Dŵr Cymru Welsh Water

Ref 5.2.1

PR19 Customer research summary by MoS

September 2018

This document summarises the customer research results from our wide range of studies relating to measures of success and performance commitments. This has been used as back-up when setting the commitments.

Clean safe water for all

Performance measure	Wt1 Tap water Quality Compliance Risk Index (CRI)	
Research	**Date**	**Customer feedback**
Water2050 Qualitative (Blue Marble)	July-2017	• Achieving acceptable water quality for all customers was seen as fundamental for health and life P.21. • Good infrastructure seen as critical to achieving high quality water P.21. • However, some would prefer to see distinction between potable water and water for other uses (where quality less critical) P.21. • Agree with principle that all should receive same water quality P.21.

Performance measure	Wt2 Water Supply Interruptions	
Research	**Date**	**Customer feedback**
Resilience (DJS)	Oct-16	Uninformed view: • Across participants there was a feeling that a short half day interruption wouldn't prove too problematic and is something they would "just get on with it". Around 1-5 half day interruptions per year would be seen as acceptable as long as planned. P.14. • This was particularly prominent amongst domestic customers who think that they would just find a way to cope with this level of interruption. However, special provisions for vulnerable groups should be made. P.14. • Most business customers felt that they would cope with such small scale interruptions but would be less forgiving of more frequent interruptions. P.14. • During an event WW should: Working to get the water back ASAP Additional provisions should be put in place and delivered (i.e. *bowsers, bottled water given out etc.…)* P.29. • On-going communication (especially key for businesses) P.29. • Outside of an event ww should: build bigger pipes and maintain them so that they can more easily cope with large amounts of flood water P.29. • Have contingency plans in place with a number of additional agencies (i.e. Environment Agency, emergency services etc.) so that different scenarios can be planned for in advance P.29.

		• Provide communication around how extreme events will be handled should they occur (i.e. in advance, on the website) P.29.
Customer Priorities (Blue Marble)	Oct-16	• Customers prioritised ensuring reliability of supply into the future. P.13.
WTP Qualitative research (Accent)	Aug-16	• Important area as ‘continued supply’ is seen as WW core business but 3-6 hours is manageable interruption P.17. • More accepting of those outside Welsh Water’s control e.g. weather P.17.
Deep Dive: Worst served (Blue Marble)	March-17	• Interruption to supply impact depends on length of time 6hrs is inconvenient but 6 hrs plus has higher impact. DCWW not always held responsible-out of our control. P.14.
Have your say (Blue Marble)	Sept-17	• 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. P.22.
Water2050 Qualitative (Blue Marble)	July-2017	• Improving the reliability of drinking water supply systems was seen as a fundamental aim - disruptions to be avoided - but customers don’t see as a current problem area P.19. • Some argue that quality is more important than reliability p.19.
Performance targets qualitative (Accent)	Jun-17	• Continuous supply is critically important P.51. • Business and vulnerable customers need zero interruptions and general households require minimal interruptions P.51. • Generally positive experience P.51. • Minority had unplanned interruptions for 4-6 hours but purchased bottled water, went to friends, etc P.51. • Up to 3 hours planned = no problem to get by e.g. fill buckets, buy bottled water P.51. • Welcome text messages with estimates or advice e.g. run tap for a while once back on P.51. • WTP = very limited P.51. • 12.2 minutes to 10 minutes = £5 for 2 minutes improvement feels unjustified P.51. • Some concerns about expressing this as an average P.51. • Loses meaning P.51. • Up to 3 hours = acceptable P.51. • More than 12 hours = unacceptable P.51. • Expect future technology to eradicate supply interruptions e.g. self-mending pipes, etc P.51. • 98% voted to keep investment as now (12.2 minutes of water supply lost per property per year on average) p.50

		• 2% voted for £5.00 increase to annual bill (10 minutes of water supply lost per property per year on average) p.50

Performance measure	Wt3 Acceptability of drinking water	
Research	**Date**	**Customer feedback**
WTP Qualitative research (Accent)	Aug-16	Discoloured water • Discoloured water currently not a common occurrence. P.13. • Idea of discoloured water is HUGELY off-putting – unhygienic, 'puddle water' P.13. • Most customers would avoid drinking it P.13. • Reluctant to use it for any purpose except flushing the toilet P.13. • Would (and some do) purchase bottled water P.13. • Week = significant time period and expensive to source alternative P.13. Taste and smell • Concept of poor tasting / smelling water is problematic • A number had experienced this at some point but usually rectified quickly without intervention P.15. • It is seen as a key area to address P.15. • Drinking water is critical to good health and service failures make this prohibitive P.15. • Few days = not a long time but would be concerned if the problem was recurring P.15.
Performance targets qualitative (Accent)	Jun-17	• Important issue but current levels of drinking water appearance, taste and odour are acceptable for the vast majority of participants P.46. • 18% vote for an improvement in performance P.46. • Critical importance P.47. • Generally positive experience P.47. • Welsh water tastes and looks good P.47. • Trust Welsh Water to deliver high quality product P.47. • Recognise Welsh Water's rural footprint – more challenging than other water companies P.47. • Therefore even with comparatively poorer performance (map and graphs), customers are satisfied P.47. • WTP = very limited P.47. • Happy with status quo P.47. • 2.3 out of 1,000 households feels very low P.47. • Historic performance shows reduction in contacts P.47.

		• Proportional decrease in contacts for significant bill rises are unjustified P.47. • Minority in Hereford, where limescale was a concern, would accept an increase P.47. • 82% voted to keep investment as now (2.3 contacts per 1,000 population) p.46 • 14% voted for £6.00 increase to annual bill (2 contacts per 1,000 population) p.46 • 4% voted for £16.00 increase in annual bill (1.6 contacts per 1,000 population) p.46
Resilience (DJS)	Oct-16	• Poor service experience would destroy trust. P.8. • Cost implication for customer we should consider such as electricity cost of boiling water or cost of buying bottled water. P.32. • During and event ww should: Alternative supplies should be offered to those affected (especially the vulnerable). P.34. • Communicate clearly what you can and can't use your water for. P.34. • Expect compensation claims, especially from businesses. P.34. • Outside of an event: Have multiple safeguards & checks in place to ensure that this couldn't happen P.34. • Businesses and domestic customers were more inclined to view water quality as something that should be constantly planned for. A constant monitoring process should be in place whereby this simply shouldn't ever be an issue. P.51.
Deep Dive: Worst served (Blue Marble)	March-17	• Water discolouration only seen as a minor impact but little understanding of if it's safe to drink. P.16.
Have your say (Blue Marble)	Sept-17	• 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. P.20.
Water2050 Qualitative (Blue Marble)	July-2017	• Achieving acceptable water quality for all customers was seen as fundamental for health and life p.21. • Good infrastructure seen as critical to achieving high quality water p.21. • However, some would prefer to see distinction between potable water and water for other uses (where quality less critical) p.21. • Agree with principle that all should receive same water quality p.21.

