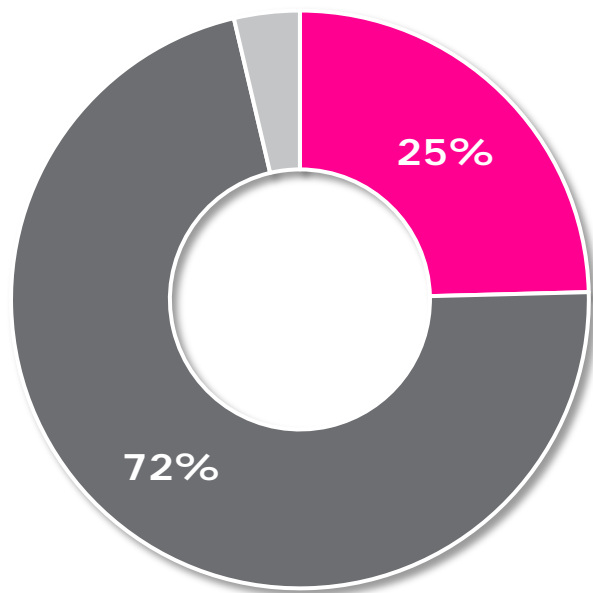
Cesspit users are eight times more likely to report that they have been upset with the way they were treated by Guernsey Water (8% cf. 1%)



Experiences of contacting Guernsey Water

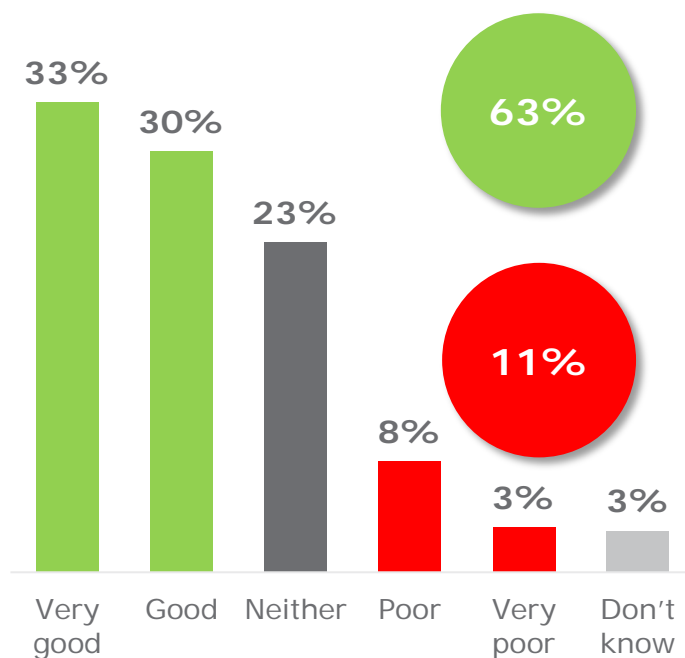
A quarter of those respondents who have experienced a water related issue say that they contacted Guernsey Water. The experience of these customers is largely positive, with 63% rating it as 'good' or 'very good' while 11% rate it as 'poor' or 'very poor'.

Contacted Guernsey Water



■ Yes ■ No ■ Don't know

Customer service rating



"Good response from my phone call with staff being helpful and understanding."

Female, 60-79

"I live in St Martin's, and we have to live with low water pressure. I pay the same as the rest of the island, but don't get the same service."

Female, 50-59

"After making a complaint to Guernsey regarding continued missed cesspit emptying visits... I never had any reply from Guernsey Water."

