

2017 Summer Consultation

Report

6th October 2017



Method

Profiling – who
took part?

Importance of
statements

Bills vs. investment

Summary

Method



How customers were reached

- At different events across Wales via tablets
- Through the Welsh Water website
- An industry first bi-lingual chatbot via Facebook messenger
- Via paper questionnaires

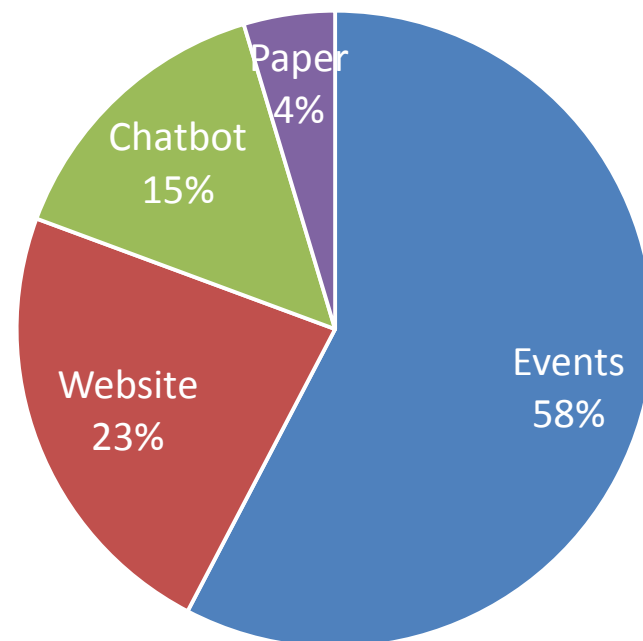
Timings

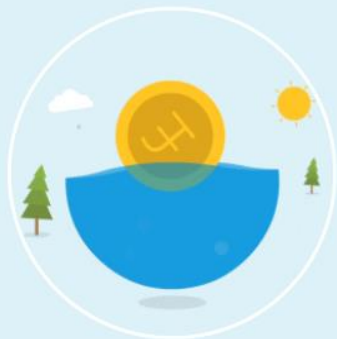
- The consultation took place between 14th July 2017 and 18th September 2017

Considerations

- Pride Cymru and the Bromyard Hop Festival both took place on 27th August and so we cannot isolate where consultations took place on this day
- The source of the paper questionnaires were not recorded, so we cannot link the paper questionnaires to any specific event

**Total
customers
consulted
19,980**





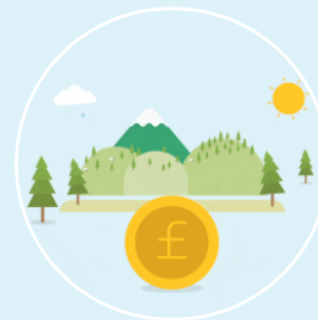
For your future

Welsh Water is not for profit, it's for you.

We don't have shareholders, which means every penny we make goes back into looking after your water and environment - for now, and for the future.

The not-for-profit status of Welsh Water was explained at the beginning of the questionnaire.

Participants were also informed about the reason for the consultation: to shape the future policies of Welsh Water.



Planning Ahead

There are many challenges ahead and we've got a huge network of water pipes, sewers and treatment works to look after.

We've got plans to invest billions of pounds over the coming decades to make sure that your drinking water and environment remain great. But we can't do it all straight away, it would cost too much. So we want to know, what things are most important to you and your community.

- A total of 19,980 Welsh Water customers completed the consultation
 - While the total number of completed consultations actually reached nearly 21,000, some were from outside the Welsh Water catchment, and so are excluded from this report

Total consultations included	19,980*
Attending Cardiff Bay Food Festival	1,887
Attending Royal Welsh Show	3,227
Attending National Eisteddfod - Anglesey	3,914
Attending Anglesey Show	939
Attending Pride Cymru **	514
Attending Iron Man Tenby	746
Completing via website	4,590
Completing via chatbot	2,942
Completing via paper questionnaire	926
Unknown	295

* We have included all complete consultations except those recording a postcode area known to be outside of the Welsh Water catchment

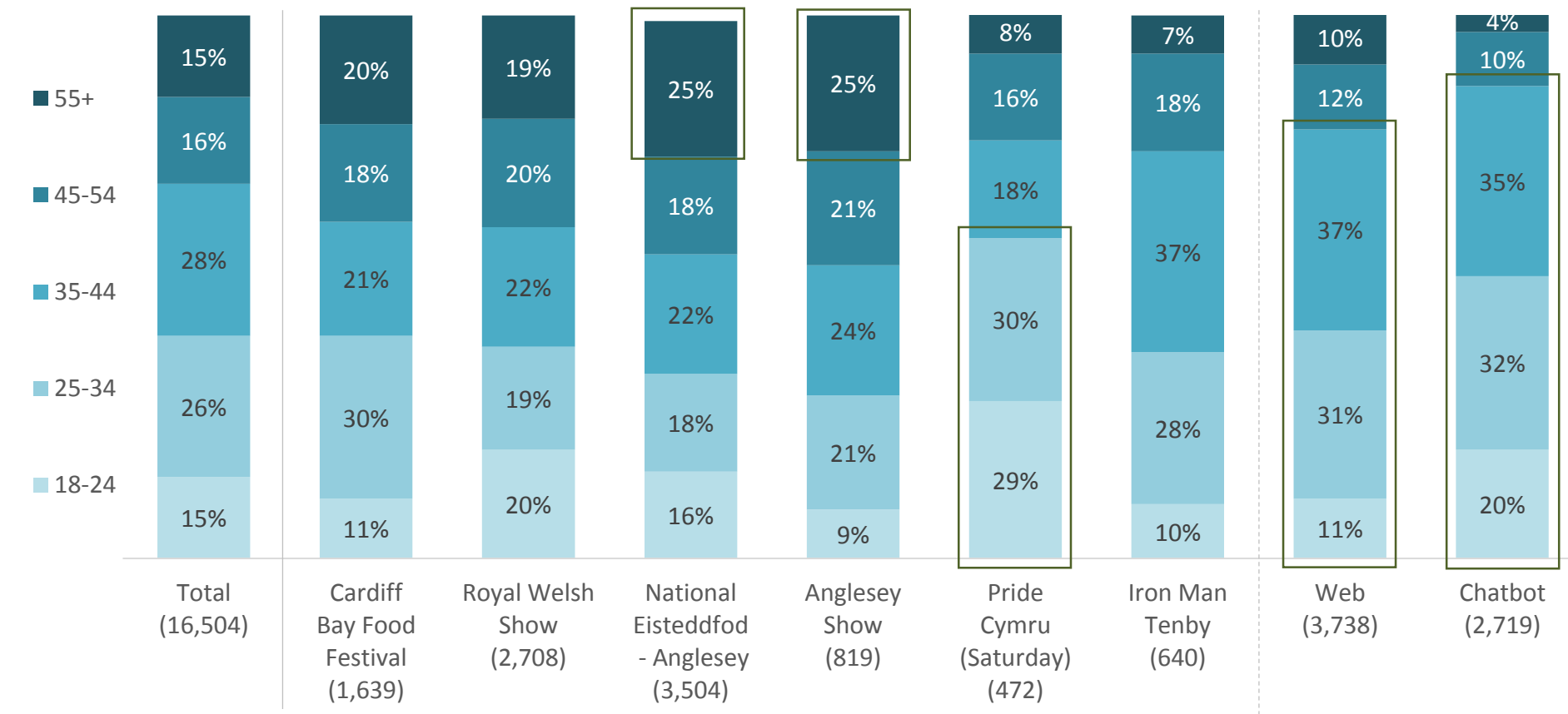
** This is all consultations known to have been completed at Pride Cymru. All these took place on the Saturday, we were unable to identify consultations that took place at Pride Cymru on the Sunday

A photograph of a crowded outdoor event, possibly a festival or fair. In the foreground, a woman with long blonde hair is eating an orange. To her right, a man in a blue and white plaid shirt is seen from the back. In the background, there are white tents and a flag with a red dragon on a green and white field. A semi-transparent blue banner with white text is overlaid across the middle of the image.

Profiling – who took part?

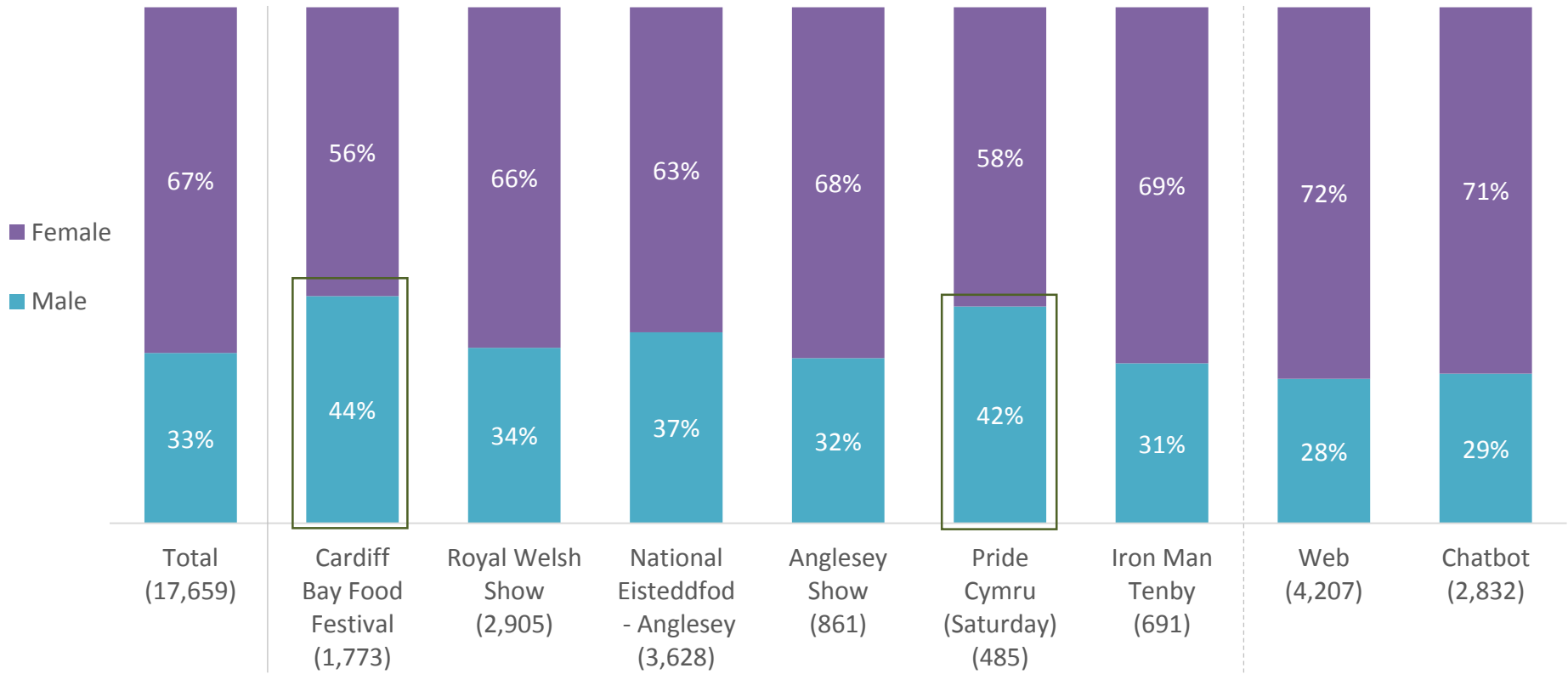
A good spread of ages took part. Attendees at the Eisteddfod and Anglesey Show were a little more likely to be over 55 years old. In contrast, those attending Pride Cymru, and those completing the consultation via chatbot were much younger.