Performance measure	Wt4 Water mains bursts	
Research	**Date**	**Customer feedback**
Performance targets qualitative (Accent)	Jun-17	• Important area as this is Welsh Water's core estate and operational equipment P.80. • Recognise that dealing with very old infrastructure and pipework AND in a much more volatile climate P.80. • Balance needed between new builds and repairs of existing assets P.80. • Advantage of new builds is innovative materials that are more environmentally friendly and sustainable e.g. new pipe work might be more resistant to freezing weather P.80. • BUT essential work needs to be done on ongoing repairs (in partnership with local authorities to minimise disruption) P.80. • Important and want to see Welsh Water investigating more innovative and future proof materials P.80. • Mains bursts= getting better over time P.80.

Performance measure	Wt5 Water process unplanned outages	
Research	**Date**	**Customer feedback**
Resilience (DJS)	Oct-16	• Business and domestic customers would be a lot more understanding of an extreme event caused by an Act of God than the negligence of Welsh Water. P.26.

Performance measure	Wt7 Water Catchments Improved	
Research	**Date**	**Customer feedback**

Environment (DJS)	March-18	• Low awareness of the term catchment management however once explained, this is seen as an area that could have a key role P.39.
		• Thought if Welsh Water stops the problem at the source, the rest of its job will be easier p.39.
		• Land owners also going to have to play a key role p.39.
		• Mixed views on subsidising the industries that cause more pollution P.40:
		  o At one end of the scale, customers think these industries should stand on their own two feet
		  o Some believe that it is about educating the industries
		  o At the other end of the sale, customers think that it's a good thing for Welsh Water to be involved with

Water2050 Qualitative (Blue Marble)	July-2017	• Support for preventing pollution at source: better for nature and wildlife; natural solutions more sustainable than hi-tech ones p.17. • Many uncomfortable with (more) chemical treatments p.17. • Likely to be cost effective in long term p.17. • *Prevention is better than cure* p.17. • *Natural better than chemical* p.17. • High support for work with farmers to prevent pollution p.18

Performance measure	Wt8 Lead Pipe Replacement	
Research	**Date**	**Customer feedback**
Water2050 Qualitative (Blue Marble)	July-2017	• Some surprised at proportion of iron pipework remaining p.21. • Good infrastructure seen as critical to achieving high quality water p.21. • High support for replacing iron pipes with reliable plastic ones p.22. • Health risks not known by most (and some surprised to see lead pipes still used); many satisfied that if this were a serious risk it would have been remedied p.23. • Some see this as a very clear-cut strategy and easier to endorse: feel strongly that DCWW has an obligation to remove any lead risk from the system (more prominent among 'DE' customers and those who have experience of lead) p.23. • Whereas others do not perceive a problem (esp. older); and see that householders are responsible p.23. • Clear role for DCWW is to make affected customers aware of situation p.23.

Safeguarding our environment for future generations

Performance measure	En3 Pollution Incidents from Wastewater	
Research	**Date**	**Customer feedback**
WTP Qualitative research (Accent)	Aug-16	• The desire for Welsh Water to have a strong environmental conscience and to reduce impact of pollution makes this service measure an important priority P.28. • Demonstrates that WW are future focused P.28. • Shows that they are committed to the environment P.28.
Performance targets qualitative (Accent)	Jun-17	• Very important area to address P.30. • Fears over impact of this on health and lifestyle P.30. • Recent flooding incidents (Carmarthen) make this very real for people P.30. • Idea of sewage or industrial pollution in rivers is upsetting for many and detrimental to business P.30. • Personally use many local paths/rivers without thinking about this e.g. Taff Trail in Cardiff – would be terrible to have to avoid areas P.30. • Looking for real examples of where DCWW have made a difference P.30. • WTP = majority accept a small increase to reduce number of pollution incidents below 100 P.30. • £7.50 seems like a large increase in the annual bill and difficult to justify (ok in Haverfordwest/Hereford) P.30. • £2.50 acceptable starting point and then for DCWW to prove they are dealing with this P.30. • Historical data is very encouraging and shows that DCWW are addressing this issue P.30. • Keen to know what they are actually doing that is successful P.30. • 31% voted to keep investment as now (103 minor pollution incidents) p.29 • 57% voted for £2.50 increase to annual bill (90 minor pollution incidents) p.29 • 12% voted for £7.50 increase in annual bill (70 minor pollution incidents) p.29

Performance measure	En4 Leakage	
Research	**Date**	**Customer feedback**
WRMP Qualitative (Accent)	Jan-17	• Leaks = Highly emotive topic P.26. • Portrays WW as careless/inefficient P.26. • Feels hypocritical as consumers encouraged to save water P.26.

		• Bad for the environment P.26. • Wasteful and immoral P.26. • Majority understand the concept of 'economic level' BUT it feels uncomfortable P.26. • Choice of saving £ (rational) vs. water (emotional) P.26. • Minority feel that it's important to address all leaks, reduce any wastage and then future proof the repairs P.26.
Performance targets qualitative (Accent)	Jun-17	• Critical importance P.26. • Huge emotional response – wasteful, immoral, unfair, unforgiveable of DCWW when some global areas are water stressed P.26. • ELL understood but environmental vs. £££ arguments made – just a sense that something needs to be done to protect precious resource P.26. • Recognise that Welsh Water's rural landscape makes detection and replacement challenging P.26. • Want reassurance that new materials are sustainable • WTP = just under a half WTP for improvements esp. Hereford where 3/4s would pay highest amount £1.10 (and younger generation) P.26. • Historical data is very encouraging P.26. • £1.10 seems a very small amount to tackle this problem • However, those against feel that a 7 litre reduction doesn't feel significant (worth scaling up 7 litres x 1.3m houses x 365 days) P.26. • 53% voted to keep investment as now (121 L per property leaked per day) p.25 • 16% voted for £0.66 increase to annual bill (117 L per property leaked per day) p.25 • 31% voted for £1.10 increase in annual bill (114 L per property leaked per day) p.25

Performance measure	En6 Km river improved	
Research	**Date**	**Customer feedback**
WTP Qualitative research (Accent)	Aug-16	• Customers like the fact that WW have this as a service measure • Shows wider responsibility and demonstrates how they manage waste water P.30. • Only 30% of rivers are 'at least good' – doesn't sound very good? P.30. • It is understood that WW have responsibility to control and effectively manage wastewater but limited impact on day to day world reduces overall importance P.30.
Environment (DJS)	March-18	• The overall impression is that the rivers in Wales have improved a lot in the last few years, seeing more wildlife, they look cleaner, less litter, assume more stringent checks are in place these days P.18.

		• Customers were genuinely surprised that only **37%** of rivers are meeting "good" status, with expectations being a lot higher than this P.19. • Sceptical as to whether EU legislation on rivers will still stand up after Brexit P.19. • Whilst Welsh Water may be seen as a lead agency, there is a perception that they should work in conjunction with other agencies P.20.
Have your say (Blue Marble)	Sept-17	• Cleaner river's and beaches ranked highest importance overall. P.18.
Water2050 Qualitative (Blue Marble)	July-2017	• Consistently high importance driven by importance of tourism to Wales and personal significance of Wales' natural environment P.29. • But lower priority than the 'top ranked' set of strategies: in part because this area seen as much the responsibility of others (NRW, EA) as DCWW P.19.

