

PR19 Acceptability

Final phase of research: Full report
9th July 2018



- 1 Objectives and method
- 2 The customer view going into PR19
- 3 Overall response to the Business Plan
- 4 Evaluating the Business Plan in detail
- 5 Response to Rewards and Penalties (ODIs)
- 6 Accessibility and Assistance
- 7 Summary and conclusions

To measure and understand the acceptability of Welsh Water's final draft business plan for 2020-25 for household and non-household customers

Robustly measure response to the final draft business plan

- Uninformed and informed acceptability
- Affordability of the proposed bill
- Perceived value for money

Explore and understand acceptability and affordability

- Identify if there are certain customer groups who find the plan more or less acceptable or affordable
- Understand why, exploring in detail the different elements of the plan

Explore response to rewards and penalties (ODIs)

- Understand the customer response to the concept of ODIs and their view of the possible bill impact range

Qualitative

Fieldwork took place across Welsh Water region
Hereford, Rhyl, Cardiff, Pembroke, Swansea,
Aberystwyth

Dates: 24th May – 5th July 2018

Household customer groups

2 x Future Customers
2 x Vulnerable audience customers
6 x customer groups
4 x depths with Worst Served

Non household customers

2 groups – SMEs
4 depths – Large Users

Stakeholders

4 depths with organisations representing 'seldom heard' customers

Quantitative

Total of **979** x 15 minute on-screen interviews carried out via three surveys in June 2018. The core questionnaire was common to all three surveys, with questions and stimulus tailored to household and non-household audiences

600 Household customers. Randomly recruited from online panel, with quotas on age, gender, social grade and region applied. Weighted to ensure representative cross section (2011 Census)

209 'Seldom heard' household customers. A central location survey on iPads in 6 locations across the Welsh Water catchment. All respondents with at least one indicator of vulnerability or are not online

170 Non-household customers. Randomly recruited from online panel. Weighted to ensure equal representation of micro (0-9 employees), small (10-49 employees) and medium-large (50+ employees)

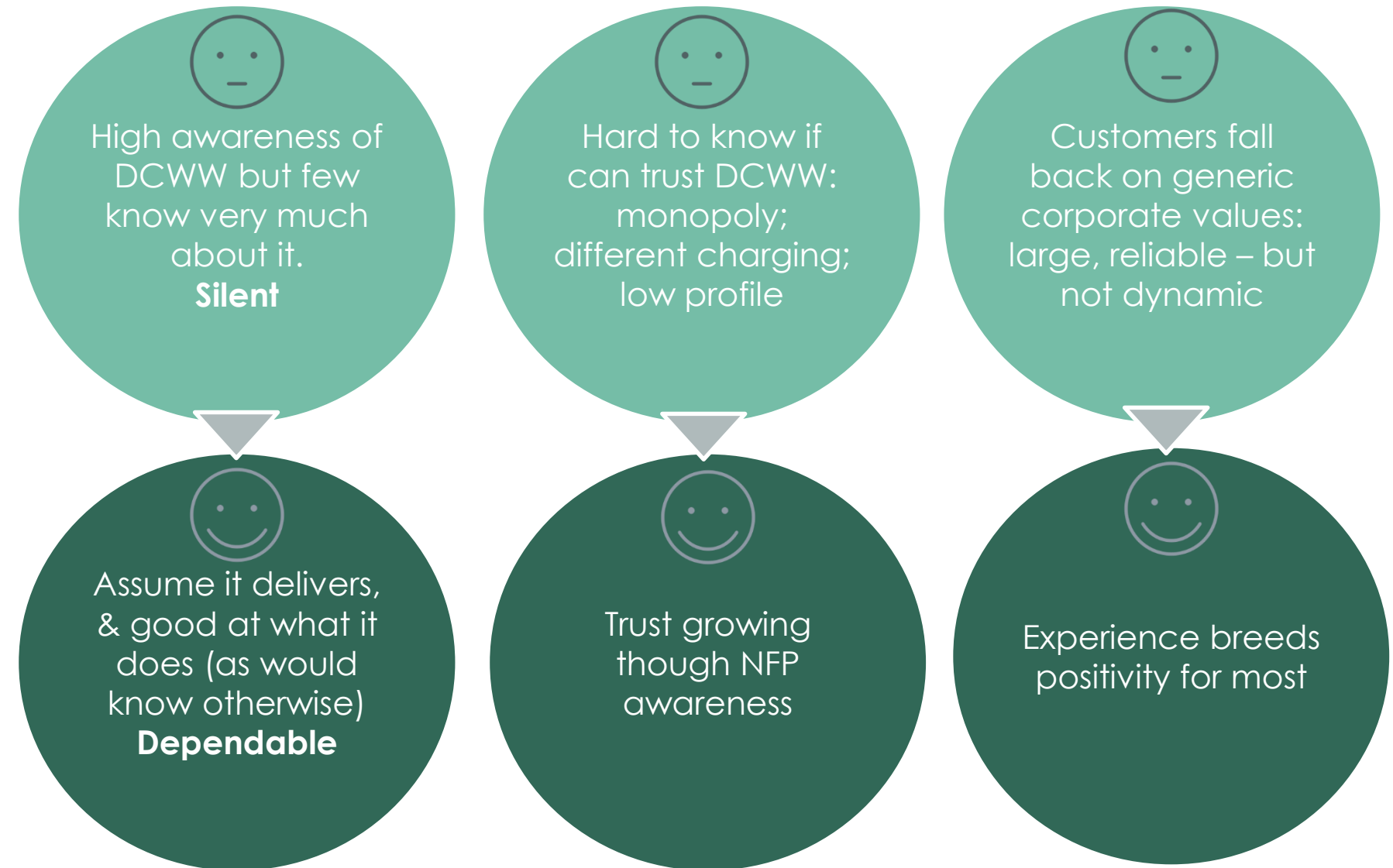
We have drawn
on a wider
body of
research
conducted by
Blue Marble
over the last
two years

Title	Date	Sample & method
Customer Priorities	Autumn 2016	12 group discussions
Customer Service Expectations	Spring 2017	15 group discussions 3 depths
Bill Profile Quantitative Survey	Spring 2017	Online survey with 600 customers
Worst Served Service Expectations	Spring 2017	43 customers via depths & mini-groups; 7 stakeholders
Response to Water 2050	Summer 2017	9 extended group discussions; 8 paired depths (vulnerable)
Vulnerability Report	Autumn 2017	20 paired depths (vulnerable); 4 stakeholder depths
Acceptability Pt 1: plan choices	Spring 2018	12 group discussions; 4 depths (worst served); 600 survey; online piloting with 24

A photograph of a rainy street scene. Several people are walking across a wet pavement, carrying umbrellas. On the left, a man in a dark jacket and hood walks towards the camera. In the center, a woman in a black coat and pink pants walks away from the camera, holding a floral umbrella. To her right, a woman in a bright pink jacket and black pants walks away, holding a grey umbrella and carrying a large brown box. Further right, another person in a dark coat and blue patterned hood walks away, holding a blue patterned umbrella. In the background, a white car with the license plate 'FG15 HKK' is visible. The scene is overcast and rainy, with reflections on the wet ground.

The customer view going into PR19

Perceptions of Welsh Water are evolving...



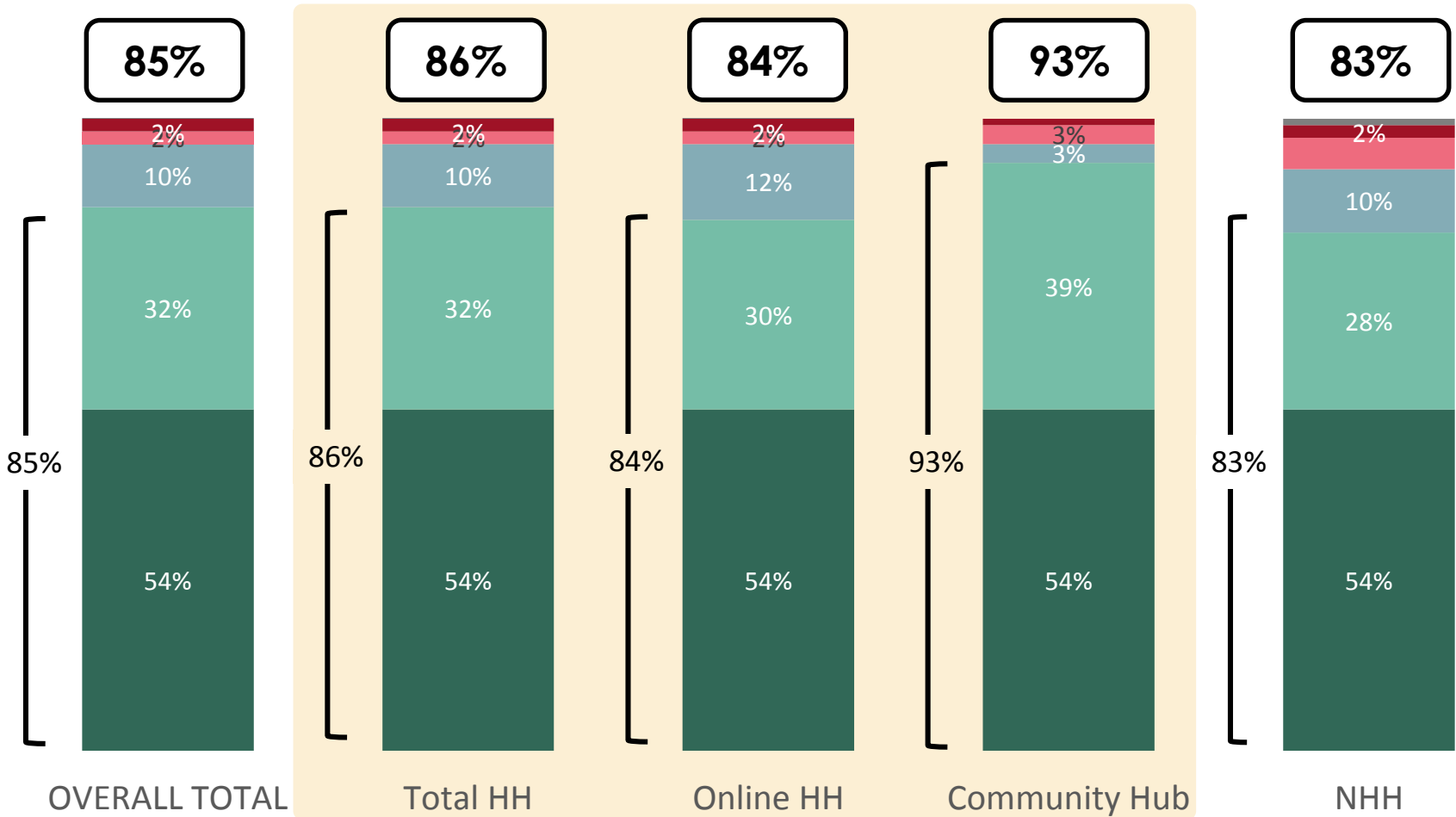
Neutral to positive starting point. Increase in trust observed over 2 years linked to NFP awareness increasing

Most customers – both household and non-household - are satisfied with their water supply and sewerage services. 'Seldom heard' household customers taking part in the Community Hub research show slightly higher overall satisfaction; could this be related to existing initiatives to reach more vulnerable customers and communities?