Respondent age by event / channel
(Base: All respondents who recorded their age, 16,504)

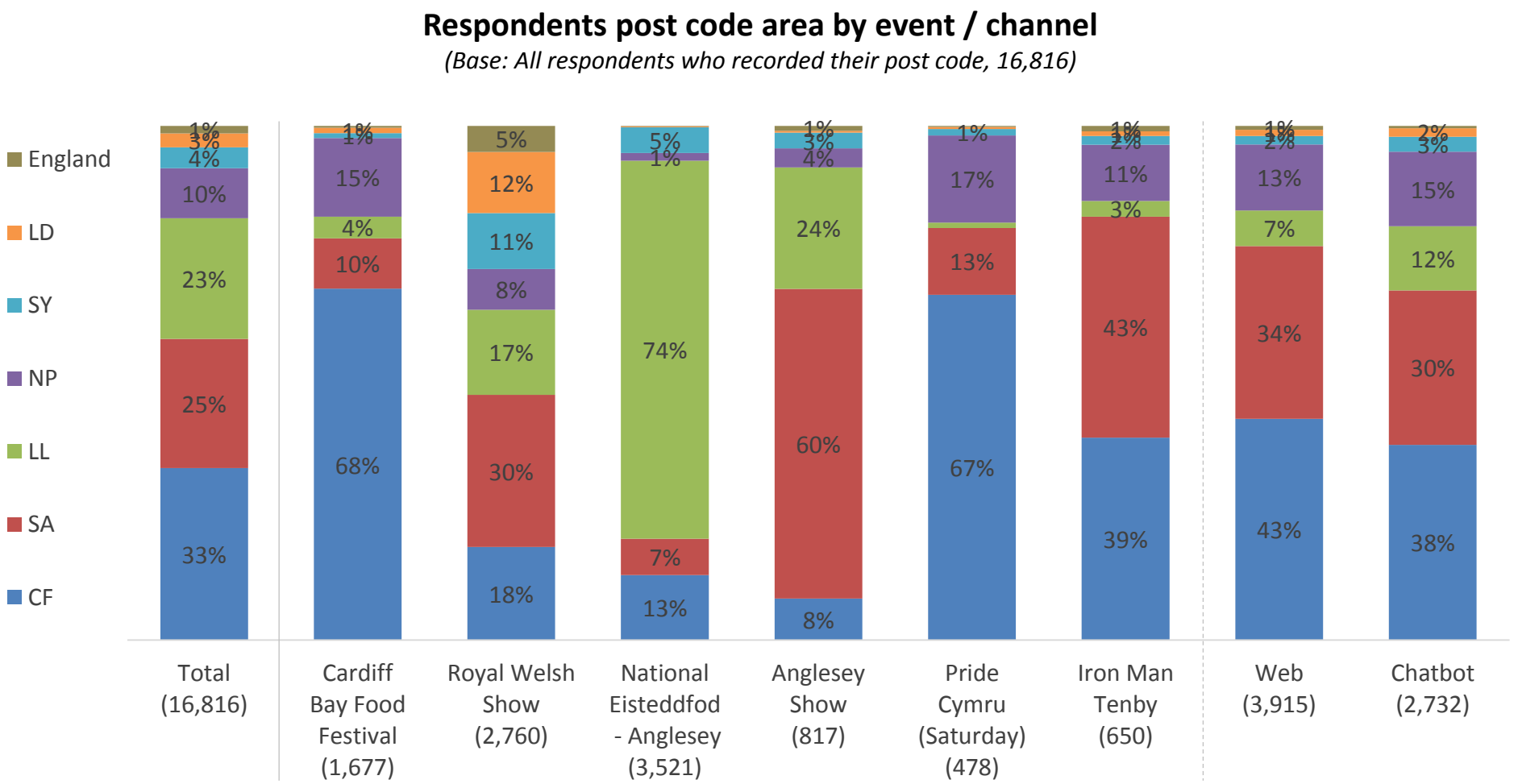


Overall, 2/3 of those who took part were women; the Cardiff Bay Food Festival and Pride Cymru were more oriented to men than other events.

Respondents gender per event / channel
(Base: All respondents who recorded their gender, 17,659)



Cardiff Bay Food Festival, the Pride Cymru, the Eisteddfod in Anglesey and the Anglesey Show tended to attract people from a more local area – visitors to The Royal Welsh came from a wider range of locations.



- A wide range of age groups took part in the consultation, with different events attracting different age groups. For instance, The Eisteddfod and Anglesey Show attendees were more likely to be over 55 years old while those at Pride Cymru were much younger
- Those completing the consultation on the web, and via the chatbot in particular, tended to be younger than those who were at the events
- Women were more likely to take part - nearly 2/3 of all respondents were female. However, the Cardiff Bay Food Festival and Pride Cymru were more oriented to men
- Some of the events had a more local audience, while others attracted people from farther afield – visitors to The Royal Welsh came from the widest range of places





Importance of statements

Participants were presented with 8 statements, each with a short explanation of their meaning, and (for the digital channels) an animated visual. The order in which they saw the statements was rotated. For each statement they were invited to answer the question 'How important is this to you and your community?'. The questionnaire was bilingual in all formats, including the chatbot.



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Better water quality for all

Our network of water pipes was installed a long time ago.

Many of the old pipes that carry water to our homes are made of cast iron which can affect the colour, taste and smell of our water.

We'll gradually replace old iron water mains to make sure our water continues to taste and look great in the future.



How important is this to you and your community?





	Mean score On a scale of 1 to 5
Cleaner rivers and beaches	4.59
Working with nature for cleaner water	4.51
Better water quality for all	4.50
Working with nature to reduce flooding and pollution risks	4.46
Making the water supply more reliable	4.33
Making things better for customers who are let down most often	4.24
Giving more back to our communities	4.21
Helping people who struggle to pay their bill	3.89

(Base: All respondents, 19,980)

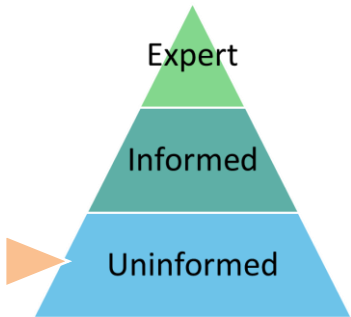
The order of importance is very consistent across different groups. The only differences are that those completing the paper survey put ‘Working with nature to reduce flooding and pollution’ higher up the list, and those aged 55+ rank ‘Better water quality for all’ slightly above ‘Working with nature for cleaner water’.

Mean score (On a scale of 1 to 5)													
↑ IMPORTANCE		Total	Data collection channel				Age					Gender	
			Event	Web	Chatbot	Paper	18-24	25-34	35-44	45-54	55+	Male	Female
	Cleaner rivers and beaches	4.59	4.60	4.63	4.57	4.44	4.50	4.59	4.63	4.64	4.63	4.55	4.63
	Working with nature for cleaner water	4.51	4.53	4.54	4.44	4.38	4.42	4.50	4.54	4.57	4.56	4.46	4.55
	Better water quality for all	4.50	4.53	4.47	4.51	4.37	4.44	4.50	4.52	4.52	4.58	4.46	4.54
	Working with nature to reduce flooding and pollution risks	4.46	4.47	4.46	4.42	4.40	4.36	4.44	4.47	4.48	4.54	4.40	4.50
	Making the water supply more reliable	4.33	4.38	4.28	4.19	4.29	4.27	4.28	4.32	4.38	4.44	4.29	4.35
	Making things better for customers who are let down most often	4.24	4.28	4.19	4.16	4.23	4.21	4.19	4.23	4.31	4.35	4.17	4.28
	Giving more back to our communities	4.21	4.27	4.17	4.11	4.07	4.19	4.18	4.24	4.25	4.26	4.11	4.27
	Helping people who struggle to pay their bill	3.89	3.99	3.81	3.61	3.93	4.06	3.82	3.80	3.89	3.98	3.81	3.92

(Base: All respondents, 19,980)

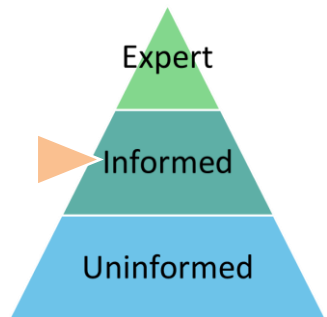
The order of importance in the (uninformed) Summer Consultation is broadly comparable with the much more informed viewpoint seen in the Water 2050 Qualitative research. However, there are some differences, with ‘improving supply reliability’ higher up the order in the informed research.

Summer Consultation



- Cleaner rivers and beaches
- Working with nature for cleaner water
- Better water quality for all
- Working with nature to reduce flooding and pollution risks
- Making the water supply more reliable
- Making things better for customers who are let down most often
- Giving more back to our communities
- Helping people who struggle to pay their bill

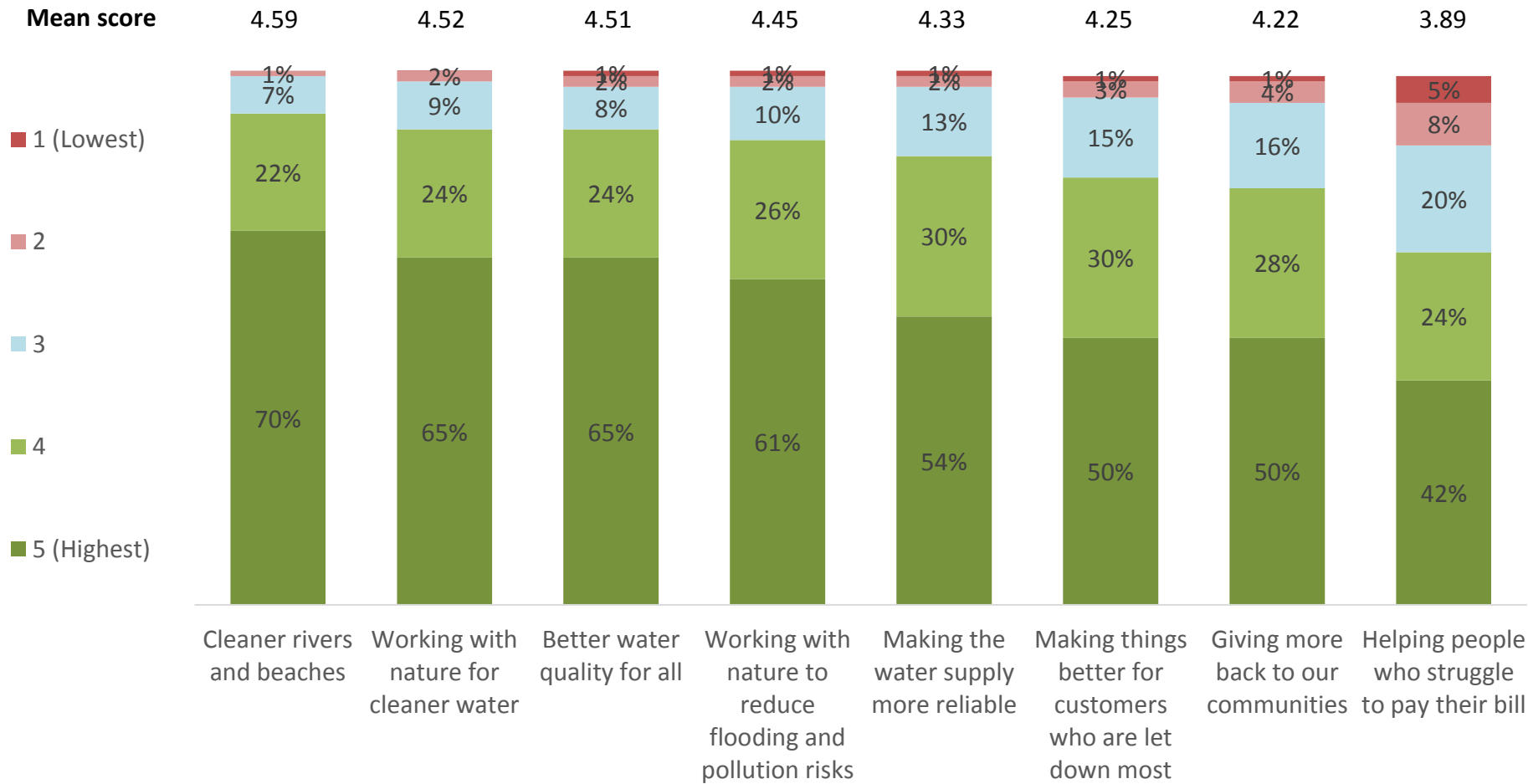
Water 2050 (Qualitative)