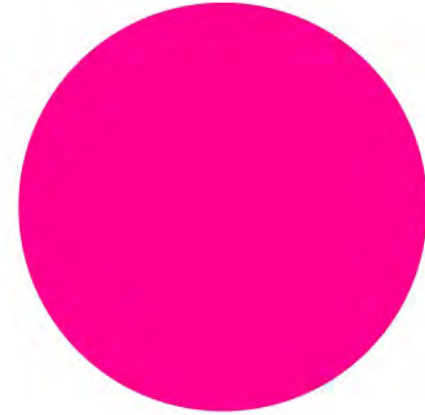
Male, 50-59

Q06. Did you contact Guernsey Water about any of these issues? **Base:** those who have encountered an issue (271)

Q07. How would you rate the customer service you received from Guernsey Water when you contacted them? **Base:** those who contacted Guernsey Water (74)

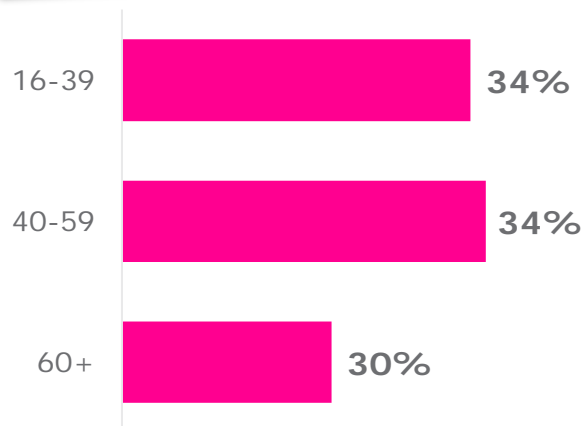
Q08. What is the reason for your score? **Base:** those who gave Guernsey Water's customer service a rating (72)