Satisfaction:

- Don't know/can't say
- Very dissatisfied
- Fairly dissatisfied
- Neither/nor
- Fairly satisfied
- Very satisfied



Exploring satisfaction with service

Most customers are satisfied...

Overall satisfaction:

85%

Don't know

10%

Very dissatisfied

32%

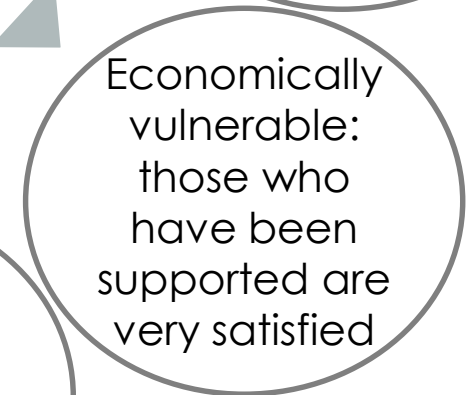
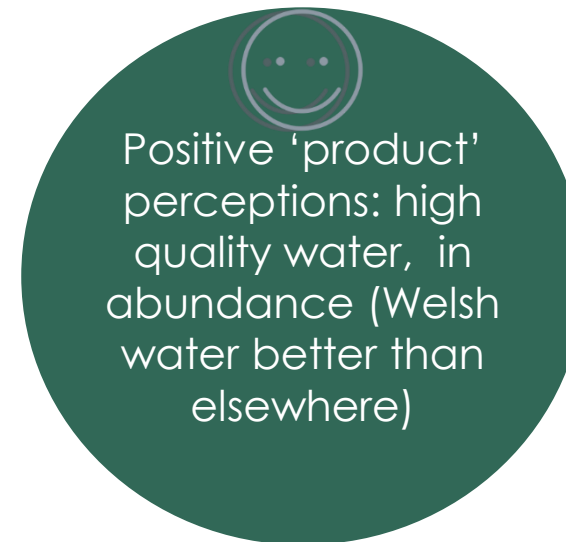
Fairly dissatisfied

Neither/nor

Fairly satisfied

54%

Very satisfied



Many default to giving positive satisfaction ratings in the absence of actual experiences. Small minority have negative perceptions.

Perceived VFM has scope to be better – over 3 in 10 customers don't give a positive rating. Business customers are notably more likely to think that the service they receive is very good value, and 'seldom heard' respondents (Community Hub) also give a slightly better score than general household customers.



Current VFM:

■ Don't know

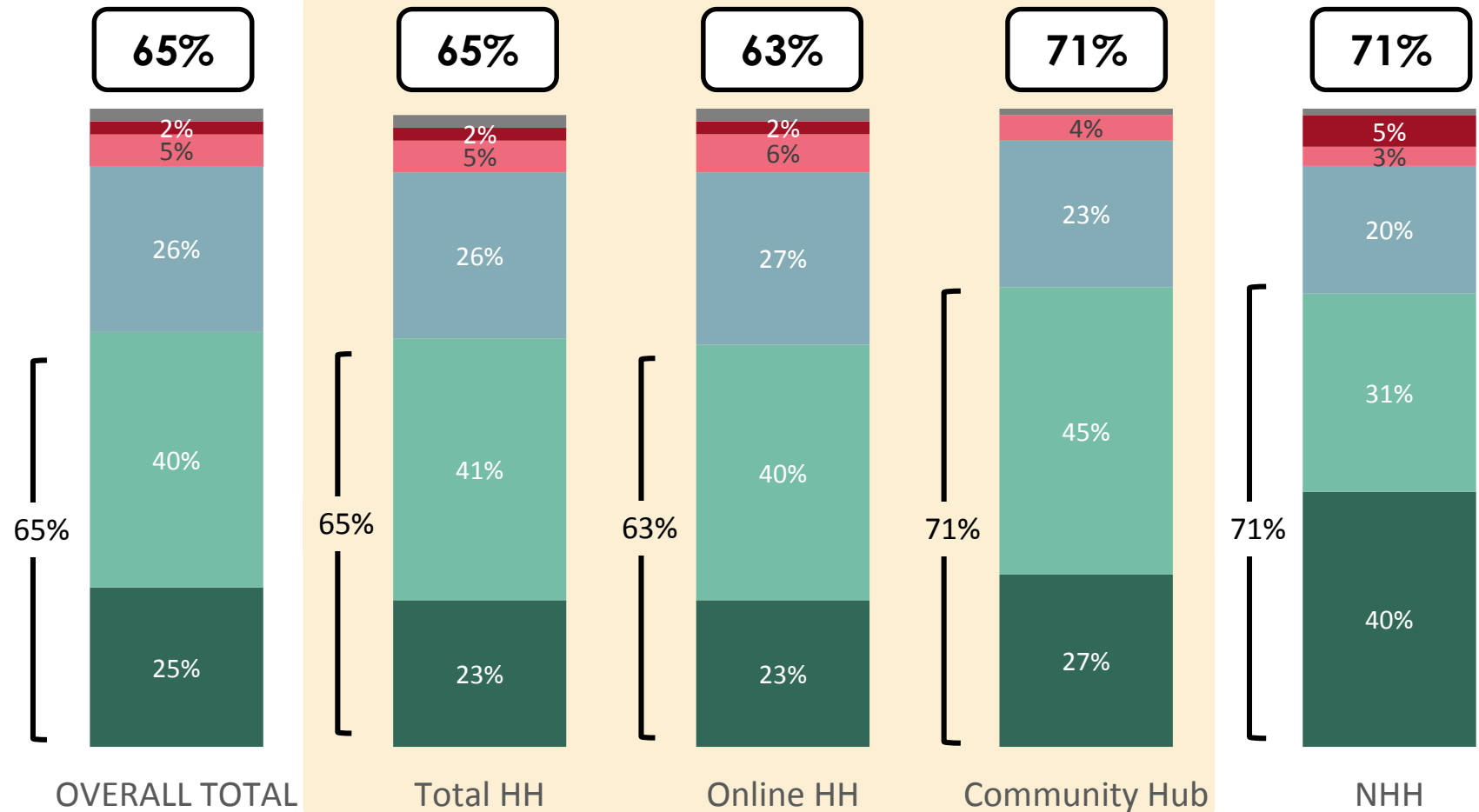
■ Very poor

■ Poor

■ Neither good nor poor

■ Good

■ Very good



Q16. Overall how would you rate the value for money of your water and sewerage services bill?
Base: OVERALL TOTAL (979), Total HH (809), Online HH (600), Community Hub (209), NHH (170)

There is scope to improve VFM...

Overall value for money:

65%

Don't know

5%

Very poor

26%

Poor

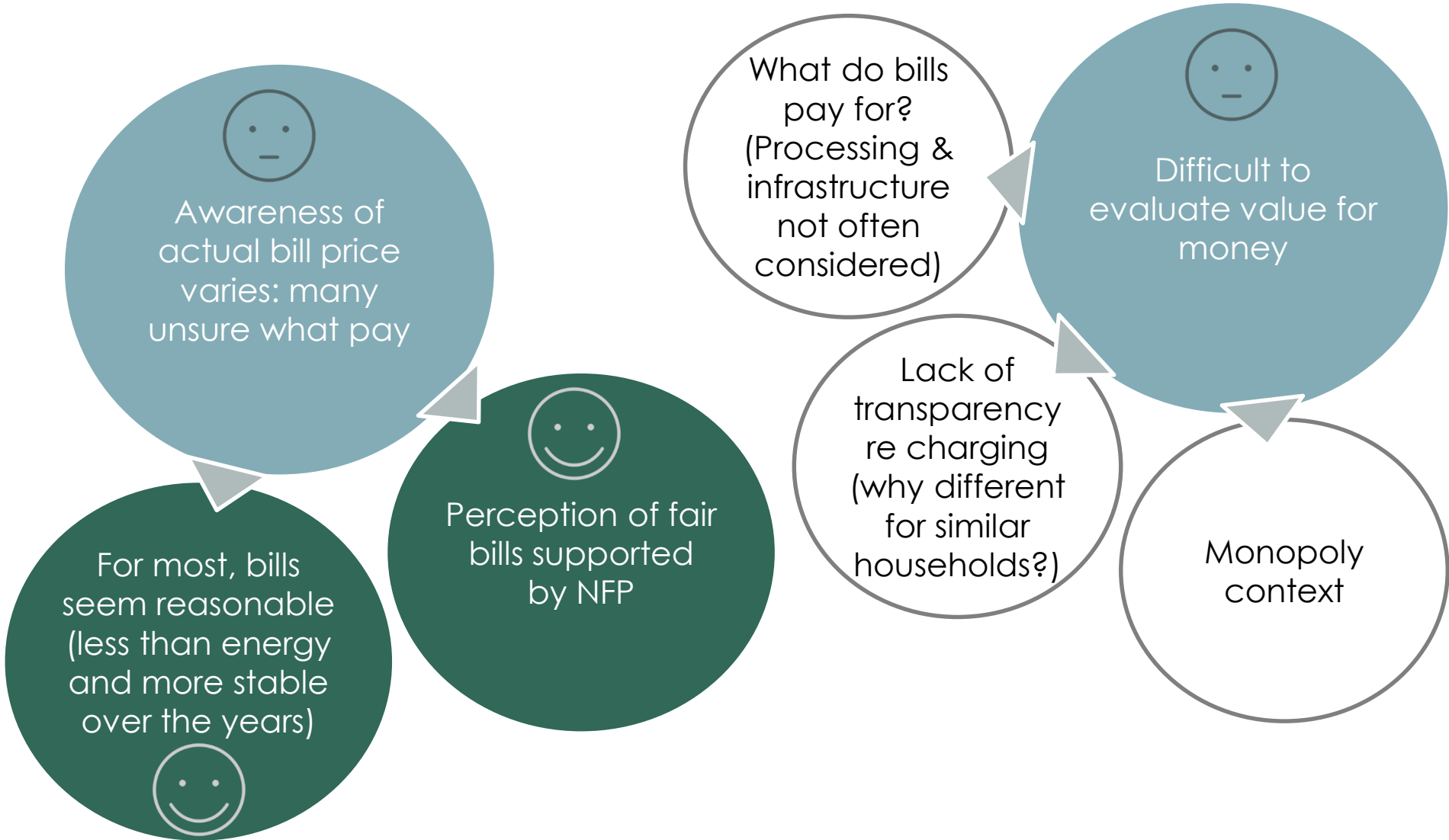
40%

Neither / nor

Good

25%

Very good

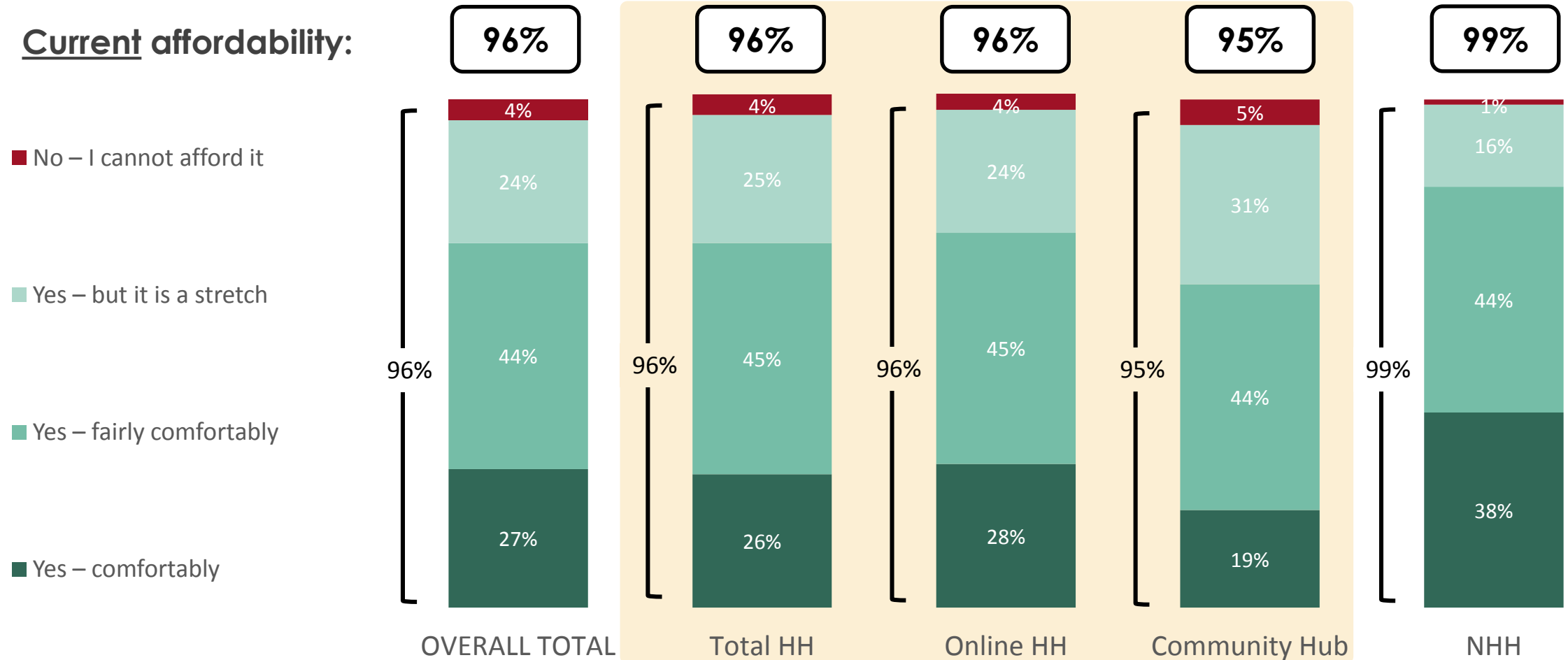


Much harder for customers to strongly endorse VFM

While value for money could be better for some, most customers - even the 'seldom heard' - claim they can afford their current bill; Notably though, a sizeable portion of households do find it 'a stretch' – particularly those interviewed in the Community Hubs (1 in 3). Business customers are generally finding affording their bill 'comfortable'.



Current affordability:



Q17. Do you feel that you can afford your water and sewerage services bill?
Base: OVERALL TOTAL (979), Total HH (809), Online HH (600), Community Hub (209), NHH (170)

All customers

All HH customers

All NHH customers



Satisfaction:

85%

86%

83%



Current value for money:

65%

65%

71%



Current affordability:

96%

96%

99%

A broadly positive customer outlook, but scope for improvement, particularly in terms of value for money

- Both household and non household customers are broadly satisfied with Welsh Water's current service
- There are signs that this can further improve with wider exposure to Welsh Water's positively regarded customer services
- However there's clear scope for perceived value for money to improve
- Current ratings may be affected by lack of awareness of how much they are paying and lack of knowledge of what the bill pays for
- The large majority of customers tell us they can afford their current water and sewerage bill
- However, there is a substantial minority – particularly of our 'seldom heard' households - who say that affording their bill is 'a stretch'
 - there's a need to carefully consider this group when looking at future plans



Overall customer response to the business plan



Firstly,
respondents
were shown a
brief overview
of the Business
Plan, to provide
'uninformed
response'



- Welsh Water are preparing a new business plan that will include performance targets for 2020-25. According to the business plan, some aspects of the service will improve and others will be maintained at current levels.
- Welsh Water will:
 - Continue to ensure tap water remains safe and clean
 - Continue to invest in improving water quality at rivers and beaches
 - Invest to prepare for long term challenges such as climate change
 - Make other improvements where necessary, while ensuring no aspects of the service deteriorates

Over the five
year period
2020-25 the
average yearly
bill will be...

5% lower than now if we **do not** include forecast inflation

1.6% higher than now if we **include** forecast inflation

Here is an illustration using an average household's yearly bill:

	This year 2018-19	Next year 2019-20	Average for the business plan across five years 2020-25
If we do not include inflation...	£440	£440	£418
If we include inflation...	£440	£449	£447

Inflation is the annual rate of increase in prices for goods and services, which is outside the control of Welsh Water.
Inflation is forecast to be 2% per year.

Household bill description

Over the five
year period
2020-25 the
average yearly
bill will be...

5% lower than now if we **do not** include forecast inflation

1.6% higher than now if we **include** forecast inflation

Here are some example illustrations of how businesses' bills will change from now:

	This year 2018-19	Next year 2019-20	Average for the business plan across five years 2020-25
If we do not include inflation...	£500	£500	£475
	£1,000	£1,000	£950
	£10,000	£10,000	£9,500
If we include inflation...	£500	£510	£508
	£1,000	£1,020	£1,016
	£10,000	£10,200	£10,160

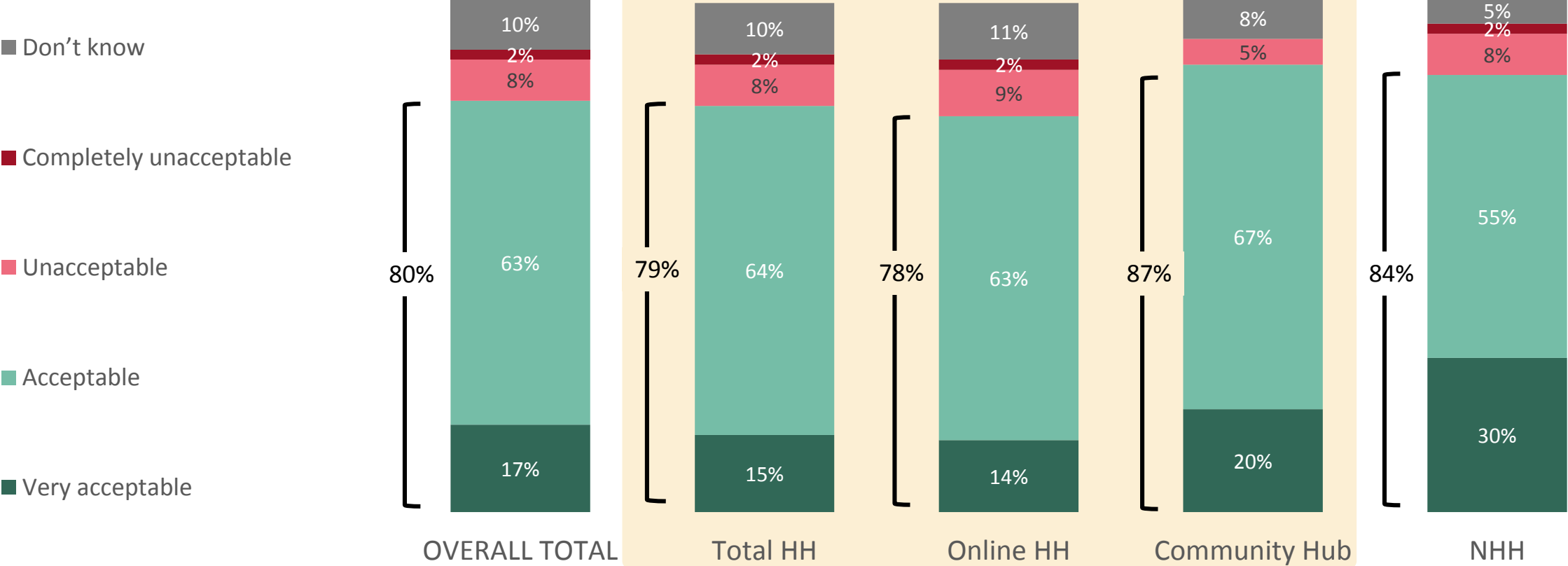
Inflation is the annual rate of increase in prices for goods and services, which is outside the control of Welsh Water.
Inflation is forecast to be 2% per year

Non-household bill description

Uninformed acceptability of the business plan is reasonably high: Over three-quarters of all key groups find it ‘acceptable’ or ‘very acceptable’. The ‘seldom heard’ customers, and non-household customers have slightly higher uninformed acceptability than the general household sample; could this reflect different in-going relationships with DCWW?