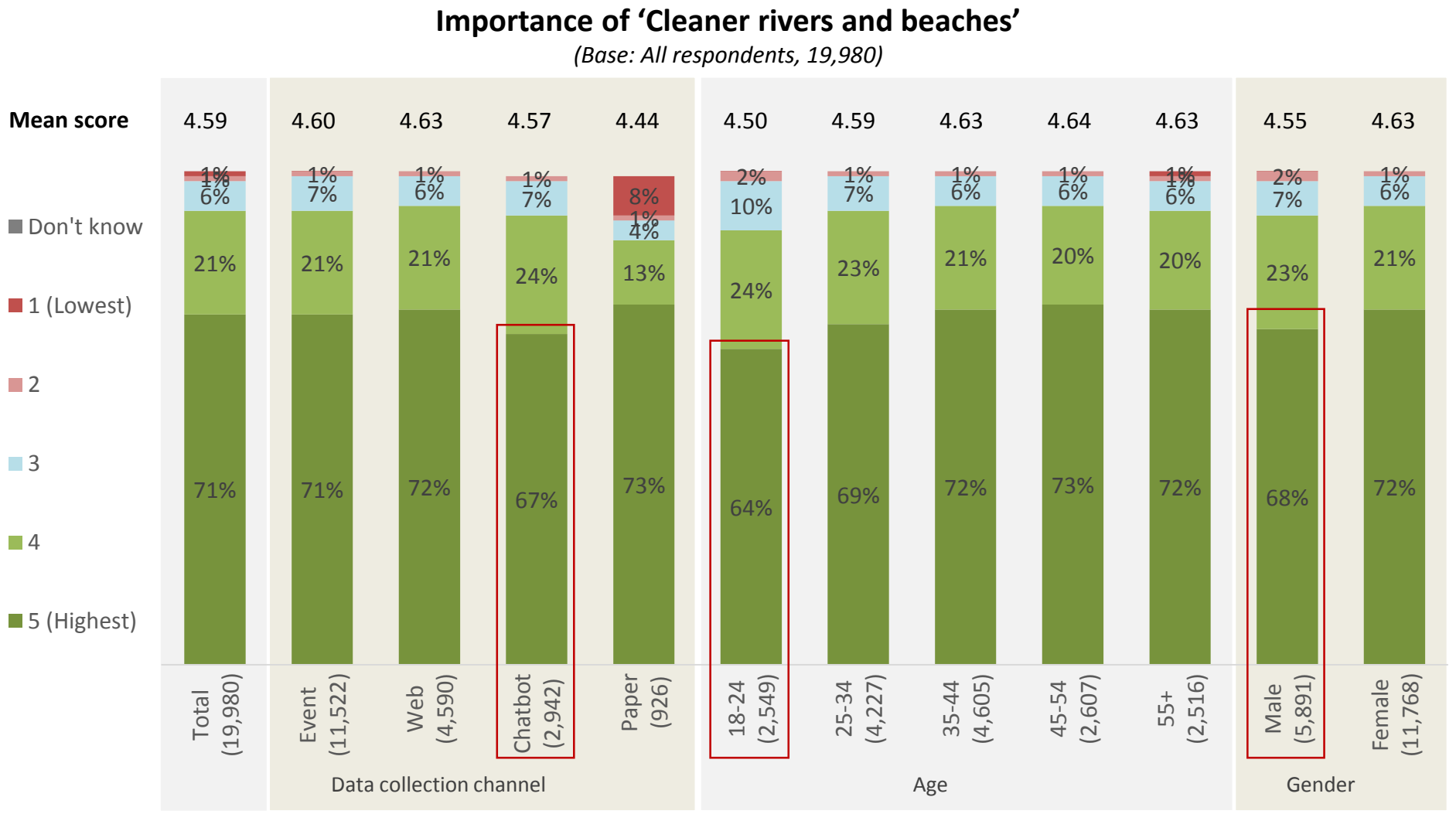
- CLEANER RIVERS & BEACHES
- SAFEGUARDING CLEAN DRINKING WATER
- IMPROVING SUPPLY RELIABILITY
- ACCEPTABLE WATER QUALITY FOR ALL
- USING NATURE TO REDUCE RISKS
- WORST SERVED CUSTOMERS

The statement with highest importance overall is ‘cleaner rivers and beaches’. Least important is ‘helping people who struggle to pay their bills’, although the majority do still say this is important (66% rate it as ‘4’ or ‘5’).

Importance
(Base: All respondents, 19,980)



This statement is given the highest importance overall and gains very high scores for all demographic groups. However – as we see for most of the statements – men and the youngest respondents give it slightly lower importance than other groups, as do those answering via the chatbot (who are a younger audience).

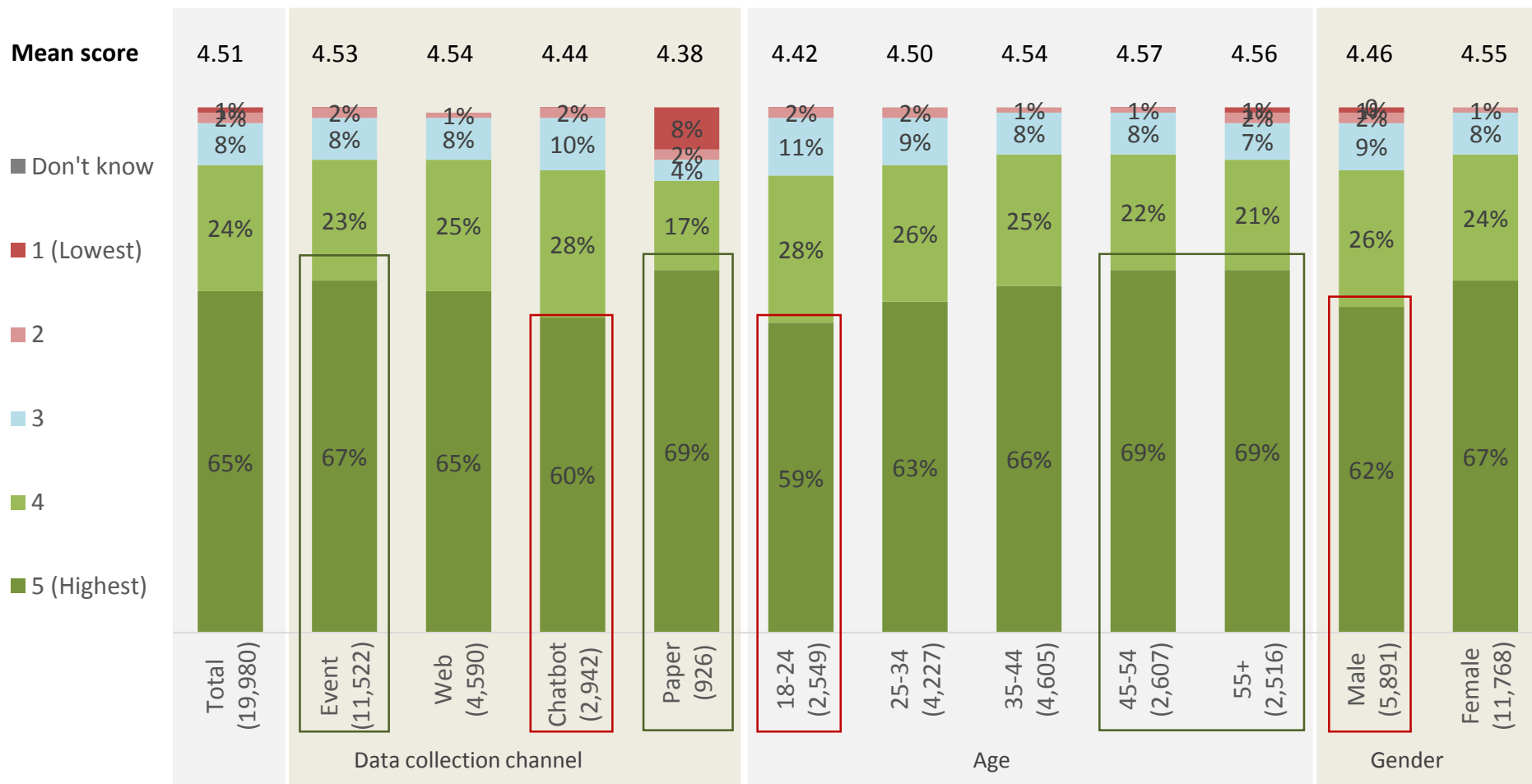


2. Working with nature for cleaner water

The second most important statement overall, with high importance amongst all the different groups. Slightly lower importance amongst those completing the consultation via the chatbot, and slightly higher importance amongst the older generation than the younger, which is a pattern common to most statements.

Importance of 'Working with nature for cleaner water'

(Base: All respondents, 19,980)

