
Appendix:

YKY18_Our alignment with Ofwat customer engagement standards



YorkshireWater

Navigating this document



This Appendices document is separate to and supports the main business plan document.

Links outside of this report

Read more links

This icon can be clicked on to link to any further documents or resources outside of this report



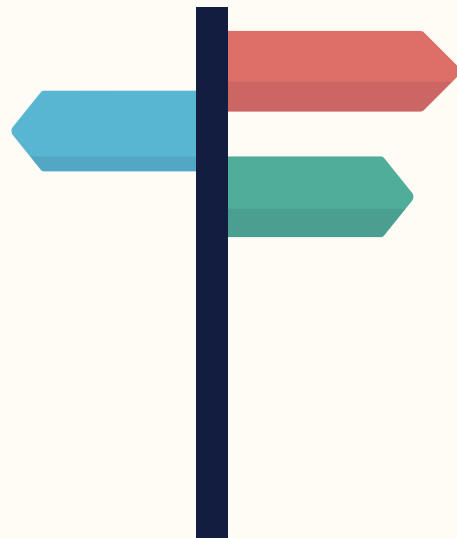
Read more about this at www.ofwat.gov.uk

Business plan links

This icon can be clicked on to go to the main Yorkshire Water Business Plan document where more information can be found.



More detail on this subject can be found in [Chapter 6: Customer and stakeholder engagement](#)



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1. Our alignment with Ofwat customer engagement standards


We have made sure to assess our customer, community and stakeholder engagement programme against the Ofwat published customer engagement standards. These can be found in Ofwat’s customer engagement policy paper.



Read more about this at [PR24 and beyond: Customer engagement policy](#)



You can see how we meet each of these standards in our summary table below.

1.1 Our alignment to Ofwat customer engagement standards

Customer engagement standard	How we’ve met this
High quality research	
<p>Neutrally designed</p> <p>Fit for purpose</p> <p>Ethical</p>	<p>We have worked with independent consumer research experts to ensure that our studies are non-biased and meet the minimum requirements for high quality research, including establishing that our research is ethical in nature, neutrally designed and fit for the purpose of the research objectives.</p>
Inclusive	<p>We have made sure our approach is inclusive, involving a diverse range of customers across our studies. For example, we have used face-to-face and telephone interviews to balance online studies and ensure we are supporting those who may be digitally excluded. We have also had face to face in-depth interviews with vulnerable customers in their own homes where they might struggle to attend focus groups or again, are digitally disengaged. Additionally, our research spans a variety of customers and representations – including household customers, non-household customers, retailers, NAVs, future bill payers, digitally excluded customers, vulnerable customers, customers from across our region (North, South, East Riding, West Yorkshire), urban, rural and coastal, mixed socio-economic groups and include multiple ethnic groups.</p>
Continual	<p>Our research is ongoing. We undertake research as business-as-usual activity, helping shape direction and decisions. An example of this is trying to understand how we stop fixing customer side leaks which reduce our ability to manage operational issues that are firmly our responsibility. Our insight helped shape how we carefully manage this with our customers.</p> <p>We also have several longitudinal studies. Our customer satisfaction tracker has been running for 15+ years and our inclusive service performance commitment research has been ongoing since 2019. This provides valuable insight on our progress in terms of improving the services and support offered to customers in vulnerable circumstances. Indeed, we also have our Customer Voice surveys, contact and complaints data and social media listening which we monitor for trends to allow us to identify issues and act on them early.</p> <p> More detail on this subject can be found in Chapter 6</p>