Performance targets qualitative (Accent)	Jun-17	• Important to protect countryside and rivers P.34.:
		    o Protect income from tourism
		    o Local population recreation
		    o Wildlife
		    o Health and wellbeing
		• Sense that considerable improvements have been made over last 25 years P.34
		• 'Significant visible pollution' is abhorrent P.34
		• Keen to see DCWW working with local farmers to reduce spraying, etc P.34
		• Need to prioritise which rivers to improve e.g. some extreme rural areas feel less important as less people will use/enjoy them P.34
		• WTP = less appetite to increase bills in Cardiff and Hereford P.34
		• £2.50 feels like relatively small amount for high KM of rivers improvements (150km) P.34
		• Background data shows only 35% of rivers achieve 'good' status and that doesn't feel high enough P.34
		• Reasons for not achieving good status indicates that this is a wider issue and responsibility should be shared by local authorities and developers P.34
		• 27% voted to keep investment as now (no improvements) p.33
		• 44% voted for £2.50 increase to annual bill (150kms river improved) p.33
		• 29% voted for £3.75 increase in annual bill (225kms of river improved) p.33

Personal service that's right for you

Performance measure	Sv1 Household Customer Satisfaction (C-Mex)	
Research	**Date**	**Customer feedback**
Customer Service Expectations (Blue Marble)	March-17	• Product quality, reliability and safety is a basic expectation P.8. • Experience is better than other utilities for most and no experience is seemed to be good service p.13. • Increasing awareness of NFP p.13. • Communication channels are all relevant in different circumstances- most likely to use telephone and website. P.27. • High expectation that dcww would use txt messaging to keep customers informed P.28. • Don't expect to re-tell previous notes/experience P.28. • Priority flags on our system for disabilities, economic vulnerability and Welsh lang. P.28. • Expectations increasing for services which match other companies (especially from future customers) P.39. o Gps tracking o Time slots for work to be done/staff to arrive o Greater use of technology
Water2050 Qualitative (Blue Marble)	July-2017	• Relatively less important than other 14 strategic responses P.16. • Poor customer service a lesser evil than no service at all…(and less important if service performance is very high) P.16.
Performance targets qualitative (Accent)	Jun-17	• Believe that they would receive 'good' service if they needed to call P.84. • Delivering good customer service is seen to be a hygiene factor for any business P.84. • Water is such an essential service that dealing with problems efficiently and effectively is critical P.84. • Surprised by some of the figures – only on a par with competitors AND dealing with calls first time (200k out of 1m) feels like a low ratio o Why can these not be resolved first time? P.84. • JLP, Amazon, Apple all cited as trustworthy who deliver basics and surprise and delight factors P.84. • Seen as important P.84. • Doing about the same as other companies BUT would have expected DCWW to be better than average P.84. • For the future: o Maintain local call centre with local staff who have knowledge of the geography

		o Improve number of issues resolved 1st time o Develop live-chat facilities and easy to navigate website options e.g. current works/supply interruptions P.84.

Performance measure	Sv2 Developer services satisfaction (D-Mex)	
Research	**Date**	**Customer feedback**
Developer services survey (Strategic Research and Insight)	Feb 2017	• Contact preferences- Most popular or phone and email. Least popular is webchat. P.7. • Significant improvements from prev year's scores with regards to response time, consistency of info, knowledge of staff. P.8. • 89% did not express dissatisfaction any aspect of their last contact with Developer Services (up from 73% last year) P.9. • 50% are content with the service and could not suggest any improvements P.10. • The remaining stakeholders offered the following suggestions P.10: o Speed up the process and improve the response times o Have a one to one direct contact at Welsh Water e.g. a case manager o Direct dial telephone numbers rather than dealing with a call centre o Would like to see the return of the network / area point of contact o Introduce referencing system for projects to make communication easier o Make online forms easier to complete o Improve staff knowledge • Improved trust in our transparency P.13. • Steady increase in stakeholders paying for services over last three years P.14. • A significant increase in perception that paid for services are value for money compared to 2015 and 2014. P.15.

Performance measure	Sv3 Customer Trust	
Research	**Date**	**Customer feedback**
Resilience (DJS)	Oct-16	• When first asked, Welsh Water was seen to be a highly trustworthy organisation across both domestic and business participants with the majority of participants

		scoring them 8-10 out of 10. Despite this initial view, there were three key issues that when probed on led people to question this "trustworthy" image, lack of choice, unaware of not-for-profit and poor service experience. P.8.
Customer Priorities (Blue Marble)	Oct-16	• Customers find it hard to assess whether WW is trustworthy; and some factors can undermine trust: o Can't choose/switch – and can't compare with other WaSCs o Bills differ between neighbours (often inexplicably) o Some on meters, some not o Know little about it as an organisation (it's values, activities); few know about not for profit status. P.11. • NHH base trusted supplies/brands by providing good capabilities (core service, responsive and communication), put customers interests at heart (values/ethics and partnership based) and believe it will deliver on promises. Account managed put more emphasis on the relationship. P.21. • High levels of trust with stakeholders. Importance of not for profit status in overall perceptions and belief that this enables them to have and meet socially/environmentally responsible goals. P.33.

Performance measure	Sv4 Business customer satisfaction	
Research	**Date**	**Customer feedback**
NHH survey Wave 2 (Accent)	Feb 2018	• High Satisfaction: The customers who rated their satisfaction with Welsh Water gave a very high score of 4.37 out of 5. 87.63% were satisfied and 5.48% were dissatisfied. By far the main reason for being satisfied was having no issues or minimal problems (73%). P.3. • Meter telemetry, online bill viewing and payment, water efficiency audits and water efficiency products were all seen as important to customers. P.3. • 23% were aware that non-household water customers supplied by English water companies can now switch suppliers. Over a quarter (24%), would like the opportunity to do so themselves. The key driver was cost much more than service (eg 62% would switch to reduce cost). P.3. • The key driver among those who would not switch is service rather than cost. 56% thought service was good or were generally happy with Welsh Water P.3.