Uninformed acceptability:



Q18 What is your immediate reaction to this proposal and what the bill would be?
Base: OVERALL TOTAL (979), Total HH (809), Online HH (600), Community Hub (209), NHH (170)

Very acceptable

Cost is virtually the same
Household

Everything goes up and they need the money to make sure the sewage and water is safe
Household

To have a real life price decrease is exceptional in today's world.
Non-household

It appears that they are trying to keep the costs low despite the expected improvements which I feel is very customer focused.
Seldom Heard

Because Dwr Cymru give value for money and are a non-profit company so I trust them.
Household

Small increase year on year
Household

Acceptable

Clean water and maintenance of water and sewage pipes is essential
Household

Price increase not too high but they've tried to claim they're not putting the prices up
Household

Just seems fair
Household

Compared to energy companies this is very fair
Household

As long as they are transparent and honest. This change seems in line with all other sectors who are struggling to make ends meet
Non-household

(Completely) unacceptable

I pay enough already, after all it's only sky juice and you don't pay for it.
Household

It is hard to pay it now
Seldom heard

Because they are not giving the service that they say they do and our rivers are a total mess.
Household

Welsh Water is not for profit so as long as that stays the same I am happy.
Household

You are suggesting a link to inflation at 1.6% when most people don't get any pay rise - never mind one linked to inflation.
Household

They are trying to keep prices down to a manageable level.
Seldom heard

Water rates are too high in Wales and they should be brought down. Considering we are rich in Water why should Wales pay more?
Non-household

Uninformed acceptability is fairly consistent amongst most demographics, although social grade (and financial status) plays a part: those in higher social grades (AB) find it more acceptable while those less able to afford their bill now find it less acceptable. For non-households, there are signs that the smallest organisations find it slightly less acceptable.



% of different customer groups who think the plan is 'very acceptable' or 'acceptable'

Household

NHH

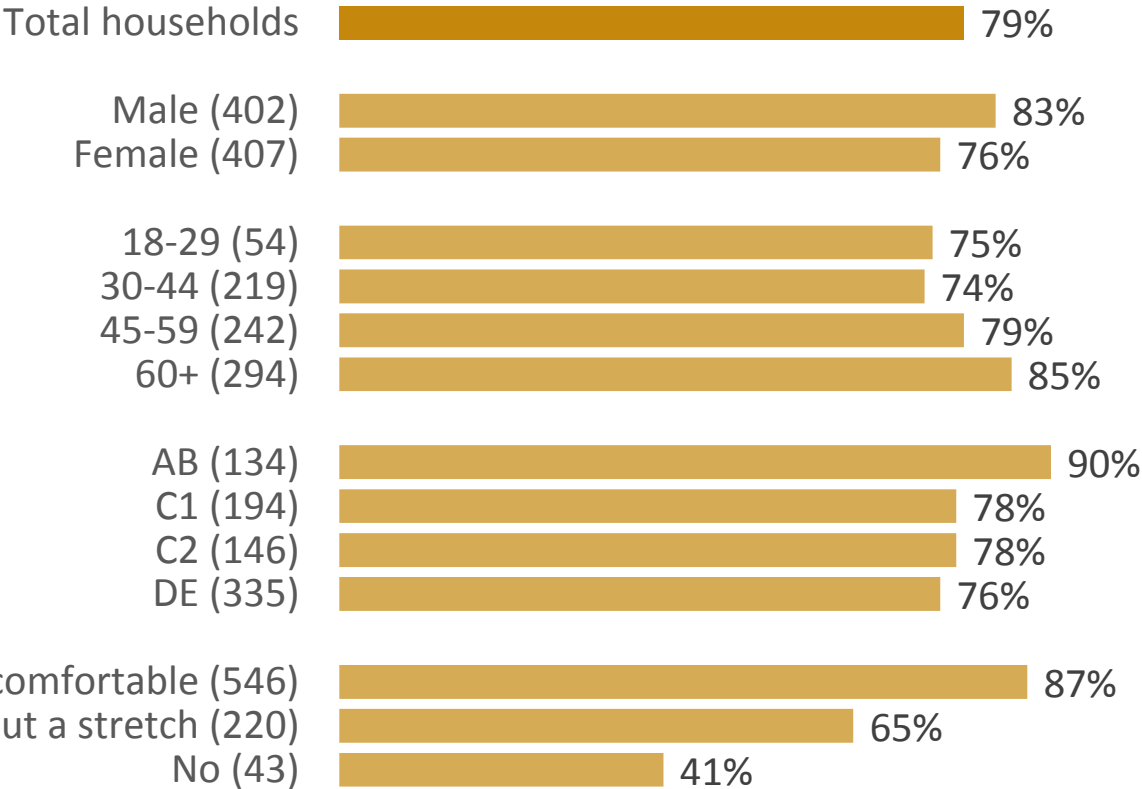
Gender

Age

Social grade

Can afford bill now?

Number of employees



Total non-households 84%



After seeing the proposed bill, overall affordability is high – and similar to current bill affordability. This reflects how customers generally don't see a significant change to what they will pay. However, the proportion saying that affording the bill could be 'a stretch' (up from 24% for today's bill to 29%); not everyone expects their income to match inflation.



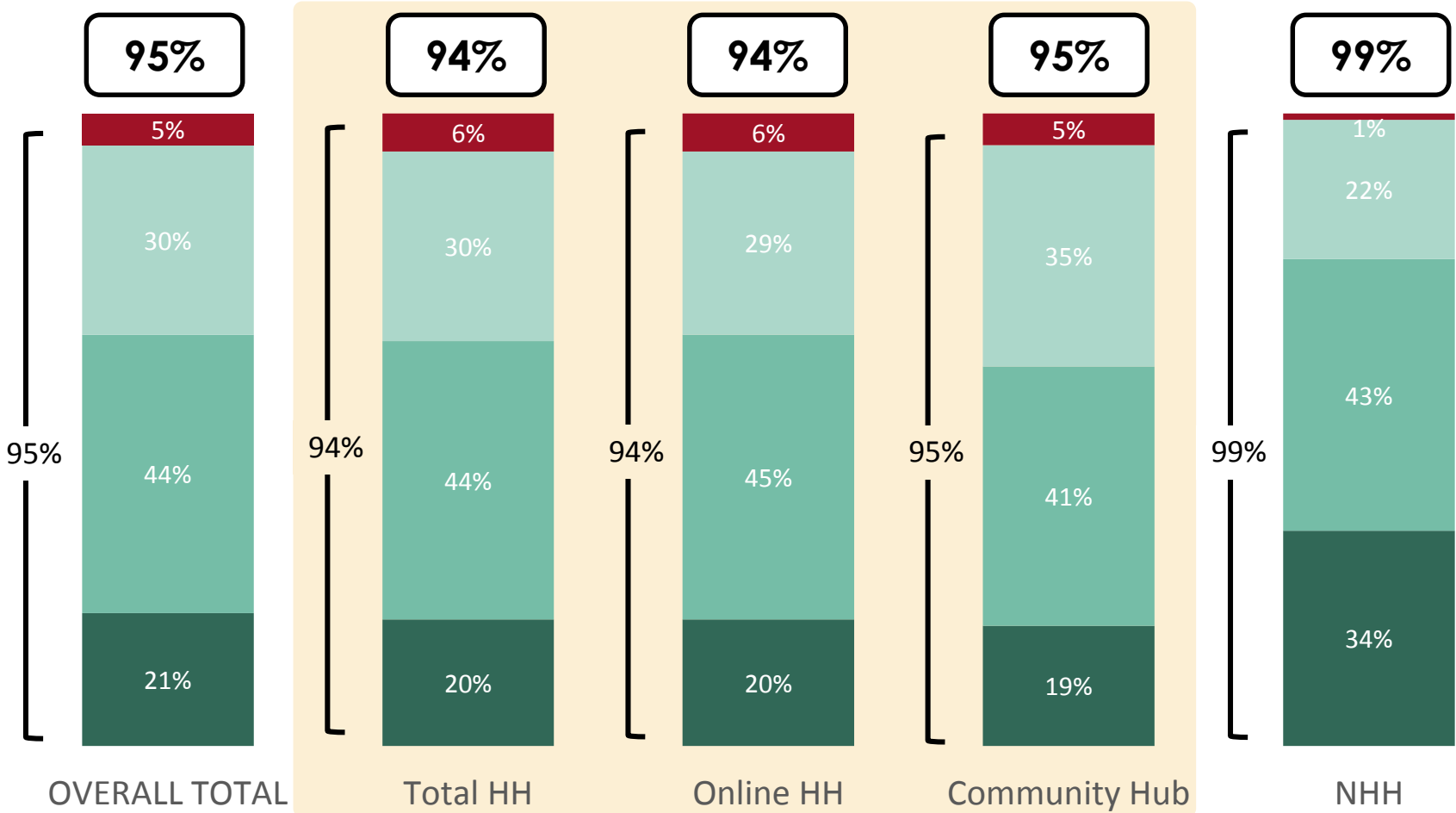
Plan affordability:

■ No – I cannot afford it

■ Yes – but it is a stretch

■ Yes – fairly comfortably

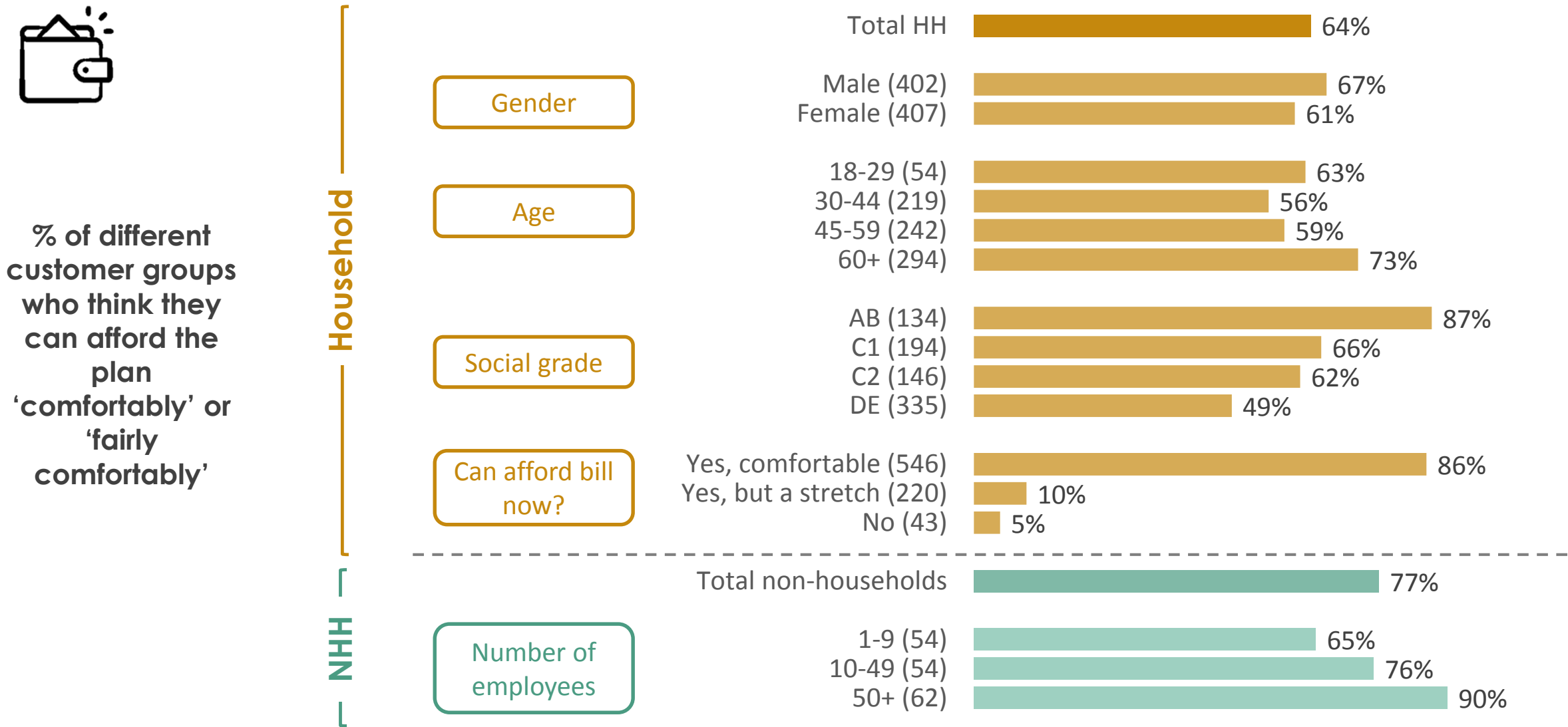
■ Yes – comfortably



Q27. Having seen this, do you feel that you will be able to afford the water and sewerage bill set out in the business plan?

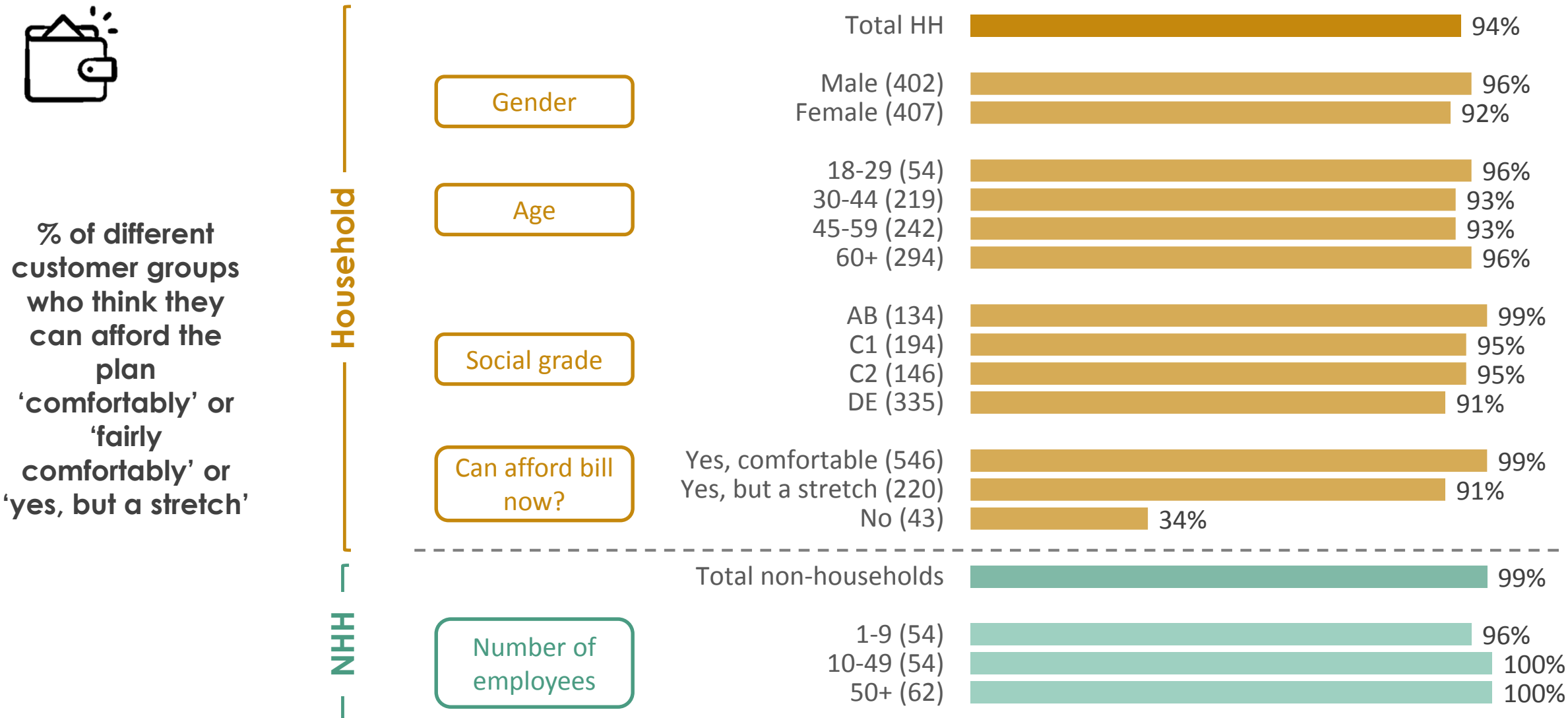
Base: OVERALL TOTAL (979), Total HH (809), Online HH (600), Community Hub (209), NHH (170)

When we look at customers saying the future bill would be *comfortably* affordable, there's a strong correlation both with social grade and how affordable people find their bill *now*. For non-households, there's also a strong relationship with size of business – larger businesses are more likely to find it comfortably affordable.



Q27. Having seen this, do you feel that you will be able to afford the water and sewerage bill set out in the business plan? **Base: Total Household (809); Total Non-households (170)**

Nearly everyone across all groups ultimately say they could afford the bill for the business plan (including those who say it could be 'a stretch'). The exception is those who currently cannot afford their water and sewerage bill – only a minority of these households say they could afford the proposed bill for 2020-25.



Q27. Having seen this, do you feel that you will be able to afford the water and sewerage bill set out in the business plan? **Base: Total Household (809); Total Non-households (170)**

Some nuance
in how
customers
interpret what
will happen to
the bill –
although most
feel it will be
about the same
as today

Interpretation of the bill change

- Customers interpret the future bill proposal in different ways: some think of it as a small increase, others a small decrease, but mostly it's 'about the same'
- For those who feel it's an 'increase', it's generally not deemed significant
 - lower than other utility bills
 - not a big increase...compared to a pint, Freddo, ciggies...
- Some are surprised about the difference between their own bill and the average – which can determine their response to the proposed bill

Inflation can divide views

- Most understand the concept of inflation to a degree...although it's not a natural consideration when looking at bills/prices
- On prompting, many are sympathetic to inflationary pressures and believe the nominal increase is not Welsh Water's increase
- However, for those struggling to afford their bill there's much more sensitivity to *any* increase (inflationary or not) and some express frustration as prices rise but their wages do not

Broader factors play a part

- A minority of customers question the cost of water: philosophical issue... or feel (potentially) ripped off because it is a monopoly
- Some simply trust Welsh Water to invest as is necessary, with Not For Profit coming up as a reassurance factor

Respondents were shown more detail – one page for each area of the business plan - plus a reminder of the bill



N.B. Household customer stimulus is shown here. Non-household stimulus is adapted to be relevant to organisations. Full detail in appendix

Clean safe water for all

Improving performance / Increasing investment	Maintaining	New Initiative
Reduce leakage through better detection and pipe replacement: will cut leakage by 15%		Over the years Welsh Water has reduced leakage significantly. It's increasingly hard to reduce because the leaks become harder to find. Innovation will help reduce the amount of all water leaked from 20% to 17% (a cut of 15% as a proportion of what it is now).
Continue to invest in water quality to maintain 99.99% score		Welsh Water will work with farmers and landowners to protect water sources from the growing threats of pesticides and other pollutants.
Programme to replace lead pipes for 7,000 affected homes – at no cost to those customers		Lead water pipes owned by customers in or near the home can be bad for health. Although Welsh Water does not own these pipes, it will help to replace them and achieve the Welsh Government's goal of a 'lead free Wales' over the long-term.
Pipe replacement programme to reduce bursts and cases of 'no water' by 30%		On average, burst pipes currently cause customers to lose supply for 16 minutes per year – this is the way the industry measures its performance. The business plan will reduce this measure to 8 minutes in 2025.