Customer engagement standard	How we've met this
	<p>Our customer engagement is then bolstered for business planning purposes to ensure our future plans meet the needs of our customers.</p>
<p>Shared in full with others</p>	<p>We have published relevant business plan research materials on our website.</p> <p> Link to all relevant research materials https://www.yorkshirewater.com/about-us/our-plans-for-2025-2030/pr24-project-documents/</p>
<p>Useful and contextualised</p>	<p>Throughout the business planning process, we have made sure to continually assess the need for engagement on specific topics. Where we identify potential business improvements, we have backed this up with research that has practical relevance. In addition, we have always let our customers know what the purpose of the research is and how we will use it in the business, allowing them to understand the importance of their contributions.</p>
Customer challenge	
<p>Independence</p>	<p>We use external research partners to ensure that an independent approach is used, and that the resulting report is neutral. You can find further information on our research partners in Appendix 3.</p> <p> More detail on this subject can be found in Chapter 6 – Our research partners</p> <p>Yorkshire Forum for Water Customers (The Forum) independently challenge our research throughout the process from briefing to reporting and hold us to account, ensuring that our business plan reflects the needs of our customers and community. For information on members of The Forum, see our website.</p> <p> Read more about this at www.yorkshirewater.com/about-us/yorkshire-forum-for-water-customers/</p> <p>We also work with the Yorkshire Leaders Board, a collective of the councils and Mayoral Combined Authorities within Yorkshire – which provides independent stakeholder guidance and feedback on our business plan. You can read more about the Yorkshire Leaders Board across Chapter 6.</p> <p>In Chapter 6, you can see how feedback from the Yorkshire Forum for Water Customers and the Yorkshire Leaders Board form part of the mechanism that guarantees customer and stakeholder challenge is taken on board.</p> <p> More detail on this subject can be found in Chapter 6</p>
<p>Board accountability</p>	<p>Our Board is accountable for making sure our customer research feeds into our future plans. Customer feedback is communicated upwards, allowing for board feedback and challenge across the research programme.</p> <p> More detail on this subject can be found in Chapter 10</p>
<p>Ongoing</p>	<p>Our research, and therefore any resulting challenge, is ongoing. Understanding our customers is something we do every day, whether that be social media listening, using</p>

Customer engagement standard	How we've met this
	<p>our Customer Voice feedback to drive customer service improvements for customers or understanding their perceptions of us through activity such as our satisfaction surveys or C-MeX feedback. During our 'Your Water, Your Say' event, while we focused our presentation on our future plans, the independent Chair opened up the floor to our customers, community and stakeholders and we welcomed their views and challenge beyond just our PR24 business plans, for example on the more immediate performance challenges. A summary of the challenges raised from the event can be found in Appendix 9.</p> <p> More detail on this subject can be found in Chapter 6 Appendix - Summary of our 'Your Water, Your Say' event</p> <p>In many of our research studies specifically for our business planning process, we provided contextual information on our current performance, to ensure our customers were fully informed to provide meaningful insight. An example of this can be seen in the testing for our Long-Term Delivery Strategy. Comprehensive stimuli were provided to customers, which showed 2023 performance against each of the performance commitments tagged to our ambition headlines.</p> <p> More detail on this subject can be found in Chapter 6 Appendix - Yorkshire Water customer research as specifically quoted in Chapter 6</p>
<p>Informed</p>	<p>We followed Ofwat/CCWater guidelines with regards to presenting comparative information in our Affordability and Acceptability testing research; allowing customers to see clearly how we compared to our peers. In addition, we presented our performance data as prescribed by Ofwat/CCWater informing our customers on where we failed to deliver the service we promised or provided a service beyond what they paid for. In homework tasks we directed our customers to Discover Water or our website to learn more beyond what we were asked to present.</p> <p>Our 'Your Water, Your Say' session was well attended by customers, community groups and other stakeholders. Questions covered a variety of topics, including combined sewer overflows (also known as storm overflows) and affordability of bills. We have met the requirements to publish a summary of the session, including responses to the challenges posed, which can be found on our website.</p> <p> Read more about this at www.yorkshirewater.com/about-us/your-water-your-say/</p> <p>Our research studies allow customers opportunities to provide feedback on options, enabling us to shape our plan to align with their priorities. Examples of this can be</p> <p><i>Affordability and acceptability testing</i></p> <p><i>Our affordability and acceptability core testing provided customers with an enhanced plan on top of the 'least cost plan'.</i></p>