Performance measure	Sv5 Vulnerable customers on priority services register	
Research	**Date**	**Customer feedback**
Customer Priorities (Blue Marble)	Oct-16	• Emphasis on customer care esp. for vulnerable. P.13.
Performance targets qualitative (Accent)	Jun-17	• Strong social conscience across groups esp. supporting older people (might leave the tap running and run up a big bill, etc) P.21. • Bills and detail of tariffs can be confusing for vulnerable customers P.21. • Some concerns that the existing schemes are open to abuse P.21. • AND criteria might not be quite right e.g. just because you have 3 children and are on benefits doesn't mean you need support P.21. • schemes are just not visible enough; Need better marketing and access to online calculators to check eligibility P.21. • WTP is high P.21. • Encouraged to see the type of schemes Welsh Water have in place although potential to confuse P.21. • Feel that Welsh Water need to proactively put customers on these schemes P.21. • 33p feels very little and some groups (pre-kids, Colwyn Bay) looking for this to be increased further P.21.
Resilience (DJS)	Oct-16	Uninformed view: • Across participants there was a feeling that a short half day interruption wouldn't prove too problematic and is something they would "just get on with it". Around 1-5 half day interruptions per year would be seen as acceptable as long as planned. P.14. • This was particularly prominent amongst domestic customers who think that they would just find a way to cope with this level of interruption. However, special provisions for vulnerable groups should be made. P.14.
Deep Dive: Worst served (Blue Marble)	March-17	• All agreed vulnerable customer should be prioritised o High proportion of customer who took part who could be categorised as vulnerable but they either weren't registered with our services or didn't feel they got any benefit from being on our services. P.30.
Customer Service Expectations (Blue Marble)	March-17	• Expect that welsh water take responsibility to ask customers if they require special assistance P.28.

		• Low awareness of services available for those struggling to pay or who need special assistance P.36.
Vulnerable Customers (Blue Marble)	Jan-18	• Vulnerability is often underpinned by affordability issues P.12. • Level of risk is complex but reliance on 3rd parties influences circumstances. P.13. • Stakeholder organisations are looking to companies like Welsh Water for support which they can pass on P.17. • Those in the sample who had contact with 3rd party stakeholders were all known to welsh water and receiving support P.19. • Those customers who were more self-reliant were missing out on potential help – Overall there is low awareness of financial help and support available: the onus is currently on the customer seeking out help or waiting for intervention due to debt problems. P.19. • Majority of customer eligible for financial help found contacting orgianisations a challenge. This is due to a number of issues such as anxiety, the issues are too complex and they find it confusing, cost of phoning is too much, barrier using online services etc. P.27. • F2F and phone channels preferred or help from a third party organization. P.27. • There is an opportunity to use community hubs and community mavens as a communication channel P.48.

Performance measure	Sv6 Customers on Welsh Language register	
Research	**Date**	**Customer feedback**
Customer Service Expectations (Blue Marble)	March-17	P.30. Expectations generally • All public sector organisations in Wales expected to operate as bilingual • Welsh companies with Welsh market expected to offer Welsh • Increasingly other businesses have some bilingual elements e.g. • Cash point machines • Supermarket signage • Non Welsh private sector organisations not expected to operate as bilingual Wide spectrum of views about Welsh language: OBLIGATION: it is the law/Welsh language Act CULTURAL BENEFIT: important part of Welsh identity NECESSITY: for non-English speakers DIVISIVE: for the generation of Welsh people who don't speak Welsh INAPPROPRIATE: even for first language Welsh speakers not suitable for dealing with companies WASTEFUL: bilingual for everything is wasting money

		SERVICE BENEFIT: quicker to get through on the Welsh language line • Bilingual bills, call centres etc more often seen as part of the new cultural norm, not as a service benefit • Welsh speakers elsewhere choose to use the English options P.31. Expectations for Welsh Water: • Phone/verbal communications • Greetings on phone to include Welsh • Expect to be passed to a Welsh speaker if requested; or to have separate Welsh number P.31. Written communications: • Customers opt in to Welsh language for e.g. bills • Thereafter receive either Welsh or English, as preferred • (Fully bilingual written communications seen as wasteful across the board)

Putting things right if they go wrong

Performance measure	Rt1 Sewer Flooding on customer property (Internal)	
Research	**Date**	**Customer feedback**
Resilience (DJS)	Oct-16	• Low tolerance due to health hazards and impact especially on businesses P.36. • Expectations that we make contingency plans for this event, provide accommodation, be out quickly, take charge of cleanup effort, offer compensation and multiple modes of communication. P.38.
WTP Qualitative research (Accent)	Aug-16	• Seen as a high priority- emotional response P.24.
Performance targets qualitative (Accent)	Jun-17	• Critical importance - this feels like one of the worst things to happen to anyone. P.17. • Key for DCWW to replace old sewage infrastructure/drains P.17. • Felt also to be a customer responsibility also and we need to educate customers more P.17. • WTP is high P.17. • £0.45 increase in the bill feels very small compared to the negative emotional and practical impact of sewage in the home P.17. • 19% voted to keep investment as now p.16 • 21% voted for £0.25 increase in annual bill (200 properties flooded a year) p.16 • 61% voted for £0.45 increase in annual bill (180 properties flooded a year) p.16

Performance measure	Rt2 Sewer flooding on customer property (external)	
Research	**Date**	**Customer feedback**
WTP Qualitative research (Accent)	Aug-16	• Seen as a high priority- emotional response P.24.
Performance targets qualitative (Accent)	Jun-17	• Important area but not as bad as sewage in the home Considered to have emotional, practical and health implications P.55.

		• Combination of education, network investment and working with local authorities/construction companies to reintroduce soakaways P.55. • As with sewage in the home, more pressure on manufacturers to be responsible P.55. • Introduce statutory stickers/regulation on public conveniences e.g. pubs, restaurants, parks P.55. • WTP = low P.55. • Looks like DCWW are making small improvements already P.55. • Although £1.00 is small amount, it doesn't feel like it makes a big enough impact on the number of properties affected (only 200) P.55. • More about encouraging behavioural change than spending money if 30% of the blockages are on customers private pipes P.55. • 63% voted to keep investment as now (6,500 properties/areas affected) p.54 • 29% voted for £1.00 increase to annual bill (6,300 properties/areas affected) p.54 • 8% voted for £2.00 increase to annual bill (6,100 properties/areas affected) p.54

Performance measure	Rt3 Sewer collapses	
Research	**Date**	**Customer feedback**
Performance targets qualitative (Accent)	Jun-17	• Important area as this is Welsh Water's core estate and operational equipment P.80. • Recognise that dealing with very old infrastructure and pipework AND in a much more volatile climate P.80. • Balance needed between new builds and repairs of existing assets P.80. • Advantage of new builds is innovative materials that are more environmentally friendly and sustainable e.g. new pipe work might be more resistant to freezing weather P.80. • BUT essential work needs to be done on ongoing repairs (in partnership with local authorities to minimise disruption) P.80. • Important and want to see Welsh Water investigating more innovative and future proof materials P.80. • Sewer flooding of greater importance than mains bursts P.80. • Sewer flooding = health implication P.80.

		• Sewer flooding = getting worse so looks like an urgent issue P.80.