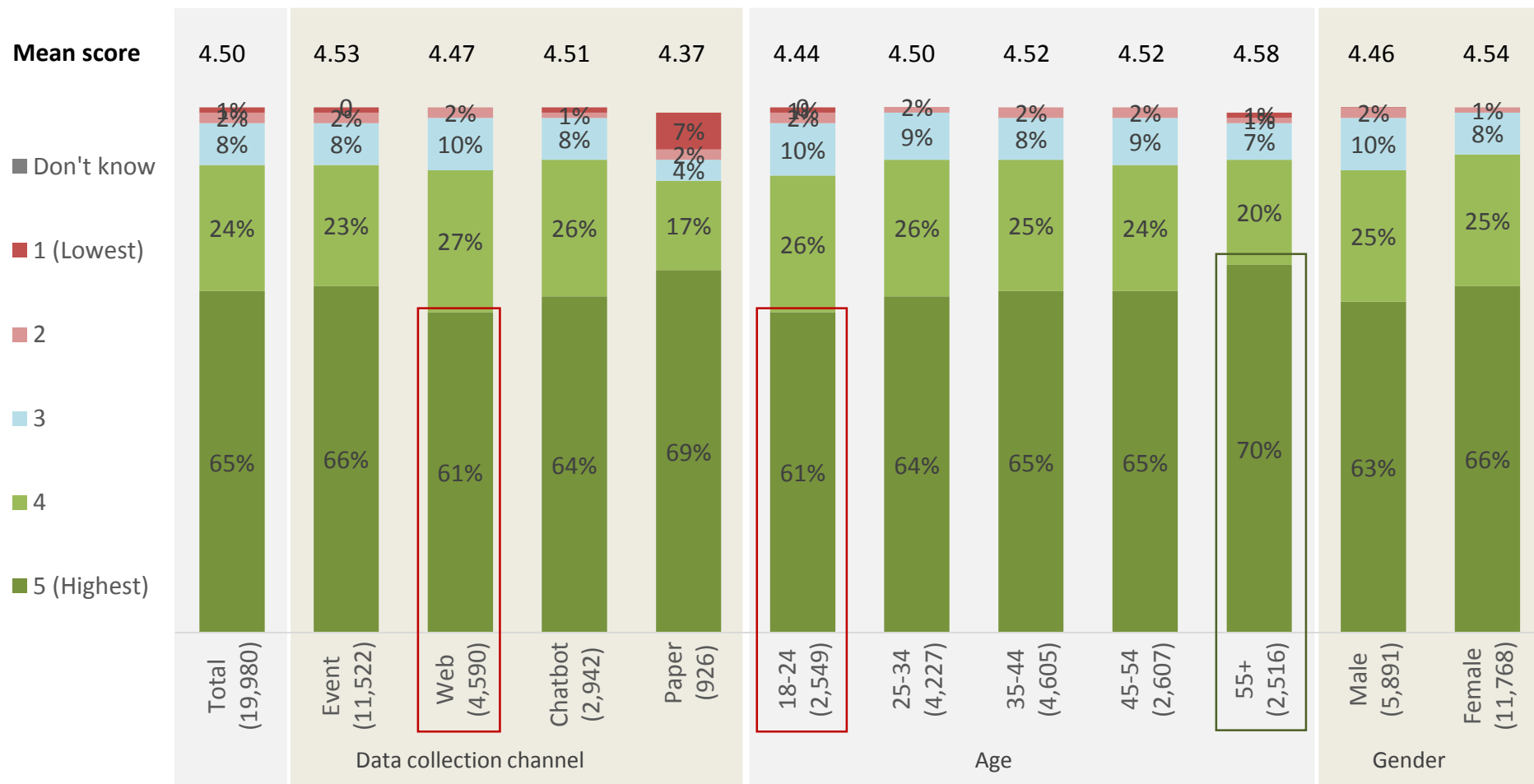


3. Better water quality for all

The third most important statement - although it's very close to 'working with nature for cleaner water.' Those on the website give it a slightly lower score than those using other channels. Notably those aged 55+ rate it more important than other age groups, while those under 25 are less concerned.

Importance of 'Better water quality for all'

(Base: All respondents, 19,980)

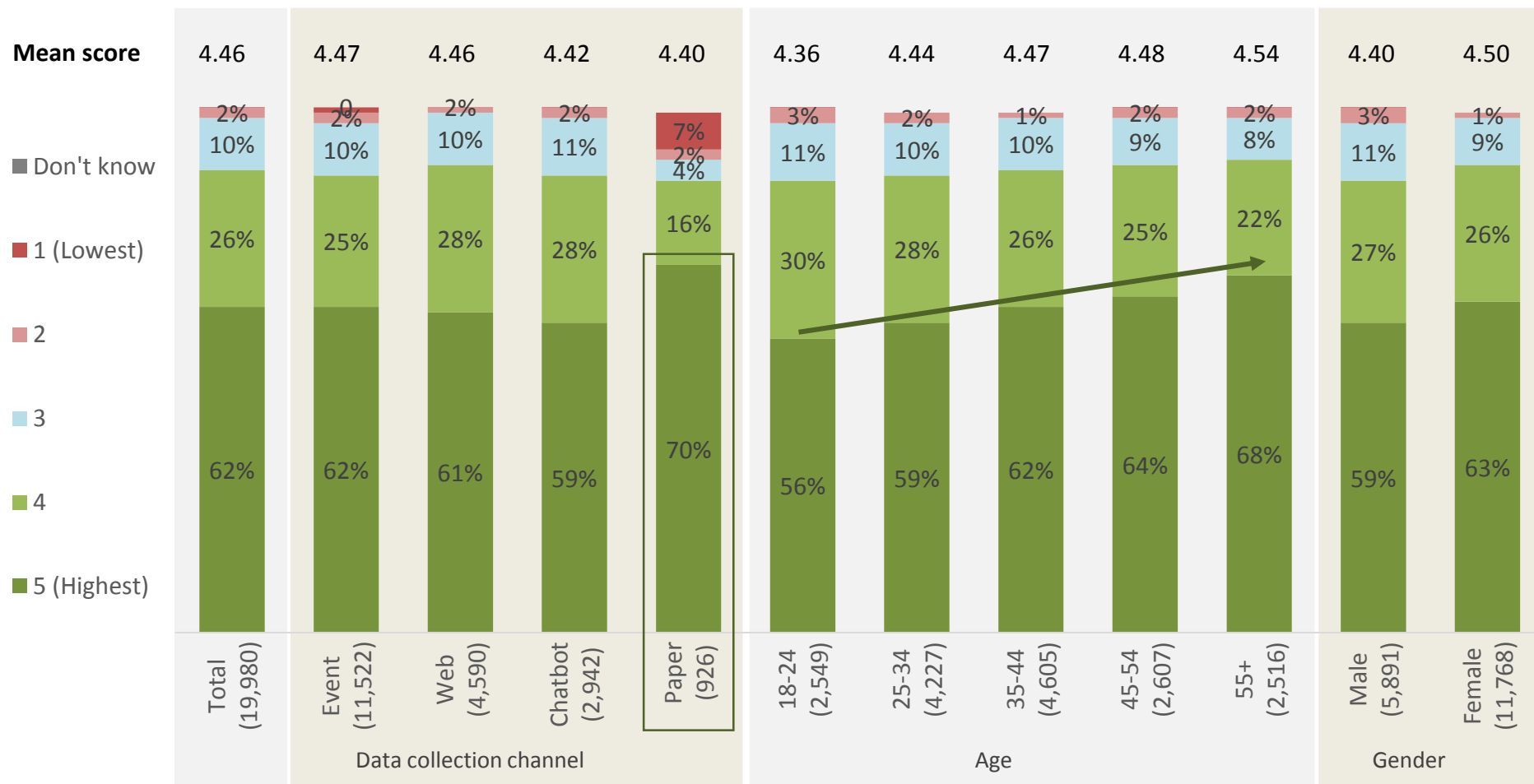


4. Working with nature to reduce flooding and pollution risks

Fourth overall in the ranking, but the majority of all groups still think it is very important, and the pattern of importance is similar to other statements. There is notable differentiation by age, with a progressive increase in importance as we move into the older age groups. Those completing on paper are also notably higher.

Importance of 'Working with nature to reduce flooding and pollution risks'

(Base: All respondents, 19,980)

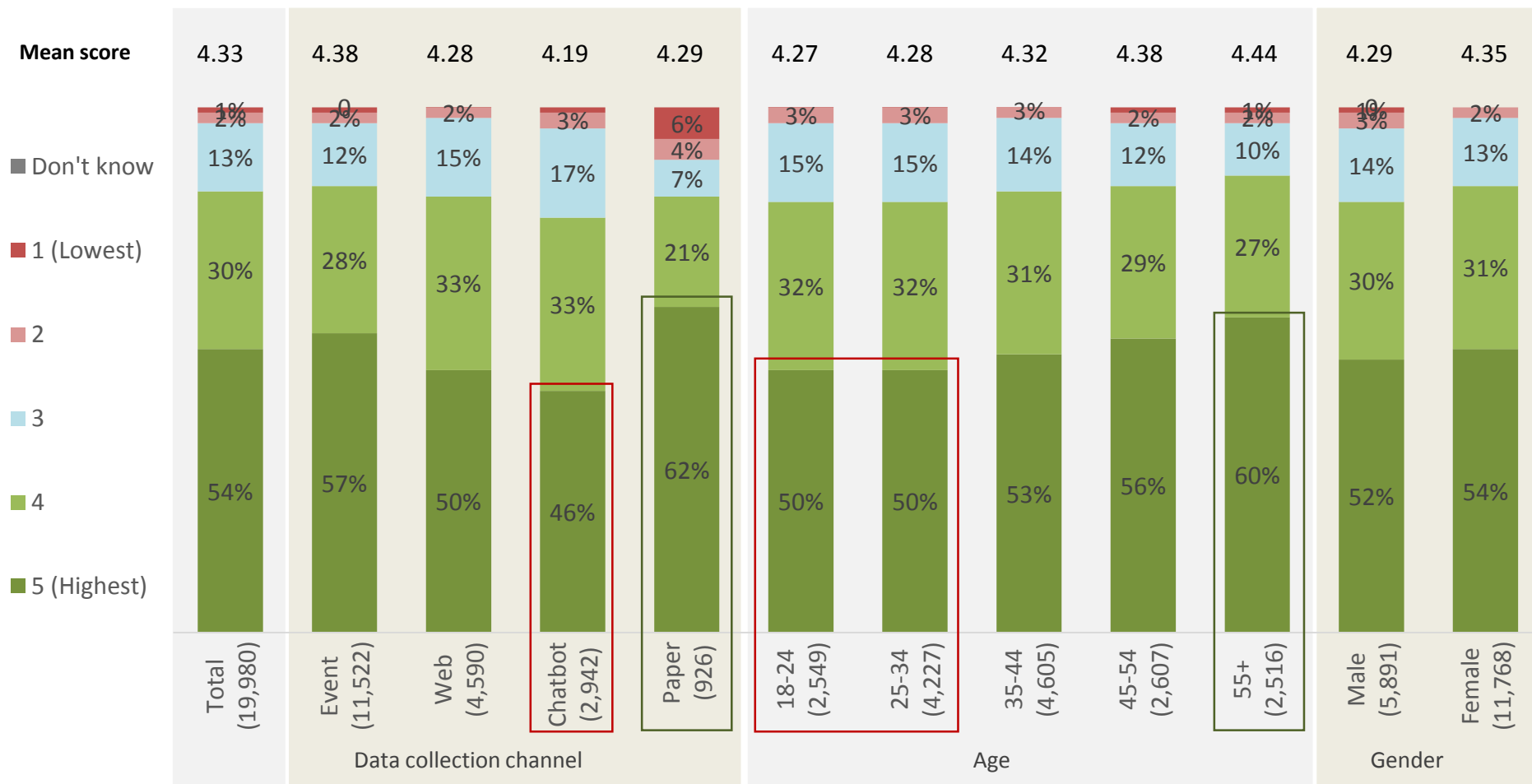


5. Making the water supply more reliable

In fifth place, importance of improving reliability is significantly lower than the previous statements – perhaps because the feeling is that reliability is already good enough. Little difference here between men and women, but those over 55 years old give it stronger endorsement, as do those completing on paper.