Customer engagement standard	How we've met this
	 <p><i>The 'least cost plan' reflects what companies must do to meet their statutory requirements. We showed further options that could be added to the plan, which went beyond our statutory requirements. These options included accelerate investment related to storm overflows at our coast, improving the resilience of water supply for customers on a single supply system (at Chellow WTW) and applying innovation to flood resilience plans in Hull and East Riding which could be rolled-out across our region.</i></p> <p><i>The Yorkshire Forum for Water Customers supported this approach. 78% of customers found out plan acceptable</i></p>
<p>Transparent</p>	<p>All of our reports except for our ongoing tracking reports are collated by the independent research agencies who undertake the work, and these reports and insights are what we report on. When shared internally these are done so by PDF so data and charts can't be manipulated.</p> <p>In our Affordability and Acceptability testing, we show our customers accurate performance data as shared by CCWater on our current performance and how we compare to our peers.</p> <p>Regarding the Yorkshire Forum for Water Customers challenges – each challenge is collated on a spreadsheet with the action that was taken on the back of the challenge and how this has fed into the research. All challenges and their attributing actions can be found in Chapter 6 Appendix: Yorkshire Forum for Water Customers.</p> <p>In line with expectations from Ofwat, we published minutes of the 'Your Water, Your Say' customer challenge session on our website.</p> <p> Read more about this at www.yorkshirewater.com/about-us/your-water-your-say/</p> <p>We are committed to doing the same with our second 'Your Water, Your Say' customer challenge session on 23rd November 2023. We have also published our business plan research reports as part of this process.</p>
<p>Representative</p>	<p>All our research aims to be as representative as possible, especially when a study is classed as core to our business planning. Our sampling guidance provided to our agencies ensures we aim for a representative sample across multiple demographics, including age, gender, socio-economic group, area of the region, ethnicity, vulnerability, benefit claimants and financial vulnerability. In more recent studies we have aimed to collect the index of multiple deprivation (IMD) as another layer of representation of our customer base is included in our studies. This allows us to be satisfied that customer challenge coming out of our research is representative. Our sampling suggestions for PR24 projects have been signed off by the Yorkshire Forum for Water Customers who openly challenge sampling to ensure representation and robustness in all areas of our PR24 research. Challenges on this can be seen in our challenge the Chapter 6 Appendix: Yorkshire Forum for Water Customers.</p> <p>Key Yorkshire stakeholders have also challenged our plan via the Yorkshire Leaders Board (YLB). Priorities and challenges from this group have been recorded throughout</p>

Customer engagement standard	How we've met this
	<p>our plan. You can read more about challenges and views from the YLB in Appendix 10 of Chapter 6.</p> <p> More detail on this subject can be found in Chapter 6 Appendix - Summary of our engagement with the Yorkshire Leaders Board</p> <p>Regarding 'Your Water, Your Say' - we invited a diverse range of customers and stakeholders to our event, including household customers, non-household customers, interest groups, NAVs, retailers and NAV customers.</p>
Comprehensive	<p>Our extensive research programme gives opportunity for our customers, community, and stakeholders to have meaningful views on a range of different areas across water, wastewater, customer, one-off schemes, performance levels and bill impacts. Such examples include our water resource north customer engagement to support our Water Resources Management Plan, our Drainage and Wastewater Management Plan testing, our Long-Term Delivery Strategy testing, our bill profile research, and our studies on the support for social tariffs.</p> <p>We have taken both a proactive and reactive approach to designing our customer engagement – taking into consideration areas we know our customers will have views on, but also reacting to outputs from studies, and incorporating additional detailed research to delve deeper. An example of this is our approach to our affordability and acceptability testing, responding to the challenges of the initial study and developing further engagement on the topic to ensure our customers had full visibility of our plan and could provide comprehensive affordability and acceptability evaluations.</p> <p>Our 'Your Water, Your Say' event provided a wealth of information on our future plans and investments across water and wastewater services and customer services, as well as what this means for customer bills. The floor was opened to any areas customers wished to provide views on, and we gained meaningful insight into a range of topics, from combined sewer overflows (CSO's) to swimming in reservoirs.</p>
Timely	<p>Our journey to developing our future plans started soon after PR19, and our customer research to support this commenced shortly afterwards. For example, our Water Resources Management Plan research commenced in December 2020, which then fed into our wider Long-Term Delivery Strategy and our PR24 business plan.</p> <p>We have endeavoured to give our customers time to absorb information before providing feedback which we then act on. An example of this can be seen in our affordability and acceptability research studies, where pre-read information was provided to customers, allowing them to take time to consider our business plan proposal, individualised bill impacts and performance, both ours and the wider industry. Following this, we invited customers to take part in qualitative and quantitative surveys, where we gathered insightful feedback, which has then fed into our business plan.</p> <p>During our 'Your Water, Your Say' customer event, we also gave customers opportunities well ahead of the session to submit questions, which were then all responded to either in the session, or in our published minutes which followed shortly. From a thematic analysis of all of the questions submitted, the largest theme was around water quality and pollution, with a number of questions and comments related to our use of storm overflows. We've responded by proposing a significant investment in a storm overflow reduction programme.</p> <p>We do, however, acknowledge that there have been challenges in ensuring we give our customers enough time to respond to different plan options. In our affordability and acceptability testing, ideally, we would have liked to have given our customers more opportunities to challenge multiple iterations of our plan, however due to delays receiving ODI information, we were unable to provide this opportunity.</p>