Performance measure	Rt5 Worst served customers water services	
Research	**Date**	**Customer feedback**

Deep Dive: Worst served (Blue Marble)	March-17	• Disconnect in perceptions of 'on the ground' vs 'HQ' P.21.
		• Interruption to supply impact depends on length of time 6hrs is inconvenient but 6 hrs plus has higher impact. DCWW not always held responsible-out of our control. P.14.
		• Water discolouration only seen as a minor impact but little understanding of if it's safe to drink. P.16.
		• Low pressure seen as lowest impacting service failure-inconvenient but able to work around it. Don't necessarily blame DCWW. P.16.
		• Could be under reporting numbers of worst served by Qual anecdotal evidence that customers do not report every problem and are aware than other don't report problems at all P.22.
		   o Assume dcww already know
		   o Fed up of complaining/lack of belief anything with change
		• Customer expect acknowledgement of the inconvenience and expect apologies and compensation P.28.
		• All agreed vulnerable customer should be prioritised P.30.
		   o High proportion of customer who took part who could be categorised as vulnerable but they either weren't registered with our services or didn't feel they got any benefit from being on our services.
		• Good communication helped overcome frustrations P.34.
		• Customers become resigned to the levels of service. Despite ongoing problems majority of customers were not angry with dcww. This is largely influenced by two factors the customer characteristics of ability to cope and the nature of the problem (not our fault or low impact). P.20.

Water2050 Qualitative (Blue Marble)	July-2017	• Relatively less important than other 14 strategic responses P.16. • Driven by the very small number of households P.25. • Response relates to personal values and whether identify with worst served or everybody else paying more to improve for all P.25. • while some support the principle that all should receive the same level of service many others believe DCWW should

		manage the 425 while investing in bigger/more universal risks P.25. • Also perceive new householders will have to accept a known situation P.25.
Performance targets qualitative (Accent)	Jun-17	• Generally seen to be a concern if you are one of the minority affected by persistent service failures P.61. • However, no-one considered themselves to be 'worst served' P.61. • Interruptions/Pressure = inconvenient vs. life changing or particularly challenging P.61. o Only 35 properties affected (pressure) • WTP for Pressure and Interruptions = overall low P.61. • Improvements made year on year P.61. • Greater WTP for sewer flooding driven by more significant impact on lifestyle AND concerns over rising external sewer figures P.61. • Numbers do feel high though - £6.48 per year, per household to help 648 properties P.61. • 57% voted to keep investment as now (35 properties affected by persistent low water pressure due to low pressure in welsh water's pipes) p.58 • 9% voted for £0.25 increase to annual bill (10 properties affected by persistent low water pressure due to low pressure in welsh water's pipes) p.58 • 8% voted for £0.35 increase to annual bill (No properties affected by persistent low water pressure due to low pressure in welsh water's pipes) p.58 • 79% voted to keep investment as now (1400 properties affected by interruptions of over three hours to their supply at least 3 times a year) p.59 • 18% voted for £4.00 increase to annual bill (1000 properties affected by interruptions of over three hours to their supply at least 3 times a year) p.59 • 3% voted for £6.00 increase to annual bill (800 properties affected by interruptions of over three hours to their supply at least 3 times a year) p.59

Performance measure	Rt6 Worst served customers waste services	
Research	**Date**	**Customer feedback**

Deep Dive: Worst served (Blue Marble)	March-17	• Disconnect in perceptions of 'on the ground' vs 'HQ' P.21.
		• Sewage flooding ranked having the greatest impact on customers
		  o Most disruptive and it's out of their control P.10.
		• Sewage odour again very impactful but has varying degrees of impact on customers. Again has a lack of control associated with it. P.12.
		• Could be under reporting numbers of worst served by Qual anecdotal evidence that customers do not report every problem and are aware than other don't report problems at all. P.22.
		  o Assume dcww already know
		  o Fed up of complaining/lack of belief anything with change
		• Customer expect acknowledgement of the inconvenience and expect apologies and compensation P.28.
		• All agreed vulnerable customer should be prioritised P.30.
		  o High proportion of customer who took part who could be categorised as vulnerable but they either weren't registered with our services or didn't feel they got any benefit from being on our services.
		• Good communication helped overcome frustrations P.34.
		• Customers become resigned to the levels of service. Despite ongoing problems majority of customers were not angry with dcww. This is largely influenced by two factors the customer characteristics of ability to cope and the nature of the problem (not our fault or low impact). P.20.

Water2050 Qualitative (Blue Marble)	July-2017	• Relatively less important than other 14 strategic responses P.16. • Seen as a minority issue P.25.
Performance targets qualitative (Accent)	Jun-17	• Generally seen to be a concern if you are one of the minority affected by persistent service failures P.61. • However, no-one considered themselves to be 'worst served' P.61. • Sewer flooding – response similar to sewer in home P.61. • Improvements made year on year P.61. • Greater WTP for sewer flooding driven by more significant impact on lifestyle AND concerns over rising external sewer figures – why? P.61. • Numbers do feel high though - £6.48 per year, per household to help 648 properties P.61. • 48% voted to keep investment as now (1648 properties affected by sewer flooding) p.60

		• 37% voted for £3.98 increase to annual bill (1250 properties affected by sewer flooding) p.60 • 15% voted for £6.48 increase to annual bill (1000 properties affected by sewer flooding) p.60

Fair bills for everyone

Performance measure	Bl2 Vulnerable customers on social tariffs	
Research	**Date**	**Customer feedback**
Customer Priorities (Blue Marble)	Oct-16	• Majority of customer said they would support the majority of customers paying a little more to reduce bills for others (48). P.15. • Sizeable minority also voted for everyone should pay the same (35). P.15. • Stakeholders gave universal support for social tariffs. P.35.
Customer Service Expectations (Blue Marble)	March-17	• Expect that welsh water take responsibility to ask customers if they require special assistance P.28. • Low awareness of services available for those struggling to pay P.36. • Economically vulnerable particularly cynical about why bills differ for different household with no clear reason why P.36.
Deep Dive: Worst served (Blue Marble)	March-17	• Low awareness of services available for those struggling to pay P.30 • Some examples of findings HelpU application a barrier P.30.
Bills (Blue Marble)	Sept-17	• 35% think their household will be worse off in the next 12 months (vs. only 7% who think they will be 'better off') And it's those who are already in poorer economic situations who are the least positive P.9. • 5% of Welsh Water customers say they cannot afford their water bill, although nearly 4 in 10 more say they find that affording their water bill is 'a stretch'. P.11. • Affordability is strongly related to economic circumstance: Those who are struggling to afford their water bill are more likely to be from lower social classes with lower income. They're also less likely to be on a meter, more likely to live on their own, and more likely to say they're paying more for their bill. Those who live alone, and those who claim they pay over £600 per annum are also more likely to say their water bill is 'a stretch' or unaffordable P.13. • Key reasons for not being able to afford the water bill tend to be to do with external factors rather than perceptions that the bill has gone up; the top stated reason is recent economic vulnerability. P.16. • The idea of the social tariff is quite divisive - 38% of respondents initially find the principle acceptable, while 40% find it unacceptable, with the remaining 12% unsure. After a fuller explanation of Welsh Water's plans, there's a slight shift to the positive, but little overall change – customer's views remain entrenched. P.53.