Appendix: sample profile

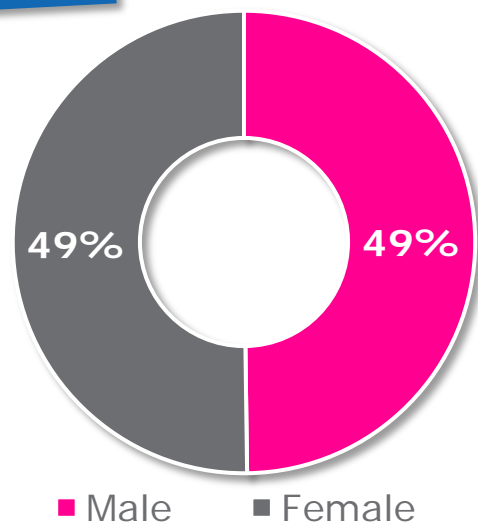




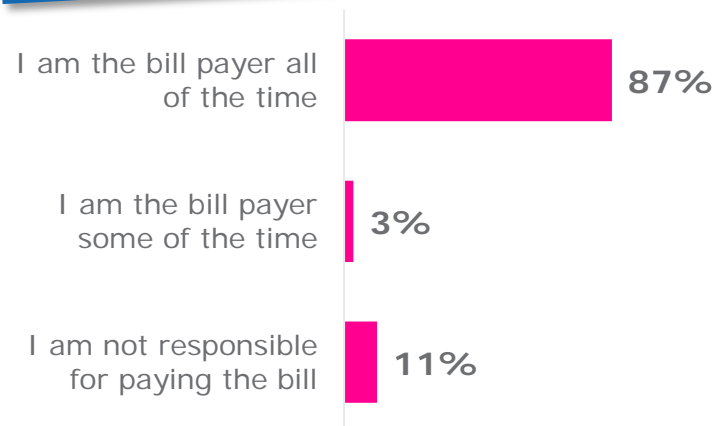
Age



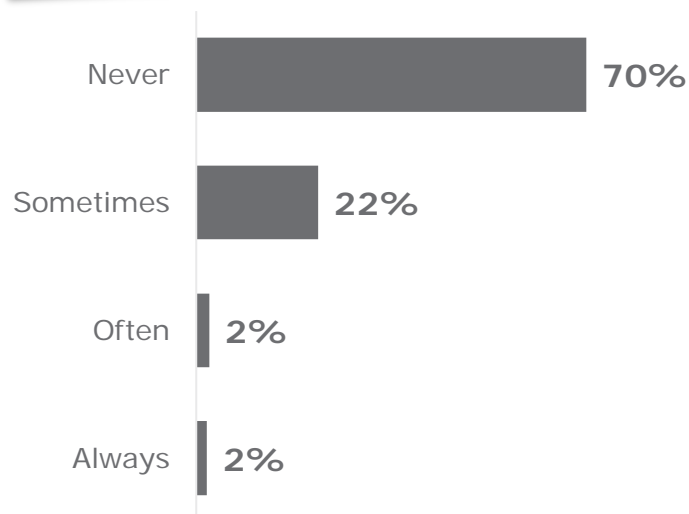
Gender



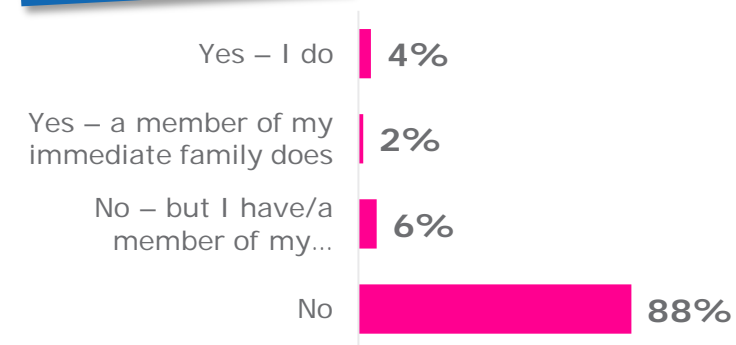
Bill payer status



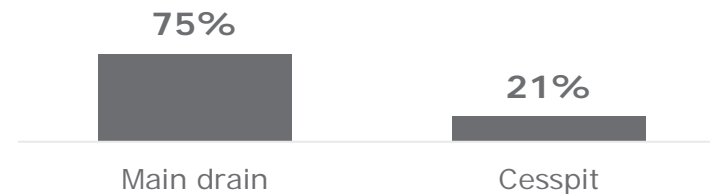
Struggle to pay bills



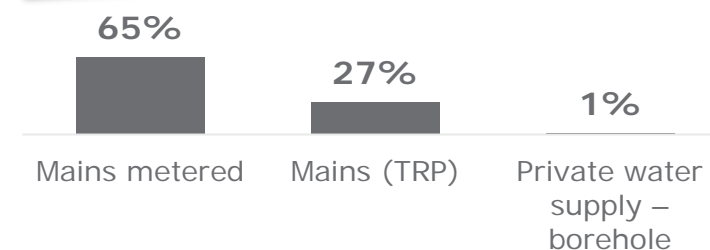
Work for GW



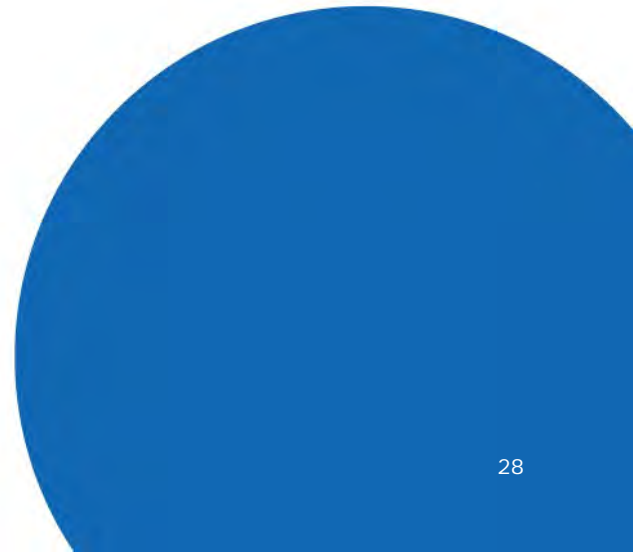
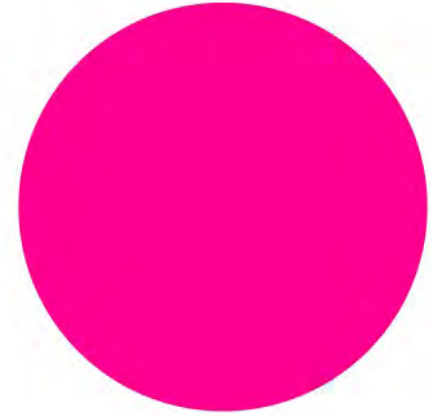
Wastewater status