Importance of 'Making the water supply more reliable'

(Base: All respondents, 19,980)

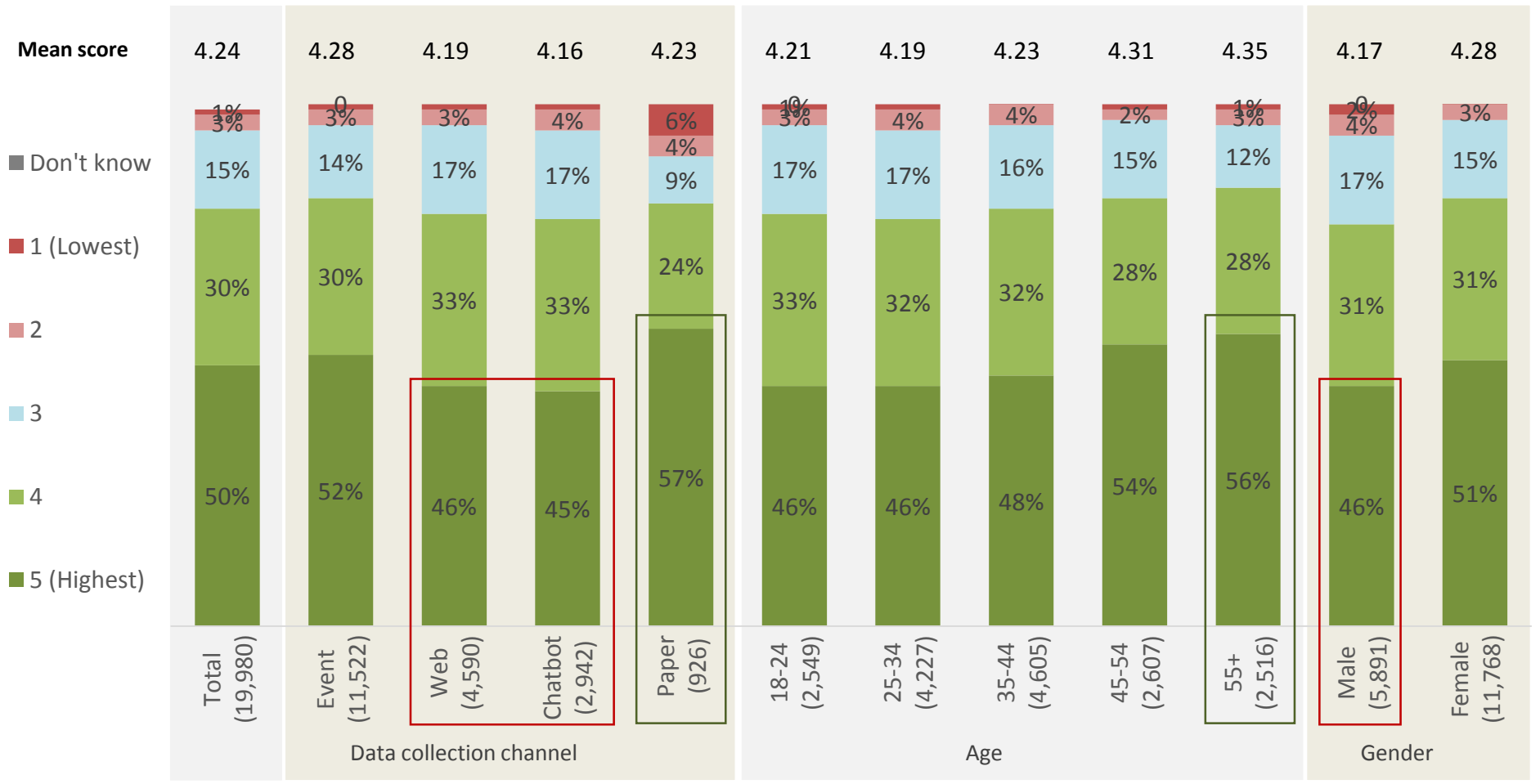


6. Making things better for customers who are let down most often 23

Sixth in the rankings, but still given highest importance by half of respondents. Those consulted on paper and aged 55+ score above average – may be driven by a mix of personal experience and social conscience.

Importance of ‘Making things better for customers who are let down most often’

(Base: All respondents, 19,980)

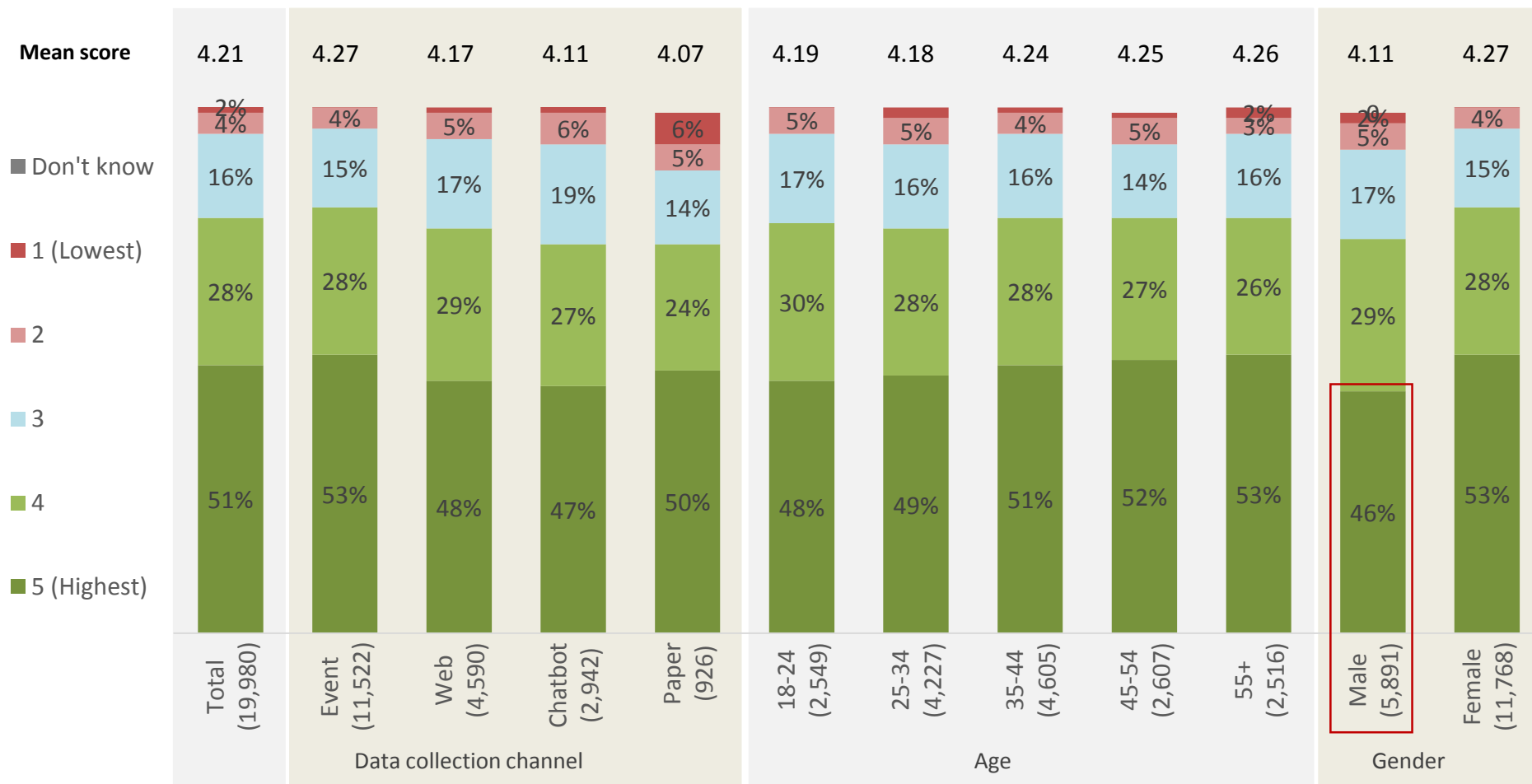


7. Giving more back to our communities

About half of respondents find this statement very important. Importance is broadly consistent across subgroups, with not much difference by age. However, it does seem women completing the consultation are a little more likely to want Welsh Water to contribute to the community than men.

Importance of 'Giving more back to our communities'

(Base: All respondents, 19,980)

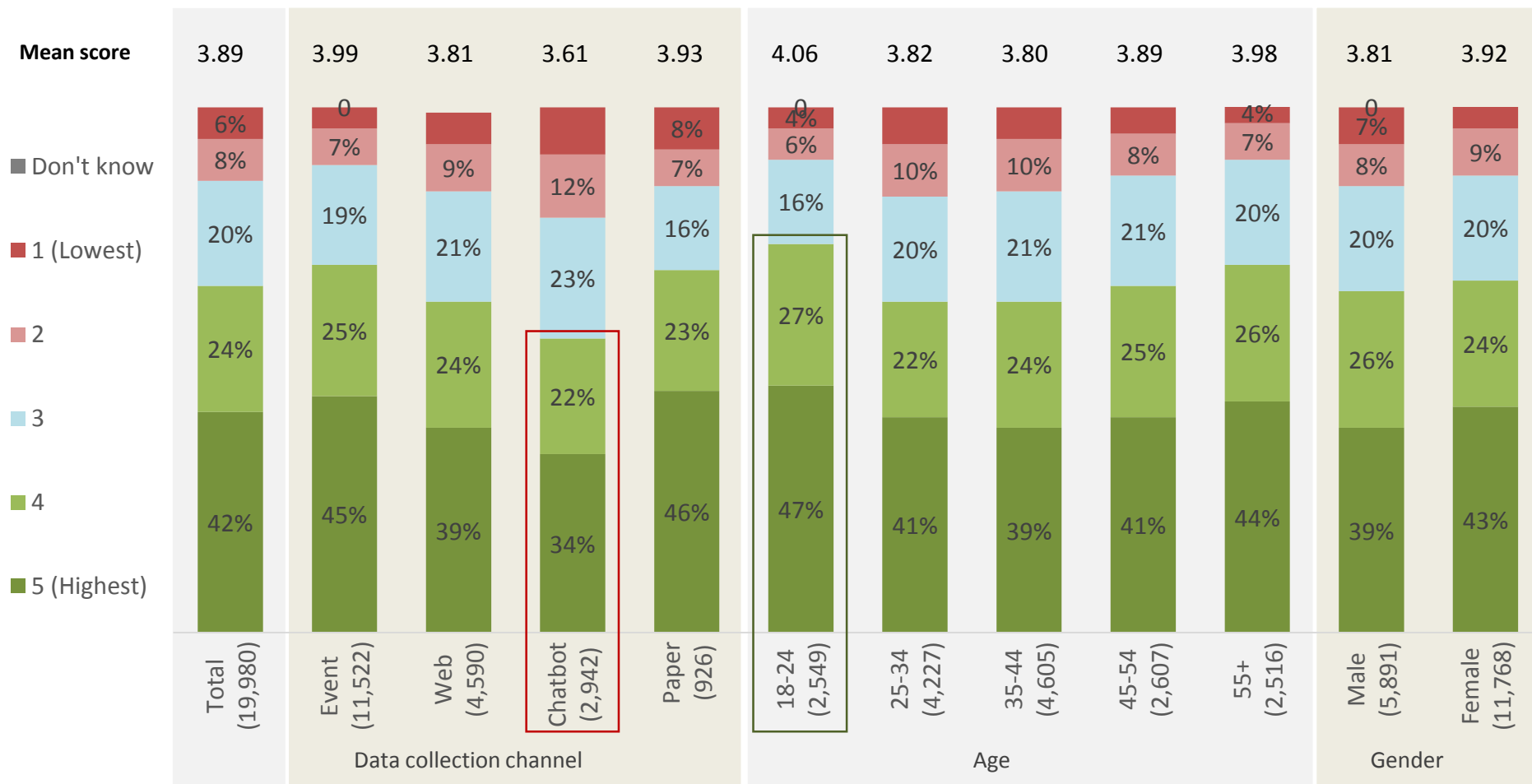


8. Helping people who struggle to pay their bill

By some margin the least important statement overall, and the most polarising. Under half rate it as '5' for importance. Unusually, here it's **the youngest age group** rating as more important than other groups – perhaps because they empathise most with this sentiment - and may themselves struggle to pay their bills.