Customer engagement standard	How we've met this
	<p>For the 'Your Water, Your Say' customer challenge session we followed the timelines prescribed by Ofwat.</p>
<p>Assurance</p>	
<p>Independent</p>	<p>The members of the Yorkshire Forum for Water Customers are fully independent of Yorkshire Water and meet monthly to challenge our activities. They have skills and experience in customer relations, economics, local government, the environment, farming, regulation and working with vulnerable households.</p> <p> Read more about this at www.yorkshirewater.com/about-us/yorkshire-forum-for-water-customers/</p> <p>We also work with the Yorkshire Leaders Board, a group that provides challenge on our strategy and business plan. Members include many of the councils across the Humber, North, South and West Yorkshire as well as some of the combined authorities across our region. See Chapter 6 Appendix - Summary of our engagement with the Yorkshire Leaders Board for more information.</p> <p> More detail on this subject can be found in Chapter 6: Engaging with our customers, communities, and stakeholders</p>
<p>Transparent</p>	<p>All relevant business plan research has been shared with the Yorkshire Forum for Water Customers, to enable a fully informed view and assurance process. When carrying out Ofwat standardised research, we consulted The Forum for guidance on moving away from the prescribed approach in a number of areas as outlined above. We also took the Yorkshire Forum for Water Customers through our approach to 'Your Water, Your Say' and our approach to closing this out afterwards. We are now consulting our Forum members on the next 'Your water, your say' event. The Forum also plays a key role in assuring our APR each year.</p> <p> More detail on this subject can be found in Chapter 6: Engaging with our customers, communities, and stakeholders</p>
<p>Expert</p>	<p>All our research is undertaken by independent expert market research agencies who are experienced in undertaking research in the water sector. All follow the Market Research Society (MRS) Code of conduct, and many are MRS Partners.</p> <p>In addition, all relevant business plan customer and stakeholder research has been shared with the Yorkshire Forum for Water Customers, who provide assurance on behalf of the Yorkshire Water Board. We have also engaged with the Yorkshire Water Leaders Board who provide useful feedback on our plans. Both groups consist of experts in their field, with a significant interest in the services we provide across the region.</p>
<p>Comprehensive</p>	<p>It is not just the PR24 research carried out by Ofwat and CCW above that we have fed into our business plan; we have taken on board a wealth of other research led by multiple parties, including Market Operator Services Limited (MOSL), WaterUK and UK Water Retailer Council (UKWRC). An example of this can be seen below:</p> <p>UKWRC response to Ofwat consultation on methodology for PR24</p>

Customer engagement standard

How we've met this




This research was commissioned by retailers and completed by UK Water Retailer Council (UKWRC) to provide simple and consistent feedback to wholesalers. It provided us with valuable insight from retailers into requirements for the business plan for wholesalers and Ofwat.