Water supply



Appendix: MaxDiff





Service measures and descriptions (I)

| Service Measure | Further information |
|--|--|
| Ensuring overall customer satisfaction | Customer feedback on our product, service and whether we are meeting expectations. |
| Timely and reliable customer responses | Keeping appointments and getting back to customers in a timely manner. |
| Delivering an effective service with minimal disruption | Minimising disruptions caused by our roadworks. The performance of our cesspit collection service and new service connections. |
| Supporting vulnerable customers | Supporting customers who need it through financial repayment plans, inclusive communications and accessibility on our sites such as the Millennium walk. |
| Community engagement projects | Implementing community projects such as school visits and to raise awareness of water-related issues. |
| Safeguarding tap water quality to protect public health | Protecting public health by producing water that meets regulatory standards and is safe to drink. |
| Supplying drinking water that looks, smells and tastes good | The colour, taste and smell of our water meets the expectations of our customers. |
| Ensuring access to tap water by extending our drinking water network and providing refill points | Connecting more customers to our water network and providing public drinking water fountains. |
| Defending customers from sewer flooding | Protecting customers from internal flooding (inside a property) and external flooding (in a garden/surroundings). |
| Reducing sewer collapses | Investing to reduce the risk of sewer collapses and failures which can cause flooding, pollution and a loss of service. |
| Decreasing sewer blockages | Investing to reduce the risk of sewer blockages which can cause flooding, pollution and a loss of service. |
| Protecting the environment from wastewater pollution | Reducing incidents of wastewater overflows or spills from the network which impact the local environment. |



Service measures and descriptions (II)

| Service Measure | Further information |
|---|--|
| Extending our main drain sewer network to more customers | Extending and connecting more customers to our sewer network and reducing the need for cesspit emptying. |
| Limiting the effects of pollution caused by Guernsey Water's operations | Reducing incidents of Guernsey Water's operations impacting the environment, such as pollution contaminating streams and water courses. |
| Maintaining the quality of bathing & shellfish waters | Preventing our operations from impacting on bathing and shellfish waters. |
| Minimising environmental impact with regard to waste, energy and carbon | Responsible management of our waste, using renewable energy, recycling, and working towards Guernsey carbon targets. |
| Encouraging biodiversity and creating space for public recreation | Managing our sites to encourage biodiversity and habitats for wildlife. Where possible, allowing public access for recreation. |
| Reducing leaks within our water network | Leaks in our water distribution network can result in water being lost on its way to customers taps. |
| Managing and limiting service interruptions | Managing planned and unplanned service interruptions so that customers are not left without access to tap water or wastewater services. |
| Lowering the risk of future water restrictions | Planning for droughts to reduce the need for hose pipe bans and other water restrictions that could become more frequent due to climate change. |
| Providing good water pressure | Ensuring adequate water pressure and flow when you turn on the tap. |
| Continue to provide water and wastewater services during emergencies | Ensure plans are in place to provide water and wastewater services for our customers at all times. |
| Operating a business and services that are efficient and cost effective | Ensuring that we do not waste money and invest in making our services more efficient. |
| Having a happy and productive workforce | Ensuring Guernsey Water is a great place to work, our staff fulfil their potential and have the equipment they need to keep improving our service. |
| Staff health & safety | Prioritising health and safety to prevent lost days due to injury and safeguard staff wellbeing. |



MaxDiff Methodology: Subgroups

The MaxDiff analysis was conducted on the whole sample, n=368, and was repeated across different subgroups as detailed below.