Importance of 'Helping people who struggle to pay their bill'

(Base: All respondents, 19,980)

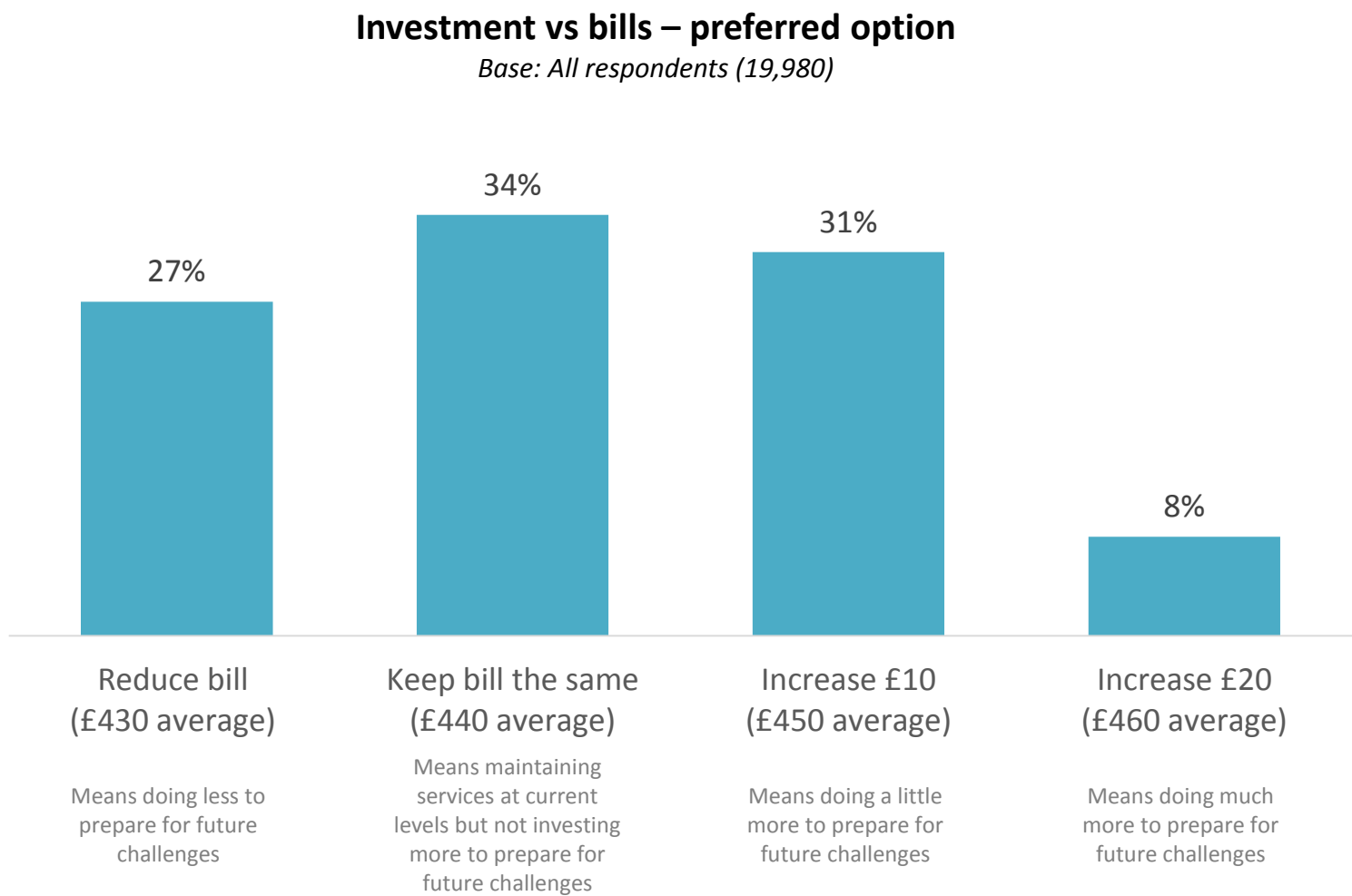


- Regardless of demographic group, all the statements are seen as important
- Three statements stand out as particularly important:
 - ‘Cleaner rivers and beaches’
 - ‘Working with nature for cleaner water’
 - ‘Better water quality for all’
- These top the list for all the demographic groups that we looked at
- When looking at customer groups, there are not dramatic differences in priorities, although there are some general patterns:
 - **Women** place slightly more importance than men on **all** statements
 - **People who are attending the events** are giving slightly more importance to the statements than people who complete the consultation on the website or via chatbot
 - **Older customers (55+)** also tend to rate most things as more important than younger groups
- The statement about social tariffs – ‘Helping people who struggle to pay their bills’ – is in last place for importance – and is a little more polarising than the others
 - It also stands out from the other statements as it’s the **youngest** group who are most likely to rate it as important – they may relate most to this sentiment



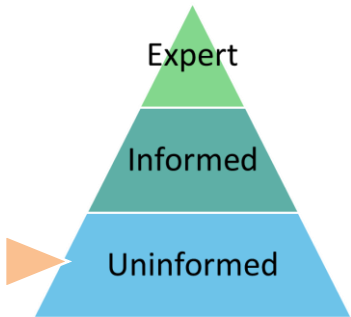
Bills vs. Investment

39% of customers vote for increasing bills (and therefore doing more to prepare for future challenges). Around a third prefer to keep the status quo, while just over one in four prefer the option of reducing bills - even if that means doing less to prepare for future challenges.



The results from the Consultation for ‘Investment vs Bills’ differs notably from the much more informed opinions in the Qualitative research for Water 2050. Being informed and educated on the subject of future investment prompts more customers to support a larger bill increase.

Summer Consultation



REDUCE BILL (£440 average)
Means doing less to prepare for future challenges

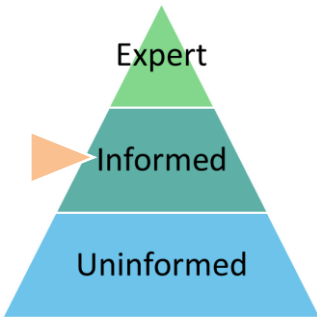
KEEP THE BILL THE SAME (£450 average)
Means maintaining services at current levels but not investing more to prepare for future challenges

INCREASE BILL BY £10 (£460)
Means doing a little more to prepare for future challenges

INCREASE BILL BY £20 (£470 average)
Means doing much more to prepare for future challenges

- 1st supported
- 2nd supported
- 3rd supported
- 4th supported

Water 2050 (Qualitative)



REDUCE BILL (£440 average)
Means doing less to prepare for future challenges

KEEP THE BILL THE SAME (£450 average)
Means maintaining services at current levels but not investing more to prepare for future challenges

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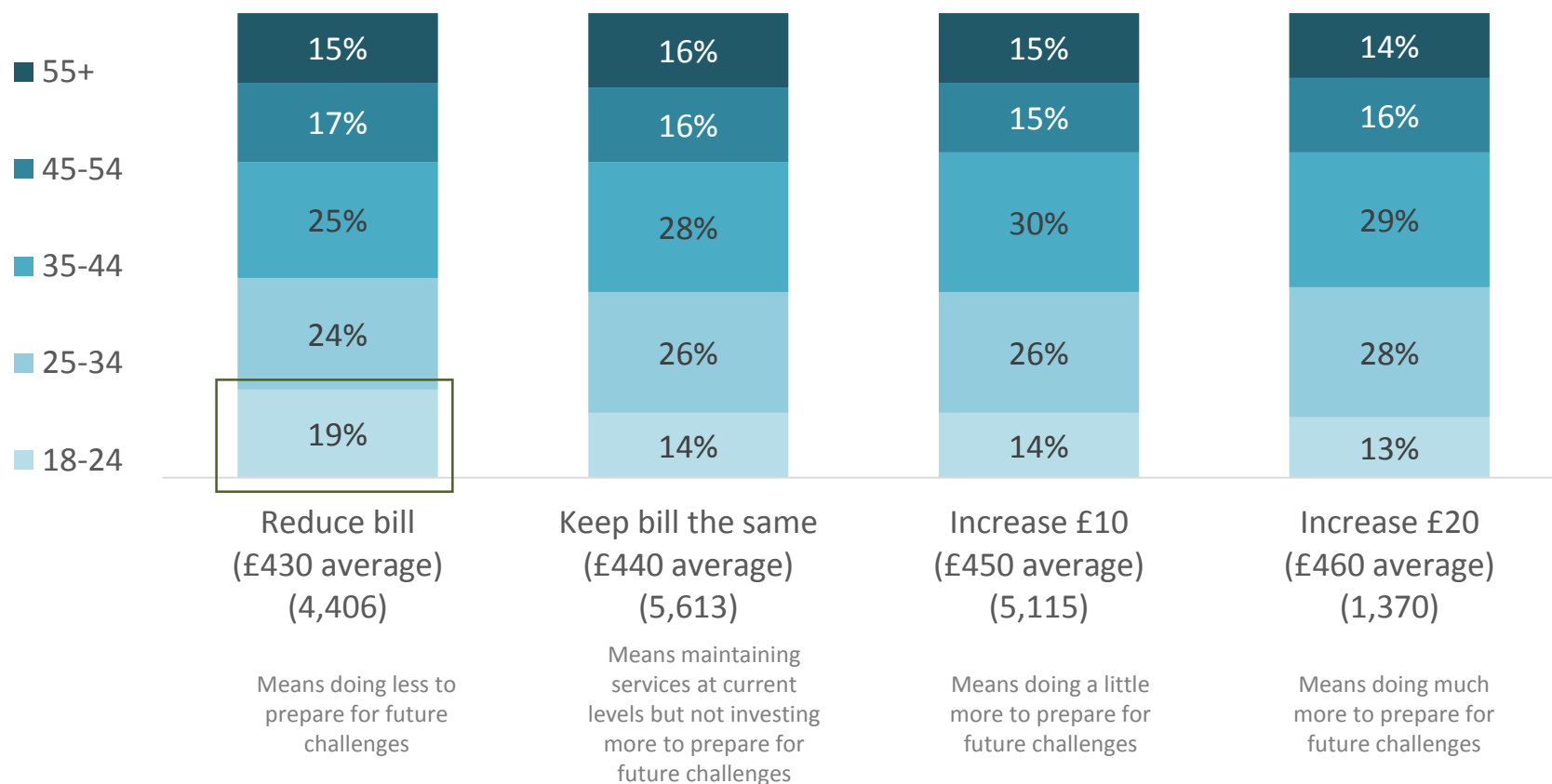
INCREASE BILL BY £20 (£470 average)
Means doing much more to prepare for future challenges

Age profile – Bills vs Investment

The age profile of those preferring to reduce their water bill is a little younger than those wanting to keep bills the same or increase them. However age does not look to be a strong driver of opinion when it comes to bill levels and investment.