The main 'asks' of water companies and how we are responding as a result are outlined below:

Retailer Asks	Detail of the Ask	Our response
<p>Provision of excellent wholesale services</p>	<p>Retailers would like an alignment on the performance incentivisation currently in place for household customers, to deliver excellent outcomes for all current and future non-household customers.</p>	<p>Our wholesale market service team has been active in the water retail market and performs at upper quartile for a number of key market measures, including Market Performance Standards (timeliness of data processing); Operational Performance Standards (timeliness of operational service requests) and R-MeX. We have supported MOSL and the Strategic Panel through our Market Engagement Framework, which includes chairing and participation in industry groups; leading Market Improvement Fund projects; contributing towards effective market change and reducing market frictions.</p> <p>Through our R-MeX survey reviews we know that retailers want us to engage with them more on performance, continued data accuracy and a smart metering roll-out. Based on the latest results from February 2023, we know we are performing well – we ranked 6th out of 15 – but we also understand that there are opportunities for improvement, and relish being able to drive even better performance in the future.</p> <p>Customer service expectations (including business customers who contact us directly) span across three main areas:</p> <p>Customers require a more proactive service, being kept informed about issues that may affect them.</p> <ul style="list-style-type: none"> • They expect simple service journeys when they do need to get in touch. • They prefer delivery through an effective optimised multichannel experience. <p>Chapter 8 provides further detail on how this will be achieved in the 2025 to 2030 period, including through development of systems</p>

Customer engagement standard	How we've met this	
		<p>and online portals, behaviour change campaigns and offering a greater choice of ways to interact with us.</p> <p> More detail on this subject can be found in Chapter 8</p> <p>We have been actively participating in the design of future performance incentivisation including membership of the Market Performance Framework (MPF) Advisory Group and conducted a BR-MeX pilot, which was shared with Ofwat working groups. We have an annual business plan process where we review MPF and the MOSL plan to align our activities, measures and resourcing.</p> <p>To align with the new MPF and the new challenges of PR24 which includes BR-MeX, we will enact our 2025 to 2030 readiness plan, supplemented by our annual business planning. This will ensure we continue to drive excellent outcomes for retailers, business customers and the wider market. All this will help Yorkshire to remain a place where retailers and businesses can thrive.</p>
	<p>Water efficiency services</p>	<p>Retailers requested incentivisation for parties to work collaboratively to improve data quality and drive behavioural change associated with water usage.</p> <p>We have created a business customer water demand plan. This joins up our non-household customers with the approach we have taken on leakage with household customers.</p>
	<p>Implementation of smart meters</p>	<p>Retailers want improved availability, quality and consistency of consumption data to help customers with their usage and subsequent bills.</p> <p>Our PR24 and WRMP plans include implementation of smart meters for non-household premises across Yorkshire.</p> <p>We will work collaboratively with retailers to ensure the benefits outlined as requested are realised. Yorkshire Water currently sit on the Strategic Panel's metering committee so is well placed to both to support and ensure alignment with the NHH Market Metering strategy.</p> <p>We will enact our 2025 to 2030 readiness plan, which will be supplemented by</p>

Customer engagement standard	How we've met this
	<div data-bbox="363 271 1444 378" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p><i>continued engagement with retailers through our retailer engagement channels.</i></p> </div> <p>Triangulation forms a critical element of assuring our customer engagement research. We know that relying on customer research projects in isolation decreases the level of confidence in the results and risks the useability of the output. In many cases we triangulate across data sources to ensure our conclusions and decisions are based on multiple sources of data including:</p> <ul style="list-style-type: none"> • Tracking projects • Customer contact data • Customer Voice feedback • Social Media • Media • Complaints <p>Independent studies undertaken by external companies/bodies as mentioned above - (CCWater, Ofwat, MOSL etc.)</p>
<p>Board ownership</p>	<p>The Board has the ultimate ownership of our PR24 plan. The board have been consulted on the customer engagement and research and have provided feedback and recommendation on approaches and undertakings.</p> <p>The Board has been presented with information on the measures for high quality engagement and the reasons why these measures have been met with Yorkshire Water's customer engagement plan and the Board has been able to review and challenge the extent and breadth of the engagement programme. The Board has also been able to observe customer focus groups as part of their assurance. The Board has been given assurance from the Yorkshire Forum for Water Customers that the engagement plan meets their high standards and expectations and that it has been delivered as proposed.</p> <p>The Board provides assurance that the company's customer engagement and research meet the standards for high-quality research and any other relevant statements of best practice and has been used to inform its business plan and Long-Term Delivery Strategy.</p> <p>More about our assurance process and Board assurance can be found in Chapter 10.</p> <div data-bbox="363 1554 874 1639" style="margin-top: 10px;">  <p style="margin-left: 10px;">More detail on this subject can be found in Chapter 10: Board Assurance</p> </div>