Each of the subgroups have made more than 2,500 choices giving sufficient data to conduct the analysis.

| Group | Level | Individuals | MaxDiff Choices |
|---|---|-------------|-----------------|
| Age | Under 40 | 125 | 4375 |
| | 40-59 | 127 | 4445 |
| | 60+ | 116 | 4060 |
| Gender | Male | 187 | 6545 |
| | Female | 181 | 6335 |
| What is your household's method of wastewater collection? | Main drain | 275 | 9625 |
| | Cesspit | 79 | 2765 |
| What type of water supply does your household have? | Mains water supply - metered | 240 | 8400 |
| | Mains water supply – tax on real property (TRP) | 100 | 3500 |

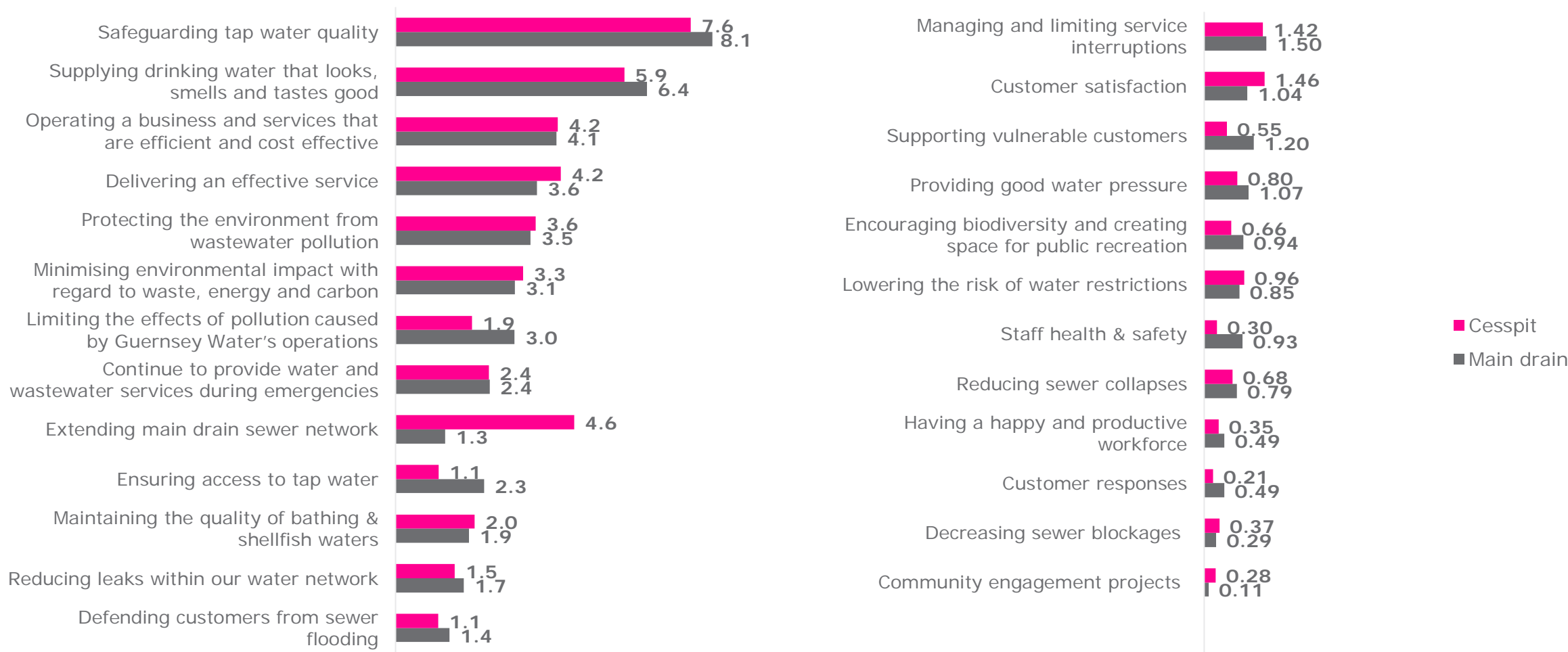


MaxDiff: customer prioritisation by water supply type





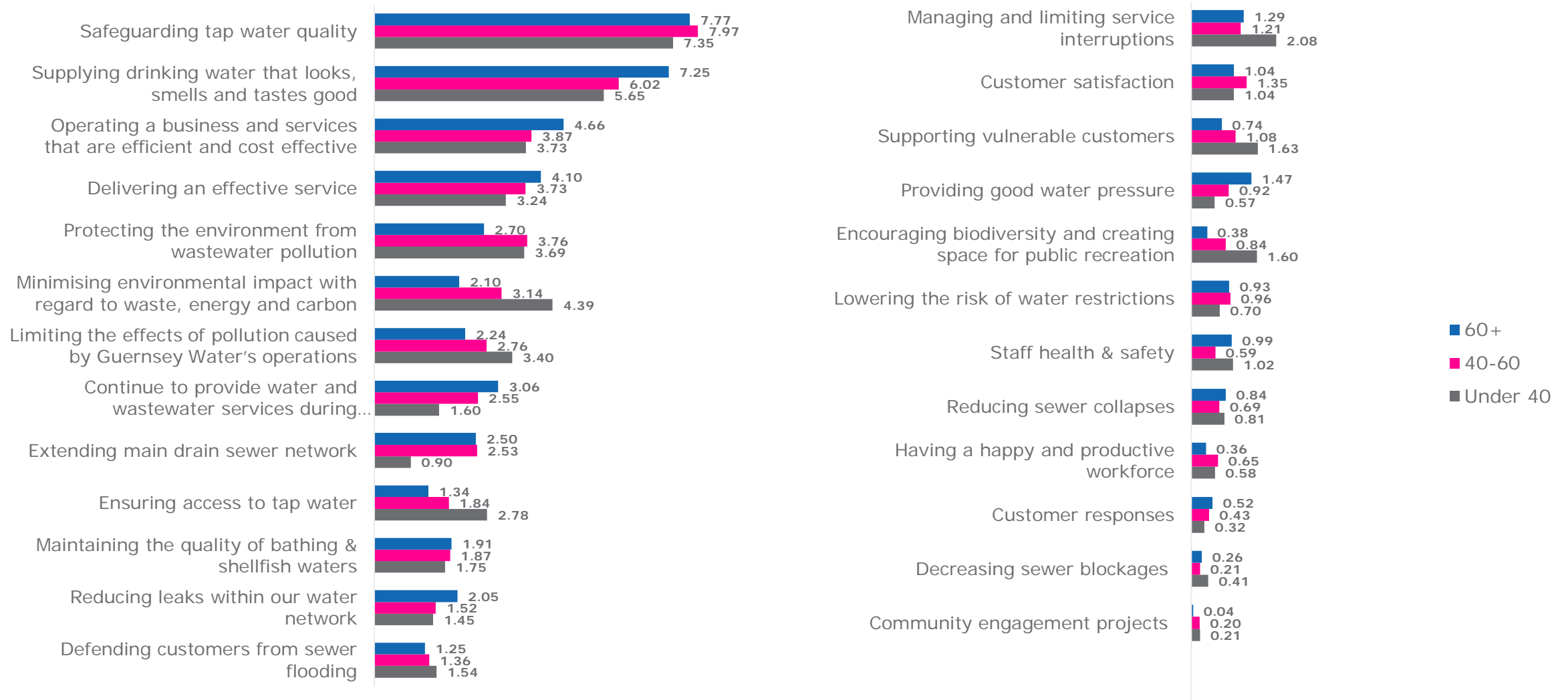
MaxDiff: customer prioritisation by wastewater collection method



Q04. Thinking about Guernsey Water's priorities for the next 3-5 years, which of these are the most important and which are the least important to you? Base: Cesspit (79), Main drain (275)



MaxDiff: customer prioritisation by age





MaxDiff: customer prioritisation by gender



For more information

Alex McCluckie, Research Director
Jamie Lawson, Senior Research Executive



Head office: 3 Pavilion Lane, Strines,
Stockport, Cheshire, SK6 7GH

Leeds office: 2 St. David's Court,
David Street, Leeds, LS11 5QA

+44 (0)1663 767 857
djsresearch.co.uk



Follow us on LinkedIn...

For free market research findings and our latest news and developments: [linkedin.com/company/djs-research-ltd](https://www.linkedin.com/company/djs-research-ltd)

For regularly updated market research findings from your sector, please have a look at our complimentary insights:
djsresearch.co.uk/blog/articles