Investment vs bills – preferred option

Base: All respondents (19,9980)

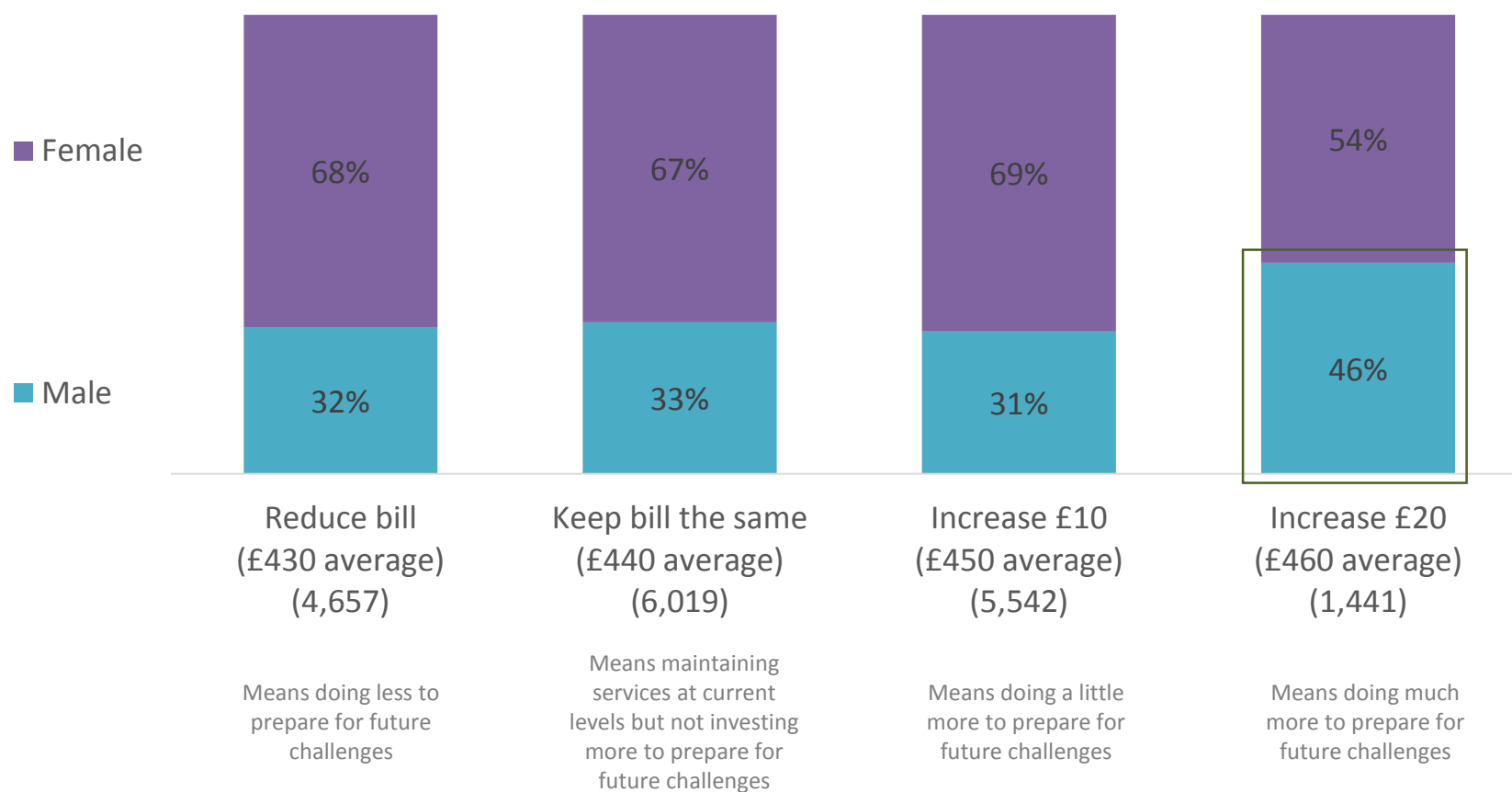


Gender profile – Bills vs Investment

Men make up a higher proportion of those willing to increase their water bill by £20 per year than those who want to keep the water bill more similar to today.

Investment vs bills – preferred option

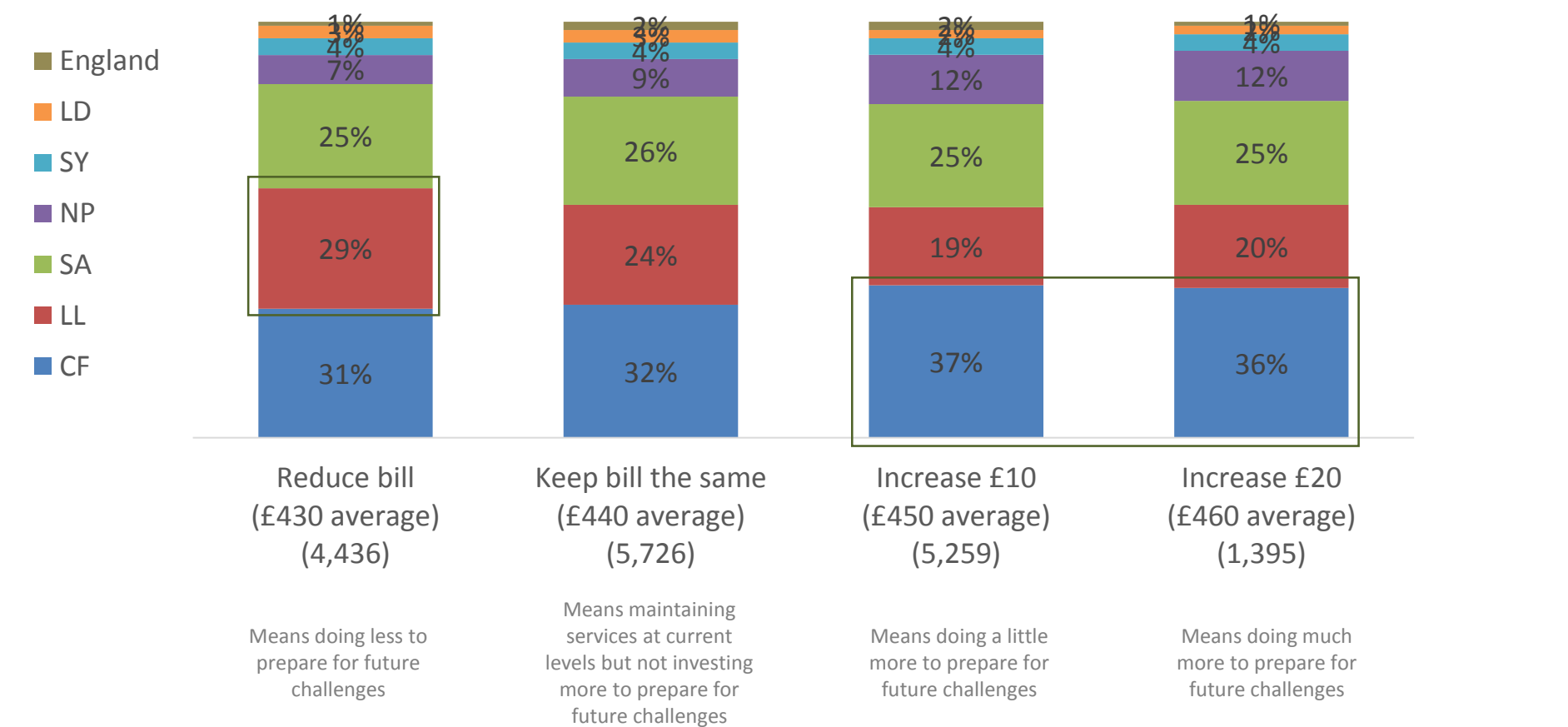
Base: All respondents (19,980)



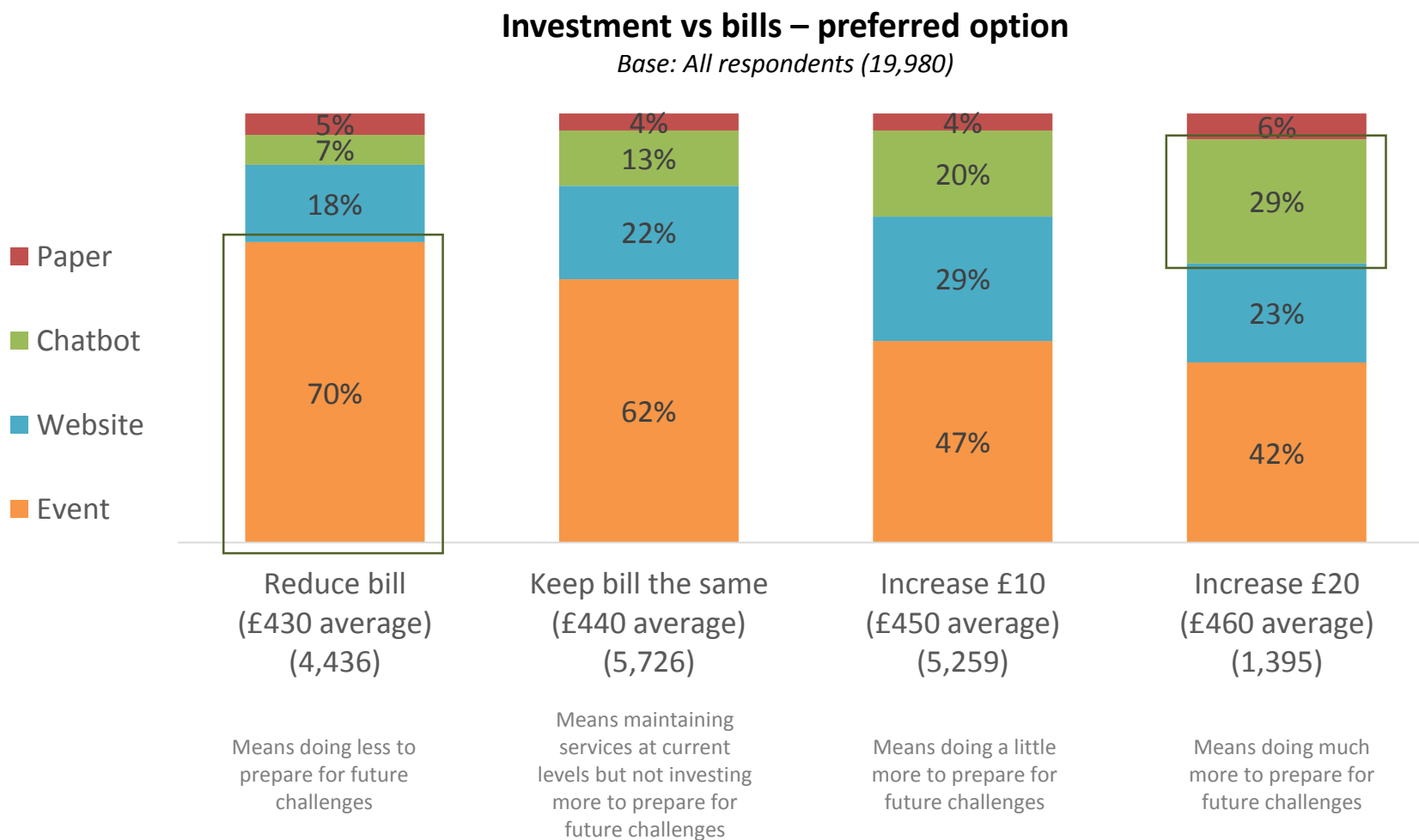
The view on bill increase is relatively similar by region, however, those wishing it to increase are slightly more likely to be from Cardiff postcodes, while those wanting to see it reduced, are more likely to be from Cardiff postcodes.

Investment vs bills – preferred option

Base: All respondents (19,980)



The view of people attending events skews more towards reducing bills, while those completing via chatbot have a greater tendency to vote for increasing bills by £20. Could the context of completing the consultation via social media lead to a more philanthropic outlook?



Importance of statements by bill preference

Those who would prefer to increase bill are more concerned about the environment. The statements they find important are 'cleaner rivers and beaches', 'working with nature for cleaner water' and to 'reduce flooding and pollution risk'.

Those who would prefer to reduce bill are more concerned about people and community. The statements they find important are 'better water quality for all', 'making the water supply more reliable', 'giving more back to our communities' and 'helping people who struggle to pay their bill'.