Safeguard environment

Improving performance / Increasing investment	Maintaining	New Initiative
Investment to reduce wastewater spills and overflows in wet weather – improving the water quality of over 200km of rivers		Welsh Water works with Natural Resources Wales to reduce overflows from sewerage and drainage systems. Their plan will improve the official water quality of 200km of rivers.
By 2025 Welsh Water will produce a third of their own energy needs from sewage treatment and other activities to reduce running costs		Welsh Water will increase the energy they generate from treatment of sewage and from their wind turbines and solar panels. They use this energy to reduce their costs.
Reducing the number of pollution incidents caused by things going wrong - from 110 to 90 a year		Unexpected releases of sewage happen when there are failures at treatment works or overflows from the sewerage network after heavy rain. These will be reduced through better maintenance, smarter monitoring systems, and increasing capacity.

Put things right

Improving performance / Increasing investment	Maintaining	New Initiative
Permanently fixing repeated service problems such as low pressure for 250 of the 1,500 homes who suffer them		Around 1,500 homes (0.1% of customers) receive poor service (low pressure, or a high ongoing risk of sewer flooding) because fixing the issue where they are would be very expensive. Welsh Water will reduce this number by 250 over the 5 years.
Investing to protect treatment works and networks from the effects of severe weather		Welsh Water will invest in their critical water and sewerage treatment works to help them withstand extreme conditions and prevent service failure. This might be adding back up energy generation capability, or increasing on-site storage of treatment chemicals.
Offering free fix service to stop leaking taps and toilets which will reduce water usage and save customers money		A great deal of water is lost through taps leaking or toilets continually running due to a malfunction. This is a waste of water, and can add to customer bills if they are metered. Welsh Water will launch a service to fix these for free.

Fair bills for everyone

Improving performance / Increasing investment	Maintaining	New Initiative
Welsh Water will help more customers who struggle to pay their bills, by putting them on a special lower tariff if they are genuinely in need		Welsh Water's lower tariffs help those who struggle to pay, and improve their overall collection rate. Because Welsh Water have no shareholders, they use some of their profits to do this. Welsh Water will increase the number of customers helped from around 100,000 to 150,000.
Welsh Water will reduce running costs and improve efficiency by around 10%		Welsh Water will keep finding better ways of doing more for less, including investing in research and innovation, to reduce their running costs. Because they are not for profit, all savings are passed through directly to customers. Welsh Water will achieve efficiency savings of around 10% over 2020 to 2025.
Welsh Water will help customers to save money by reducing water consumption, and offer them a free meter where it would help them to spend less		Every year Welsh Water will continue to install free meters for thousands of customers who choose to have one, so they only pay for what they use. Welsh Water will continue to provide free water efficiency advice to help customers save money and reduce consumption by about 5%.

More sustainable communities

Improving performance / Increasing investment	Maintaining	New Initiative
Expanding education programmes to teach children about water conservation and climate change		Welsh Water will increase the numbers of children benefitting from educational programmes from 67,000 to 75,000 per year.
Reducing flooding in built up areas when heavy rain overwhelms sewers.		Heavy rainfall can cause sewers to overflow, causing flooding in built up areas where drains are under most pressure. Welsh Water will develop more green areas to act as 'sponges' in residential areas to ease pressure on sewers.
Investing in visitor and recreation centres to allow more customers to enjoy the natural environment and learn about what Welsh Water do		Welsh Water plan to increase the numbers who use their visitor centres from 570,000 to 830,000 visits per year. They will open a major new visitor centre in South Wales and make improvements to existing ones in North, Mid and West Wales.
Investing in community projects to meet wider community needs		Welsh Water will invest in at least one major project per year for the most disadvantaged communities Welsh Water serve. The projects directly involve the communities to ensure significant and long-term benefit.

Personal service

Improving performance / Increasing investment	Maintaining	New Initiative
Helping more customers who need priority assistance when things go wrong		Welsh Water provide services to meet particular customer needs, such as braille bills. They also keep a register of who needs priority bottled water when there are supply interruptions. They will do more to reach customers in need, roughly doubling the number on their registers.
Investing in their people & digital services to maintain high customer satisfaction and ensure you can reach a real person on the phone		Welsh Water will continue to give a choice of how to contact them: on the web, by phone (to a contact centre in Wales), or by post. They will make sure they continue to beat the rest of the industry on customer satisfaction and trust scores.
Increasing customer awareness of Welsh language services		Welsh Water offer the option for customers to contact them and receive information in Welsh. Welsh Water will do more to make sure customers are aware of this, and expect to increase the number of customers registering for their Welsh language services.

All customer groups give a strong acceptability rating after they are shown detailed information about the draft business plan. The more ‘seldom heard’ customers (Community Hub) give the highest overall acceptability. The greatest improvement over the ‘uninformed’ rating is amongst the general online household sample (moving from 78% to 92%).



Informed acceptability:

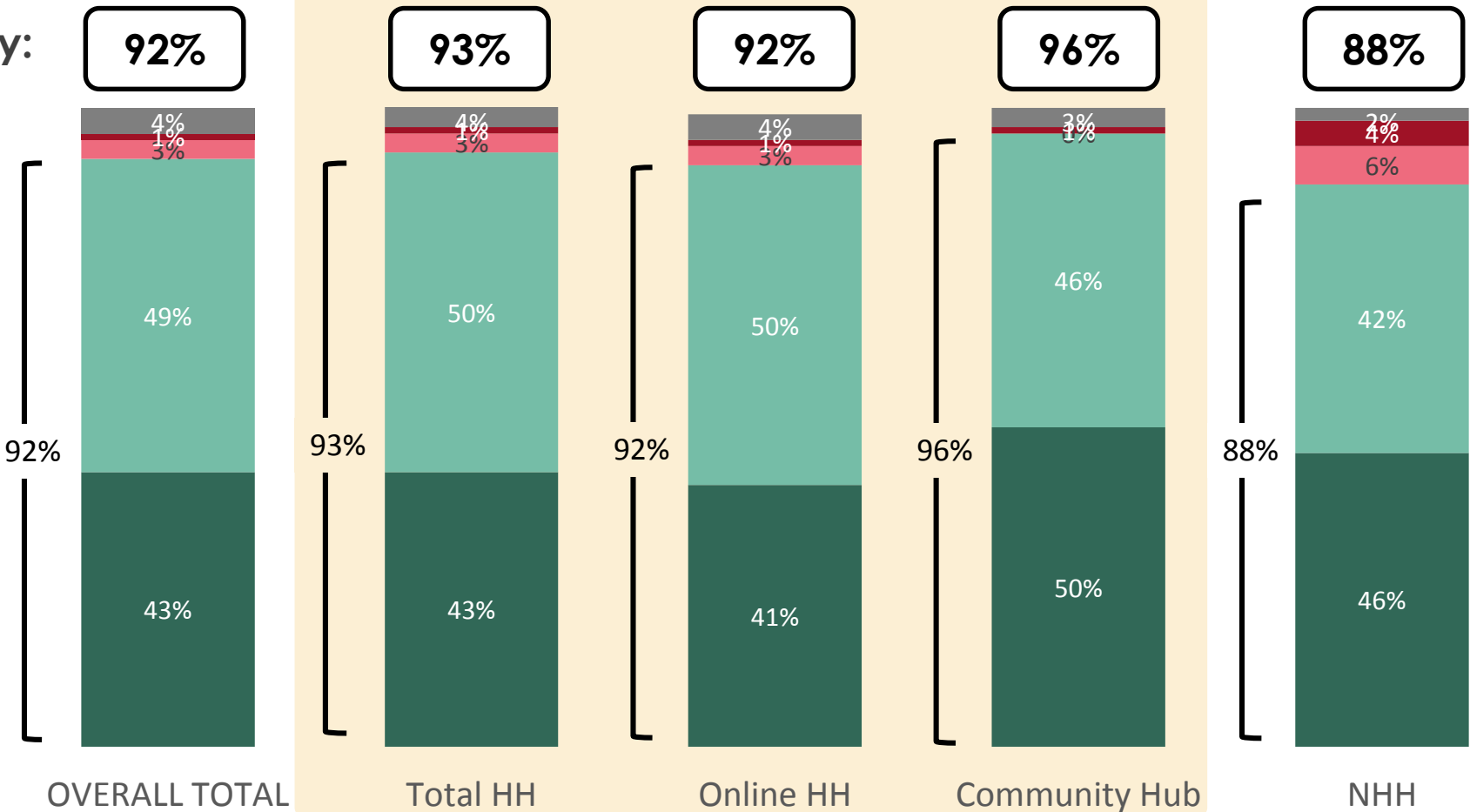
■ Don't know

■ Completely unacceptable

■ Unacceptable

■ Acceptable

■ Very acceptable



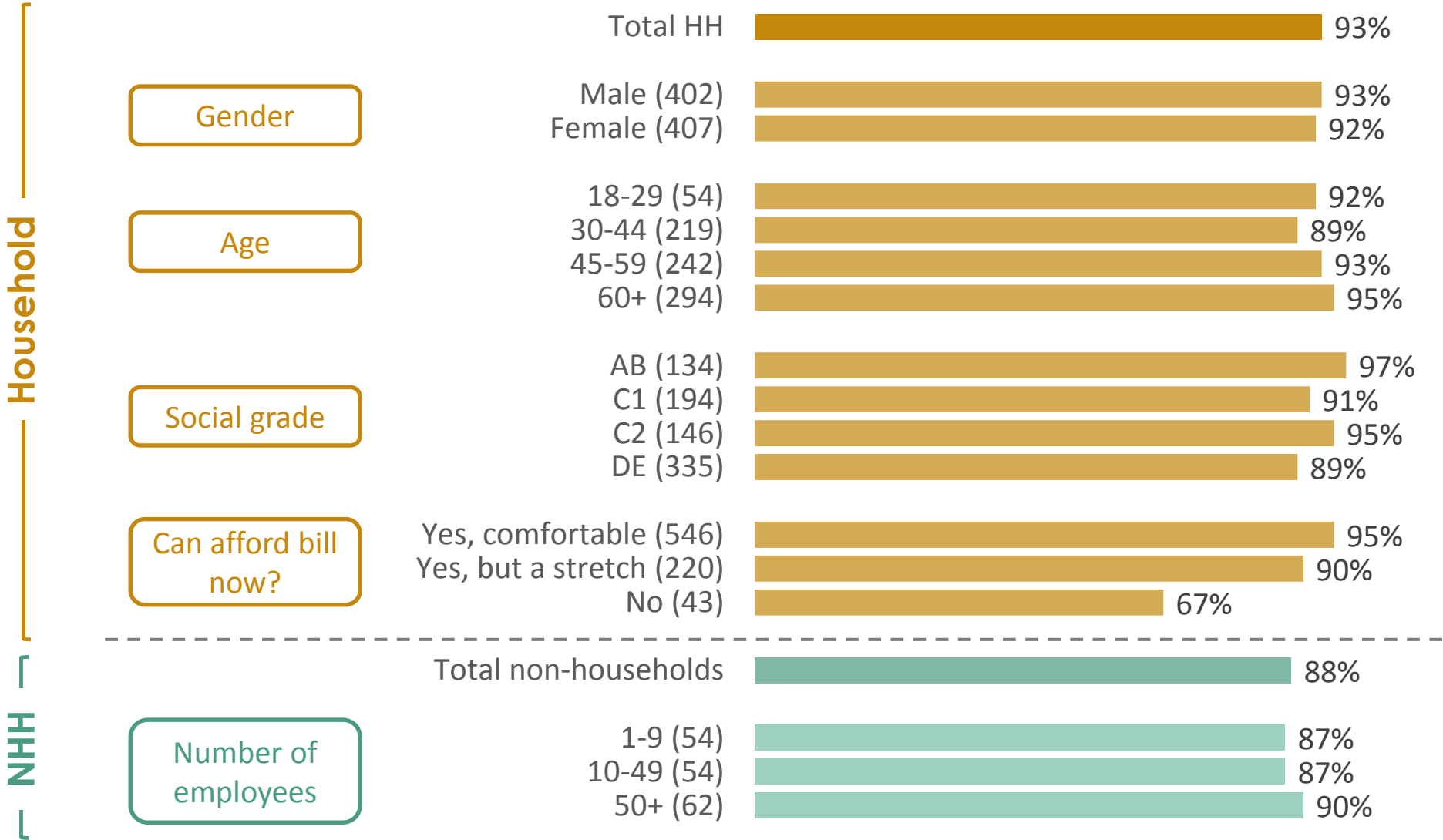
Q24.Thinking of everything we have shown you about the plan, including the investments, service improvements, and the bill reduction (before inflation), how acceptable or unacceptable do you think the proposed plan is?

Base: OVERALL TOTAL (979), Total HH (809), Online HH (600), Community Hub (209), NHH (170)

After seeing details of the plan, there is near universal acceptability. The only group where there is significantly lower acceptability is those who cannot currently afford their bill.



% of different customer groups who think plan is 'very acceptable' or 'acceptable'



What's driving positive acceptability?



- The very fact that DCWW is planning ahead: perceive there is more to delivering water services than customers realise, including protecting future customers
- NFP (most people are aware to some degree)
- Specific elements indicating
 - Adding value (free fix service; special tariffs; lead pipe replacement)
 - Innovation/solutions – environment related (Rainscape; generating renewables)
 - Customer-centricity and empathy (education; Priority Services)
- Those believing that the plan reflects more service for lower bills
- No trade off: no sacrifices/reduced investment programmes

What's driving negativity?



- Personal economic circumstance – and specifically affordability
- Low understanding of Welsh Water: what it does
- Cynical: how manage to bring costs/bills down with so many investments
- 10% efficiency saving: job losses? 'Doing things on the cheap'?
- Customers already perceiving that they are paying over the odds/more than the average
- Investment emphasis: wanting to see more/less spent according to own views and preferences
- (Gap: grey water innovation)

Very acceptable

You may have cheaper water bills. It may help people like me who can't pay my bills. Trying to update the old pipes. Trying to reduce environmental impact.
Seldom Heard

If the plan works out, the company will continue to improve its services whilst reducing its bills to the customer, how can you say anything else but acceptable?
Household

They're doing a lot for the customer and the future and inflation isn't in their control
Household

Lowering internal costs by becoming more efficient and passing savings to customers.
Non-household

Because, as a not for profit company, I will be getting back what I put in. So it's a win situation.
Household

Replacing lead pipes free would be good, also fixing leaks and dripping taps.
Seldom Heard

Acceptable

Looks all good in writing but will it actually happen
Household

I like that you are reducing your operating costs by finding efficiency savings. And that you are helping those most in need.
Household

Many projects. that are very worthwhile and I can see that Welsh Water is trying to minimise cost increases by hopefully reducing their own costs
Household

Seems a fair plan and some savings for investing in the future of welsh water products.
Non-household

It's affordable, and the works are necessary, and the poorest need the help,
Household

(Completely) unacceptable

'Not for profit' that's a joke.
Household

Too expensive for me, for people with low income.
Seldom heard

You need to cut out the fluffy community based things that you are doing for 'free' - you are not a charity we choose to donate money to, you are providing a service and charging us above the odds to deliver things which are not part of that core contract.
Household

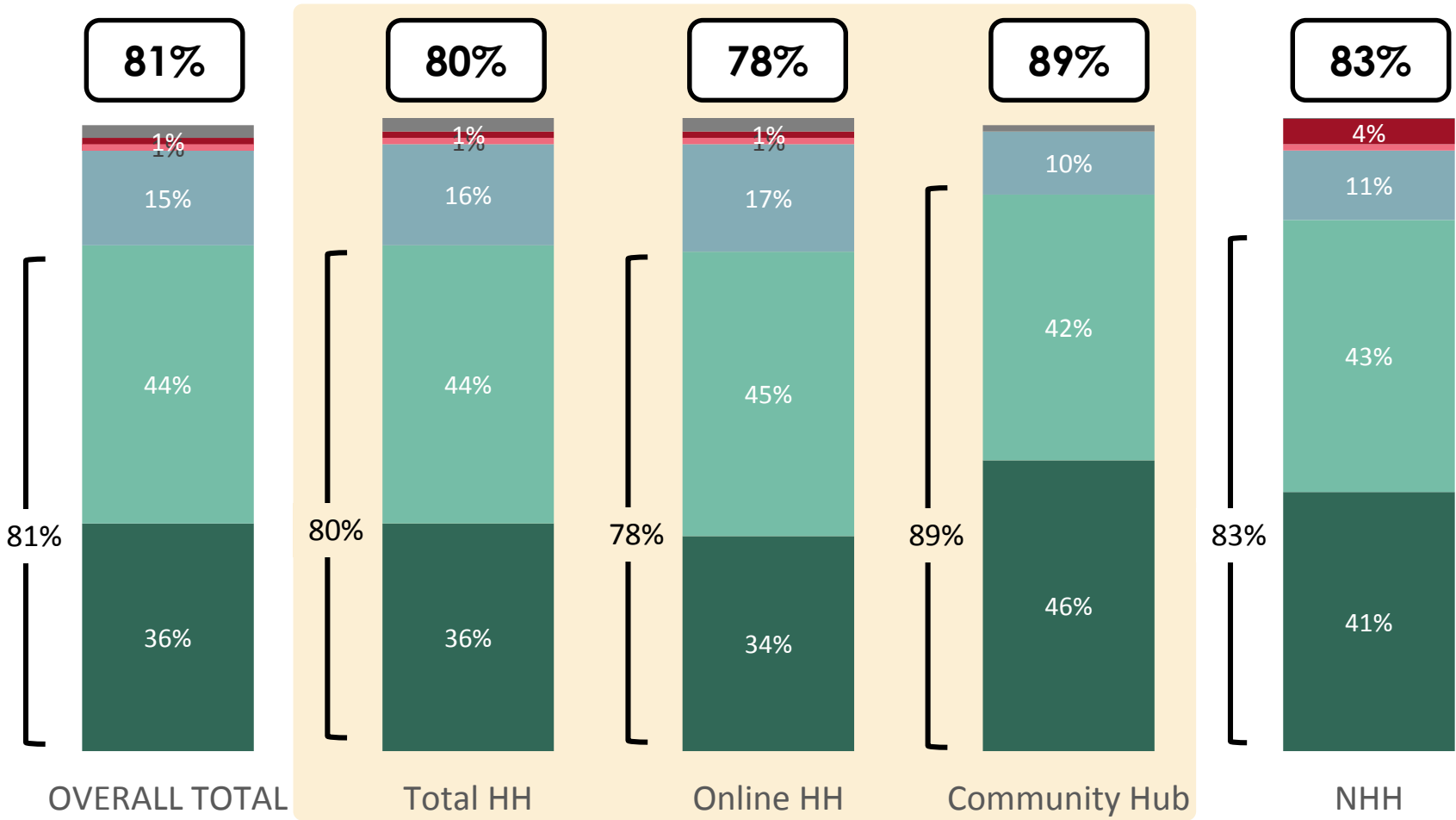
Thames Water is cheaper than Welsh Water - how can that be possible when Wales is so rich in Water? WW must work harder to improve efficiency.
Non-household

Explaining the plan significantly increases the perceived value for money from the level given for today's service . Overall VFM for the proposed plan is 16 percentage points higher than current VFM (81% vs. 65%).