		• Amongst those who find the principle of a social tariff acceptable, the vast majority (84%) would find £10 a year an acceptable amount to pay on their bill. P.56.
Have your say (Blue Marble)	Sept-17	• 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.P.25.
Performance targets qualitative (Accent)	Jun-17	• Strong social conscience across groups esp. supporting older people (might leave the tap running and run up a big bill, etc) P.21. • Bills and detail of tariffs can be confusing for vulnerable customers P.21. • Some concerns that the existing schemes are open to abuse P.21. • AND criteria might not be quite right e.g. just because you have 3 children and are on benefits doesn't mean you need support P.21. • schemes are just not visible enough; Need better marketing and access to online calculators to check eligibility P.21. • WTP is high P.21. • Encouraged to see the type of schemes Welsh Water have in place although potential to confuse P.21. • Feel that Welsh Water need to proactively put customers on these schemes P.21. • 2019 predictions of 100k customers is high and suggests immediate action needed P.21. • 18% voted to keep investment as now p.20 • 21% voted for £0.16 increase to annual bill (150,000 customer son social tariffs) p.20 • 61% voted for £0.33 increase in annual bill (200,000 customers on social tariffs) p.20
Vulnerable Customers (Blue Marble)	Jan-18	• Vulnerability is often underpinned by affordability issues P.12. • Level of risk is complex but reliance on 3rd parties influences circumstances. P.13. • Stakeholder organisations are looking to companies like Welsh Water for support which they can pass on P.17. • Those in the sample who had contact with 3rd party stakeholders were all known to welsh water and receiving support P.19. • Those customers who were more self-reliant were missing out on potential help – Overall there is low awareness of financial help and support available: the onus is currently on the customer seeking out help or waiting for intervention due to debt problems. P.19.

		• Majority of customer eligible for financial help found contacting orgianisations a challenge. This is due to a number of issues such as anxiety, the issues are too complex and they find it confusing, cost of phoning is too much, barrier using online services etc. P.27. • F2F and phone channels preferred or help from a third party organization. P.27. • There is an opportunity to use community hubs and community mavens as a communication channel P.48.

Social Tariff (Accent)	Mar-2018	• There are mixed levels of support for a social tariff that relies on a cross subsidy between different subsets of customers P.34.
		• The motivation for supporting the social tariff principle is personal or social P.16.
		    o Personal = own/friends/family experiences – crucially they understand and can imagine water poverty
		    o Social = commitment to equal society – importantly these individuals are also prepared to contribute to the system they believe in
		• The reason for opposing the social tariff principle is multi layered but sits within the personal/social spectrum P.16
		    o Personal = resent helping others or financial cannot commit to doing so
		    o Social = frustration that this needs to be a customer commitment vs. government/charity/company responsibility
		• Once customers understand the scheme parameters and financial contribution, there is generally good support. P.18.
		• Uninformed acceptability to the social tariff is high:
		    o Customers support the principle P.18.
		    o Important for DCWW to match fund and that customers accept water efficiency advice P.20.
		    o DCWW's NFP status is important in framing customer response to the tariff P.34.
		• Uninformed support sufficient for an additional £6 per year P.27.
		• Regardless of whether customers support or oppose the social tariff principle, there was significant discomfort during qualitative discussions that the cross subsidy already exists. P.31.
		• And this is replicated in the quantitative research where support fell P.32..:
		    o £0.25pm/£3pa – 75% to 61%
		    o £0.50pm/£6pa – 70% to 52%

Performance measure	B13 Company level of Bad Debt	
Research	**Date**	**Customer feedback**

Customer Priorities (Blue Marble)	Oct-16	• Stakeholders identified deb management as an area for improvement P.34.
		  o Use of County Court Judgements
		  o Increased tailoring and flexibility in approach to vulnerable customers
		  o Improved staff training, better communications

Performance targets qualitative (Accent)	Jun-17	• Collecting bills is fundamental part of the business P.70.
		• Need to separate can't pay from won't pay P.70.
		• Schemes in place for can't pay so need to be assertive P.70.
		• More encouragement to start with – carrot vs. stick P.70.
		• Then important stringent in recovery – and would like to see this speeded up P.70.
		• Reassured by the debt collection process P.70.
		• Concerns about the cost of recovering debt – important to contextualise that WW won't spend more recovering the debt than the debt is worth P.70.
		• Content that Welsh Water will only chase debts where it makes financial sense P.70.
		• Very important for majority P.70.
		  o Efficiency of the business
		  o Fairness for all
		• Some feel less important P.70.
		  o Comparative data shows that Welsh Water are doing well compared to other companies
		• 64% voted this investment as very important p.69
		• 26% voted this investment as important p.69
		• 5% voted this investment as neither important or unimportant p.69
		• 2% voted this investment as unimportant p.69
		• 3% voted this investment as very unimportant p.69

Creating a better future for all our communities

Performance measure	Ft1 Risk of severe restrictions in a drought	
Research	**Date**	**Customer feedback**
Resilience (DJS)	Oct-16	• Participants understood the terms and whilst they weren't able to expand on them in great depth there was an understanding of what they mean. P.10. • When asked what words, thoughts or feelings spring to mind when they hear the phrase "home water supply" participants were quick to make clear that a clean, safe and continuous supply was top of mind. There was a strong realisation however that their water supply is all too often taken for granted and its presence simply presumed. P.12. • Top of mind threats to water supply: Terrorism, old/burst pipes, contamination, growing population, drought and frozen pipes. P.13. • Business and domestic customers would be a lot more understanding of an extreme event caused by an Act of God than the negligence of Welsh Water P.26. • There was also a consensus that Welsh Water is not the only organisation that should be investing in this area P.55.
Customer Priorities (Blue Marble)	Oct-16	• Customer prioritised ensuring reliability of supply into the future and preventing water contamination. P.13. • Some customers willing to protect for future generations and many are eager that Welsh Water is thinking and planning ahead, but not paying in advance. P.14.
WRMP Qualitative (Accent)	Jan-17	• No appetite for to support any changes to WW plans for hospipe bans (1 in 20 years is fine) p.20. • Desire for WW to plan for resilience BUT not overly concerned about the type of suggested restrictions p.19. • Short term bans on 'non-essential' water usage is acceptable p.19 • Resilience Options: Sharing and trading. Water sharing initiatives (across Wales) are very well supported. Idea of raising revenue by selling WW to water stretched areas in England is well supported, providing this is at low environmental cost. P.40 & 41 • Resilience Options: Water saving measures. Customers want WW to educate through advice *and* devices to save water P.44.
Bills (Blue Marble)	Sept-17	• Overall there's a fairly even split between how many customers would want to invest extra now, versus those who would rather leave future generations to worry about future challenges.

		However, those advocating making more up-front investment are more committed to the idea. P.46.
Have your say (Blue Marble)	Sept-17	• 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. P.22.
Water2050 Qualitative (Blue Marble)	July-2017	• Support for preventing pollution at source: better for nature and wildlife; natural solutions more sustainable than hi-tech ones P.17. • Future of natural environment vital to quality of life (and life itself) P.17. • Many uncomfortable with (more) chemical treatments P.17. • Likely to be cost effective in long term P.17.