Statement	Groups more likely than average to rate as '5' (<u>very</u> important)
Cleaner rivers and beaches	Those who would prefer to <i>increase</i> bill by £20
Working with nature for cleaner water	Those who would prefer to <i>increase</i> bill by £20
Better water quality for all	Those who would prefer to <i>reduce</i> bill
Working with nature to reduce flooding and pollution risks	Those who would prefer to <i>increase</i> bill by £20
Making the water supply more reliable	Those who would prefer to <i>reduce</i> bill
Making things better for customers who are let down most often	-
Giving more back to our communities	Those who would prefer to <i>reduce</i> bill
Helping people who struggle to pay their bill	Those who would prefer to <i>reduce</i> bill

- There's **no consensus** about preferred bill levels in future
- The overall balance of opinion is slightly more towards increasing bills (39%) than decreasing them (27%), with the remaining one in three customers preferring to keep the status quo
- Given that customers taking part have not been informed in detail about the challenges Welsh Water faces, it's perhaps surprising that nearly 4 in 10 say they would prefer to see bills go **up**, especially given the climate of economic uncertainty
 - However, few vote for the larger bill increase of £20 per year – there's clearly sensitivity about bills going up a lot
- There are indications that customers in the youngest age group (18-24) are most likely to need to economise – they're more likely to vote for decreasing the bill, along with customers in Llandudno postcode areas
- Meanwhile male customers, and those living in Cardiff and Newport postcode areas are more likely to vote for an increase in bills to enable greater investment in future
- Those preferring a bill reduction are a little more likely to feel the more socially responsible statements are very important, while those preferring to increase their bill by £20 place more importance on Welsh Water's environmentally-oriented initiatives

A male triathlete is running on a red carpet during an Ironman triathlon. He is wearing a white and black triathlon singlet, black shorts, a black cap, and sunglasses. His race bib number is 23. He is smiling and has his arms outstretched. The background shows a large crowd of spectators, many holding up phones to take pictures. A large banner in the background reads "IRONMAN WALES CYMRU". The scene is set outdoors on a sunny day.

Summary

- Nearly 20,000 customers from a wide range of demographic groups and locations took part in the 2017 Summer Consultation
- There was a strong response through a variety of channels, including nearly 3,000 customers completing the consultation through a new bilingual chatbot
- Regardless of demographics, all the statements included in the consultation are seen as important
- ‘Cleaner rivers and beaches’, ‘working with nature for cleaner water’ and ‘better water quality for all’ are seen as most important – topping the list for all demographic groups
- ‘Helping people who struggle to pay their bills’ is seen as the least important, and is more polarising than the other statements. Notably though, this is more relevant for our youngest age group
- There’s evidence that different customer groups have different involvement with the issues in general: Older customers and women tend to rate all statements as more important, while younger customers and men are slightly more ambivalent



- There's no consensus about preferred bill levels in future
- The overall balance of opinion is *slightly* more towards increasing bills (39%) than decreasing them (27%), but opinions are very much split amongst this relatively uninformed audience
- We have seen from other research that immersion and education about the issues facing Welsh Water can change people's views to be much more in favour of (larger) bill increases; but to transform the view of the general public and gain widespread support for bill increases would require significant levels of communication
- There are signs that those preferring a bill reduction place more importance on socially responsible initiatives (possibly as they would benefit themselves), while those preferring to increase their bill by £20 place more importance on Welsh Water's environmentally-oriented action



2017 Summer Consultation

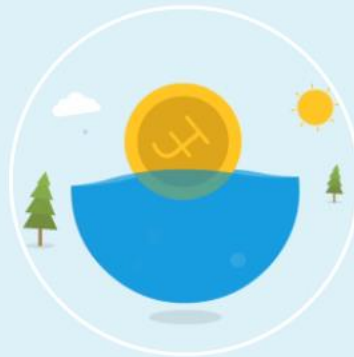
Report

6th October 2017



Appendix





For your future

Welsh Water is not for profit, it's for you.

We don't have shareholders, which means every penny we make goes back into looking after your water and environment - for now, and for the future.

Next >



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Planning Ahead

There are many challenges ahead and we've got a huge network of water pipes, sewers and treatment works to look after.

We've got plans to invest billions of pounds over the coming decades to make sure that your drinking water and environment remain great. But we can't do it all straight away, it would cost too much. So we want to know, what things are most important to you and your community.

Let's Go! >



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Better water quality for all

Our network of water pipes was installed a long time ago.

Many of the old pipes that carry water to our homes are made of cast iron which can affect the colour, taste and smell of our water.

We'll gradually replace old iron water mains to make sure our water continues to taste and look great in the future.



How important is this to you and your community?





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Working with nature for cleaner water

We expect more extreme weather in the future.

When there are storms and heavy rain, pesticides and other pollution can be washed into our rivers and reservoirs.

So we need to do more to protect the land around them.

We'll work with landowners to protect and improve the quality of the water before it reaches our treatment works.

That means we can use fewer chemicals and reduce the cost of treating water in the future.



How important is this to you and your community?





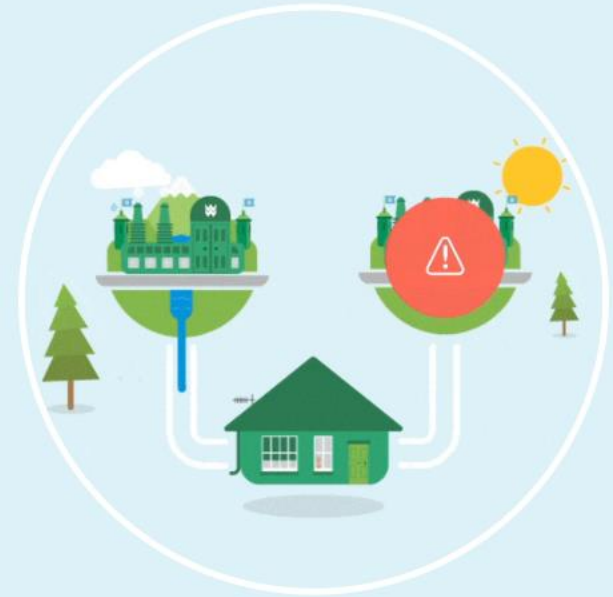
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Making the water supply more reliable

Our customers expect a constant supply of water, but it's not always possible to easily move water from one part of the network to another.

To prepare, we need to build a more flexible water network to help us transfer water more effectively between areas if there's a problem.

We will make our network more resilient and flexible so we can react quickly to any problems and keep your water flowing.



How important is this to you and your community?





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Making things better for customers who are let down most often

A small number of customers continue to face repeat problems with their water or waste water services.

Depending on where they live, these can be problems like low water pressure, discoloured water or sewer flooding.

We will target our investment to help these customers, so everyone receives a good level of service.



How important is this to you and your community?





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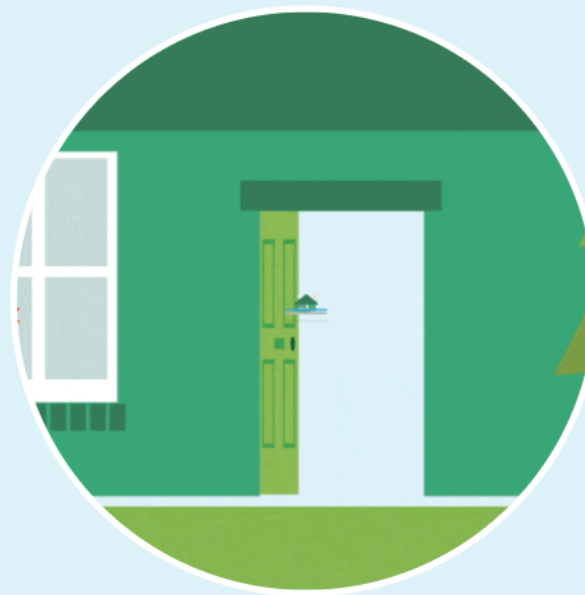
Working with nature to reduce flooding and pollution risks

The climate is changing. During heavy rain, some of our sewers struggle to cope.

This can cause homes and streets to flood, and sewage can pollute our beautiful rivers and seas.

We will do even more to reduce the amount of rain water that flows into the sewers, so we can reduce the risk that they will flood.

We call this RainScape.



How important is this to you and your community?





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Cleaner rivers and beaches

Our environment is already under a lot of pressure.

Our population is growing, the way we use the land is changing, and pollution and climate change are affecting us all.

We'll do all we can to help protect our rivers and sea by investing even more in our sewers, pipes and waste water treatment works.



How important is this to you and your community?





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Helping people who struggle to pay their bill

For many, times are tough. Some people really struggle to pay their water bills.

We already help over 80,000 people in genuine need every year by reducing their bill.

We will do even more to help.

We would spend more to help these people, but this would mean that most of our customers would be paying a little extra on their bill to help those struggling the most.



How important is this to you and your community?





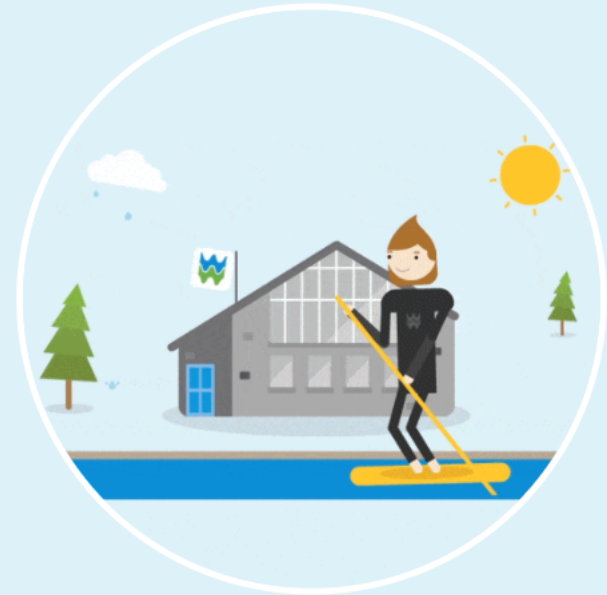
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Giving more back to our communities

One of the ways we help to make our communities healthier, greener and more prosperous is by helping people to appreciate the importance of water and the environment.

Our education team offer free lessons to over 50,000 children each year, and we have four free visitor centres across Wales for you to enjoy.

We will expand our education programme and campaigns, offering more recreation facilities at our reservoirs or getting involved in projects to help you and your environment stay healthy and happy.



How important is this to you and your community?





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Investment vs Bills

We want to get the balance right between doing more to prepare for these challenges and keeping your bills affordable.

Which would be your preferred option?

Reduce bill (£430 average)

Keep bill the same (£440 average)

Increase £10 (£450 average)

Increase £20 (£460 average)



Order of importance by subgroup

The order of importance is very consistent across different groups completing the consultation. The only differences are that those who were consulted via a paper questionnaire ranked 'Working with nature to reduce flooding and pollution risk' higher up the list, and those aged 55+ ranked 'Better water quality for all' above 'Working with nature for cleaner water'.

Mean score (On a scale of 1 to 5)												
	Total	Data collection channel				Age					Gender	
		Event	Web	Chatbot	Paper	18-24	25-34	35-44	45-54	55+	Male	Female
Cleaner rivers and beaches	1	1	1	1	1	1	1	1	1	1	1	1
Working with nature for cleaner water	2	2	2	2	3	2	2	2	2	3	2	2
Better water quality for all	3	3	3	3	4	3	3	3	3	2	3	3
Working with nature to reduce flooding and pollution risks	4	4	4	4	2	4	4	4	4	4	4	4
Making the water supply more reliable	5	5	5	5	5	5	5	5	5	5	5	5
Making things better for customers who are let down most often	6	6	6	6	6	6	6	6	6	6	6	6
Giving more back to our communities	7	7	7	7	7	7	7	7	7	7	7	7
Helping people who struggle to pay their bill	8	8	8	8	8	8	8	8	8	8	8	8

↑
IMPORTANCE