Performance measure	Ft2 Risk of sewer flooding in a severe storm	
Research	**Date**	**Customer feedback**
Resilience (DJS)	Oct-16	• Uninformed view of resilience: Participants understood the terms and whilst they weren't able to expand on them in great depth there was an understanding of what they mean. P.10. • Top of mind threats: Growing population, burst pipes, blockages, flooding and high tides. P.13. • A consensus that it shouldn't happen in the first place - Welsh Water should be focusing on preventing this. P.20. • Business and domestic customers would be a lot more understanding of an extreme event caused by an Act of God than the negligence of Welsh Water. P.26. • Low tolerance due to health hazards and impact especially on businesses. P.36. • Amongst domestic customers, views varied however there was a general consensus that between a "once a generation" extreme flood to once in 200 years is what should be planned for. P.51. • Amongst business customers, there was a greater tendency to feel that planning for a shorter time span would be important with some saying it could happen at any time. P.51. • There was an expectation that if bills increased in order to invest in measures to prevent extreme events, that once the investments had been made, bills would go down again. P.54. • There was also a consensus that Welsh Water is not the only organisation that should be investing in this area.P.55.

Customer Priorities (Blue Marble)	Oct-16	• Some customers willing to protect for future generations and many are eager that Welsh Water is thinking and planning ahead, but not paying in advance. P.14.
WRMP Qualitative (Accent)	Jan-17	• Resilience Options: Wastewater recycling. Customers like the idea of recycling wastewater as part of resilience plan but imagine this is done already P.37.
Bills (Blue Marble)	Sept-17	• Overall there's a fairly even split between how many customers would want to invest extra now, versus those who would rather leave future generations to worry about future challenges. However, those advocating making more up-front investment are more committed to the idea.P.46.
Performance targets qualitative (Accent)	Jun-17	• 29% voted to keep investment as now (25,000 Rainscape scheme) p.41 • 56% voted for £3.03 increase to annual bill (40,000 Rainscape scheme) p.41 • 14% voted for £7.06 increase in annual bill (60,000 Rainscape scheme) p.41 • Not stated 1%

Performance measure	Ft3 Energy Self-Sufficiency	
Research	**Date**	**Customer feedback**
Customer Priorities (Blue Marble)	Oct-16	• Customer prioritised finding efficiency measures such as generating our own energy. P.13. • Stakeholders identified reduction of CO2 and reduction of pumping costs as an area of improvement. P.34.
Environment (DJS)	March-17	• Seen as a very important area to consider investing in both now and in the future. P.23. • Both domestic and business customers are aware of the benefit to them if Welsh Water generates its own energy. P.24.
Performance targets qualitative (Accent)	Jun-17	• Important to be future focused P.38. • Sensible to use Wales' rich natural resources P.38. • Investment to reduce fossil fuel dependency seen to be good for Welsh Water brand P.38. • Regeneration schemes are worth investment as they do so much more than produce energy P.38. o Great for communities o Generate jobs o Educate customers • Would like to see Welsh Water supporting community/household schemes P.38.

		• Eventually want to see some savings passed on to consumers P.38.
		• High for most (Pre-Kids, Colwyn Bay) P.38.
		• Supporting information shows excellent recent performance P.38.
		    o Encouraged by innovation (video)
		• Good to see that Welsh Water are better than average P.38.
		    o More of the same please
		• Some reluctance to pay for further improvements P.38.
		    o Doing enough already
		    o Better than average
		    o Global vs. local problem
		• 29% voted to keep investment as now (30% of WW total energy use from renewable energy) p.37
		• 34% voted for £1.25 increase to annual bill (35% of WW total energy use from renewable energy) p.37
		• 35% voted for £2.50 increase in annual bill (40% of WW total energy use from renewable energy) p.37

Performance measure	Ft4 Surface water removed from sewers	
Research	**Date**	**Customer feedback**
Resilience (DJS)	Oct-16	• Seen as environmentally friendly, a good long term measure. P.45.
Environment (DJS)	March-17	• Surface water management seen as a 'hot topic' given all the flash floods of recent years. P.25. • Tackling surface water management should be a shared responsibility between Welsh Water and councils P.26. • Views towards rainscape: Thought it would work in some places but not so well in others (e.g. not in Monmouth where the water table is said to already be high) P.28. • Appears to be a simple solution but may struggle to implement in areas where land ownership is an issue P.28. • Overall awareness of rainscape was low P.29.
Have your say (Blue Marble)	Sept-17	• 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 ager groups. Those completing on paper are also notably higher. P.21.
Water2050 Qualitative (Blue Marble)	July-2017	• Polarised views across and within the group discussions P.16. • RainScaping initiatives highly appealing to some (simple, preventative, attractive) but not always seen to be as important P.16.

		• Lower social groups more likely to prioritise both lead-free Wales and RainScaping P.16. & P27. • Seems intuitively right to work with nature P.27. • Societal benefits: aesthetic as well as reducing rain water loss and flood risk P.27.

Performance targets qualitative (Accent)	Jun-17	• Flooding risk is recognised as an area of concern P.42.
		• Climate change and excessive water feeding the drains seen to elevate the risk P.42.
		• Environmental and community benefits of rainscape schemes feel really worthwhile P.42.
		• Encouraged by innovation and feel like Welsh Water are taking a long term view P.42.
		• Feel that Welsh Water should be working with households and communities to advise/educate about simple and more complex systems P.42.
		    o Water butts
		    o Impact of paving drives, etc
		    o Community underground storage tanks
		• Some appetite for improvements P.42.
		• Historical performance shows that at current bill levels Welsh Water are investing and improving P.42.
		• £7.06 feels a considerable increase on the bill for a long term benefit P.42.
		    o Just too high for many
		• £3.03 acceptable for many who feel this cannot be ignored without storing up significant future flood risks P.42.
		• 29% voted to keep investment as now (25,000 Rainscape scheme) p.41
		• 56% voted for £3.03 increase to annual bill (40,000 Rainscape scheme) p.41
		• 14% voted for £7.06 increase in annual bill (60,000 Rainscape scheme) p.41
		• Not stated 1%

Performance measure	Ft5 Asset Resilience: Reservoirs	
Research	**Date**	**Customer feedback**
WRMP Qualitative (Accent)	Jan-17	• Customers want to know that Welsh Water are forward planning for new developments P.15. • Desire for WW to plan for resilience BUT not overly concerned about the type of suggested restrictions P.19. • Resilience Options: Sharing and trading. Water sharing initiatives (across Wales) are very well supported. Idea of raising revenue by selling WW to water stretched areas in England is

		well supported, providing this is at low environmental cost. P.40 & 41 • Infrastructure initiatives like new reservoirs seen as big capex and significant environmental ramifications p.34 • Increase capacity of reservoirs however seen as more logical logical, lower cost than reopening/building new and least impact on the environment as structures are already in place p.34.

Performance measure	Ft6 Asset Resilience: water network + above ground	
Research	**Date**	**Customer feedback**
Performance targets qualitative (Accent)	Jun-17	• **Overall response** • Critical as a business to protect assets P.66. • Important to be aware and prepare for risks P.66. • Climate change is a recognised concern and recent flood coverage in national media makes this real P.66. • Looking for Welsh Water to consider more innovative ways of protecting assets e.g. resilient materials P.66. • **Importance** • Very/Quite = majority P.66. • Minority who think Welsh Water should not be too future focused P.66. o Planning for things that don't happen costs money o Some of these feel like low probability events o Need to ensure current issues are prioritised e.g. delivery of basics • 25% voted this investment as very important p.65 • 62% voted this investment as important p.65 • 7% voted this investment as neither important or unimportant p.65 • 1% voted this investment as unimportant p.65 • 4% voted this investment as very unimportant p.65 • 1% not stated p.65
Water2050 Qualitative (Blue Marble)	July-17	Protecting critical supply assets ranked consistently high important strategy P.15.: • Fundamental to business operation • Problems would have major impact on customers • Core to future resilience

Performance measure	Ft7 Asset Resilience: water network + below	
Research	**Date**	**Customer feedback**
Performance targets qualitative (Accent)	Jun-17	• **Overall response** • Critical as a business to protect assets P.66. • Important to be aware and prepare for risks P.66. • Climate change is a recognised concern and recent flood coverage in national media makes this real P.66. • Looking for Welsh Water to consider more innovative ways of protecting assets e.g. resilient materials P.66. • **Importance** • Very/Quite = majority P.66. • Minority who think Welsh Water should not be too future focused P.66. o Planning for things that don't happen costs money o Some of these feel like low probability events o Need to ensure current issues are prioritised e.g. delivery of basics • 57% voted mains bursts as very important p.79 • 40% voted mains bursts as important p.79 • 3% voted mains bursts as neither unimportant or important p.79
Water2050 Qualitative (Blue Marble)	July-17	Protecting critical supply assets ranked consistently high important strategy P.15: • Fundamental to business operation • Problems would have major impact on customers • Core to future resilience

Performance measure	Ft8 Asset Resilience: waste network + above ground	
Research	**Date**	**Customer feedback**
Performance targets qualitative (Accent)	Jun-17	• **Overall response** • Critical as a business to protect assets P.66. • Important to be aware and prepare for risks P.66. • Climate change is a recognised concern and recent flood coverage in national media makes this real P.66. • Looking for Welsh Water to consider more innovative ways of protecting assets e.g. resilient materials P.66. • **Importance** • Very/Quite = majority P.66. • Minority who think Welsh Water should not be too future focused P.66. o Planning for things that don't happen costs money

		 o Some of these feel like low probability events o Need to ensure current issues are prioritised e.g. delivery of basics
Water2050 Qualitative (Blue Marble)	July-17	Protecting critical waste assets ranked consistently high important strategy P.15.: • Fundamental to business operation • Problems would have major impact on customers • Core to future resilience

Performance measure	Ft9 Asset Resilience: waste network + below ground	
Research	**Date**	**Customer feedback**
Performance targets qualitative (Accent)	Jun-17	• **Overall response** • Critical as a business to protect assets P.66. • Important to be aware and prepare for risks P.66. • Climate change is a recognised concern and recent flood coverage in national media makes this real P.66. • Looking for Welsh Water to consider more innovative ways of protecting assets e.g. resilient materials P.66. • **Importance** • Very/Quite = majority P.66. • Minority who think Welsh Water should not be too future focused P.66. o Planning for things that don't happen costs money o Some of these feel like low probability events o Need to ensure current issues are prioritised e.g. delivery of basics • 84% voted damage to sewers as very important p.77 • 13% voted damage to sewers as important p.77 • 10% voted damage to sewers as neither important or unimportant p.77 • 2% voted damage to sewers as unimportant p.77 • 1% voted damage to sewers as very unimportant p.77
Water2050 Qualitative (Blue Marble)	July-17	Protecting critical waste assets ranked consistently high important strategy P.15.: • Fundamental to business operation • Problems would have major impact on customers • Core to future resilience

Performance measure	Ct10 Community Education	
Research	**Date**	**Customer feedback**
Customer Priorities (Blue Marble)	Oct-16	• Customers want to be educated about how water companies work and how they can reduce their bills. P.13. • A central theme across the research piece was improving and providing continuous education to customers. Customers requested additional education on what DCWW do, further explanation of bills and further education on water conservation with a view to reducing their bills. P.13.
Return of Value (Fresh Minds)	Jun-2016	• Investment in education projects is favourably received, particularly in relation to improving efficiency and conservation through education with a view to reducing costs P.57 • Information and education can improve reported favour toward long-term benefit P.57.
Performance Measures (Accent)	Oct-16	• Customers identified security of supply, social responsibility in relation to vulnerable customers, modern service and innovation and education as missing from the performance measures. P.14.
WTP Qualitative research (Accent)	Aug-16	• The majority of customers wanted to introduce initiatives to avoid waste/reduce leakage, incentives for rain water harvesting and further education and information. P.8 & 9.
WRMP Qualitative (Accent)	Jan-17	• Education/advice supported by actionable devices are high priority (seen as relatively low cost with positive environmental impact) P.48.
Performance targets qualitative (Accent)	Jun-17	• Real sense that need to engage with the next generation of water users e.g. Water cycle/history of water plants • Education content shows so many interesting things regarding school children • 54% voted recreational and educational facilities as very important p.73 • 33% voted recreational and educational facilities as investment as important p.73 • 10% voted recreational and educational facilities as investment as neither important or unimportant p.73 • 1% voted recreational and educational facilities as investment as unimportant p.73 • 2% voted recreational and educational facilities as investment as very unimportant p.73 • 1% not stated p.73

Performance measure	Ft11 Visitors to recreational facilities	
Research	**Date**	**Customer feedback**
Performance Measures (Accent)	Oct-16	• Visitor centre numbers were deemed to be of high relevance and demonstrates commitment to education and the Welsh community, focus on children's education deemed important. P.36.
Performance targets qualitative (Accent)	Jun-17	• Measuring recreational by number of visitors is key o Many unaware of these facilities – although they do talk about children/grandchildren going on school trips 'somewhere' o Satisfaction could be high but of very small base • Potential to monitor visitor numbers and experience via an app • Some feel that more could be done with Visitor Centres as tourist attractions e.g. decent cafes, etc • 54% voted recreational and educational facilities as very important p.73 • 33% voted recreational and educational facilities as investment as important p.73 • 10% voted recreational and educational facilities as investment as neither important or unimportant p.73 • 1% voted recreational and educational facilities as investment as unimportant p.73 • 2% voted recreational and educational facilities as investment as very unimportant p.73 • 1% not stated p.73

Colleague Promises

Performance measure	Co2 Employee training and expertise	
Research	**Date**	**Customer feedback**
Water2050 Qualitative (Blue Marble)	July-2017	• Seen as relatively less important than other 14 strategic responses. P.16. • For most, employer role is an internal rather than customer-facing strategies (more how you do it than what you do) P.16. • Some (notably ABs and younger) felt employer of choice was much more important and signified investing in the future P.16.