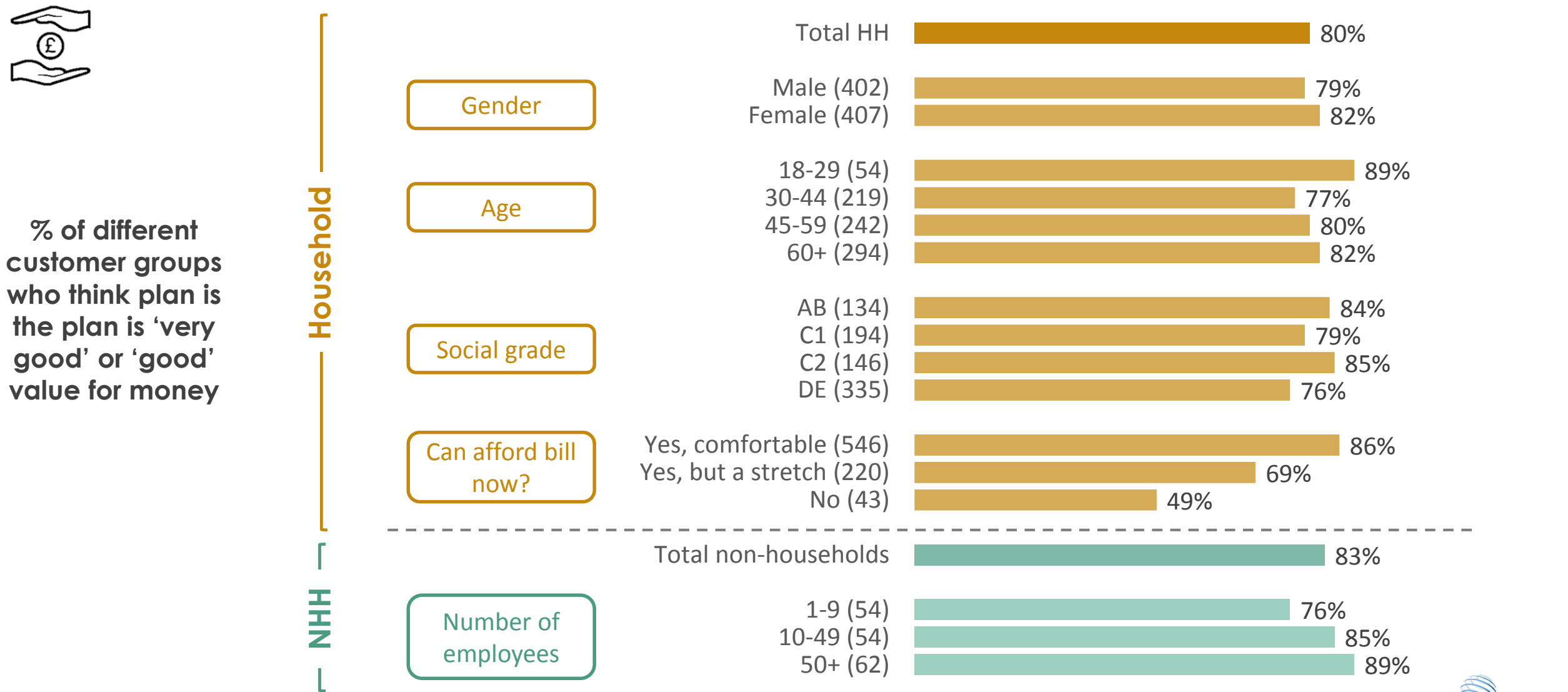
Plan VFM:

- Don't know
- Very poor
- Poor
- Neither good nor poor
- Good
- Very good



Q26. Overall how would you rate the value for money of the plan we have shown you?
Base: OVERALL TOTAL (979), Total HH (809), Online HH (600), Community Hub (209), NHH (170)

Perceived value for money of the plan is affected by how comfortably customers can afford their bill today; We see those who can only afford 'at a stretch' and moreover those who cannot afford at all, are less likely to think it's good value.



All customers

All HH customers

All NHH customers



Uninformed acceptability:

80%

79%

84%



Plan affordability:

95%

94%

99%



Informed acceptability:

92%

93%

88%



Plan value for money:

81%

80%

83%

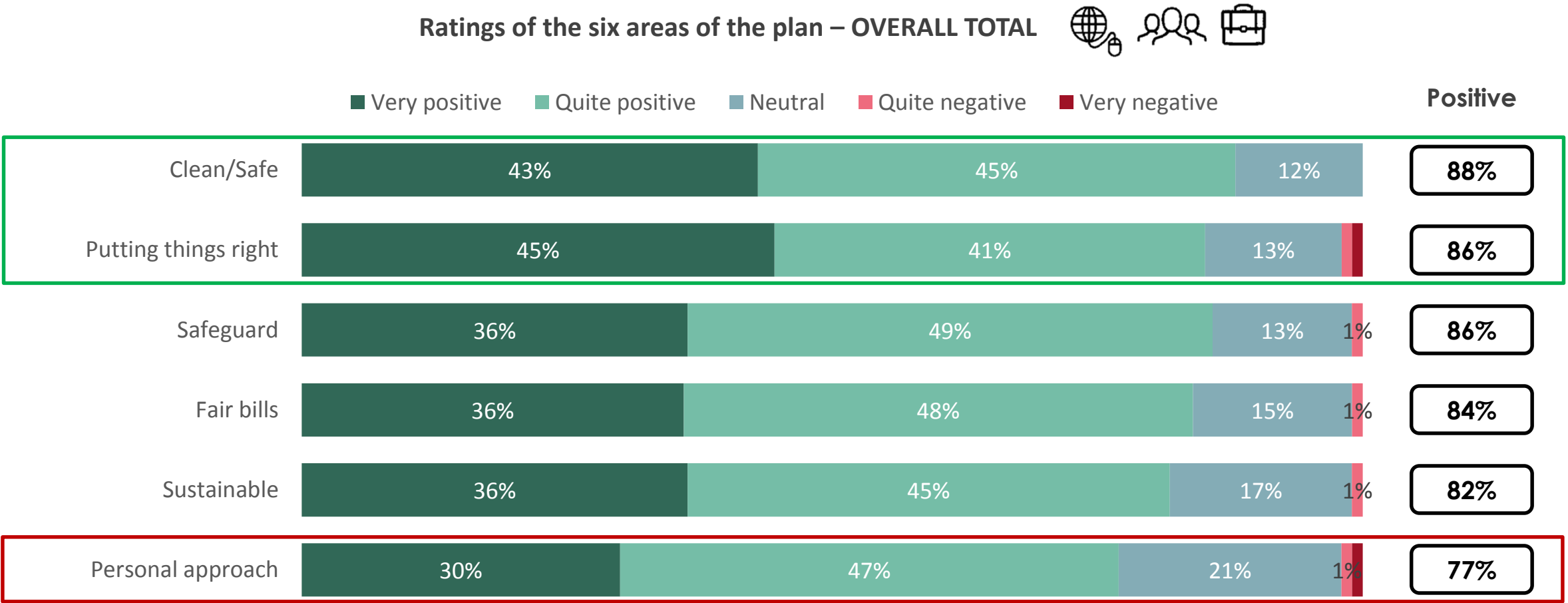
Overall a positive response to the proposed business plan

- The great majority of both household and non household customers find the plan acceptable and affordable
- ...although a sizeable minority don't find the plan *comfortably* affordable (around 3 in 10 households say it will be 'a stretch'); this is strongly related to affordability today
- Value for money of the plan (after customers are informed about it) is rated above value for money today
- This underpins how informing people about what their bill pays for and the work Welsh Water are doing is able to boost value perceptions (in tandem with a bill that is being kept under control)
- Overall a positive approach to the proposed initiatives
- People often mention that, on balance, these actions are 'necessary' and worthwhile, with the bill generally seen as fair.
- Yet for some there is sensitivity around bills and inflation, as their own wages are not going up

A close-up photograph of a woman with light brown hair and blue eyes, smiling slightly. She is holding a small yellow flower in her right hand, which is raised towards her face. The background is a blurred indoor setting with light-colored walls and a window. A semi-transparent teal banner is overlaid across the middle of the image, containing the text "Evaluating the Business Plan in detail" in white.

Evaluating the Business Plan in detail

Combining all household and non-household customers, the great majority are *broadly* positive about all areas of the plan, although not always *strongly* enthused. The most widespread endorsement is for ‘clean / safe water’ and ‘putting things right’. ‘Personal approach’ is the least strongly endorsed area of the plan.



Put things right if things go wrong

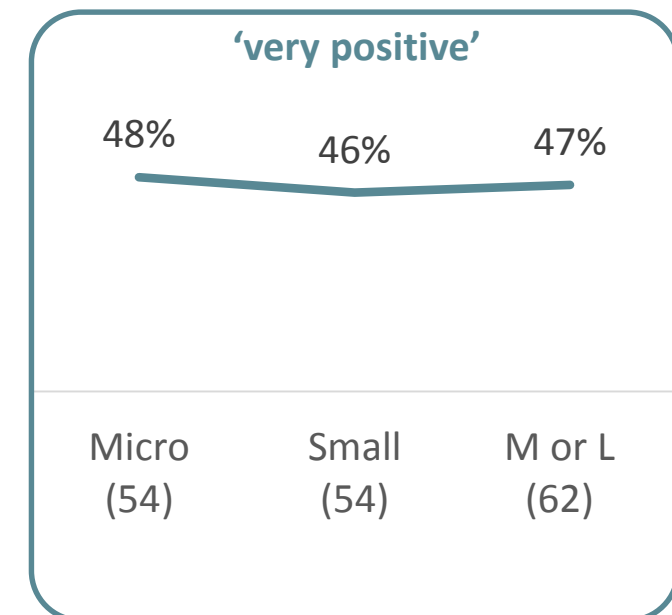
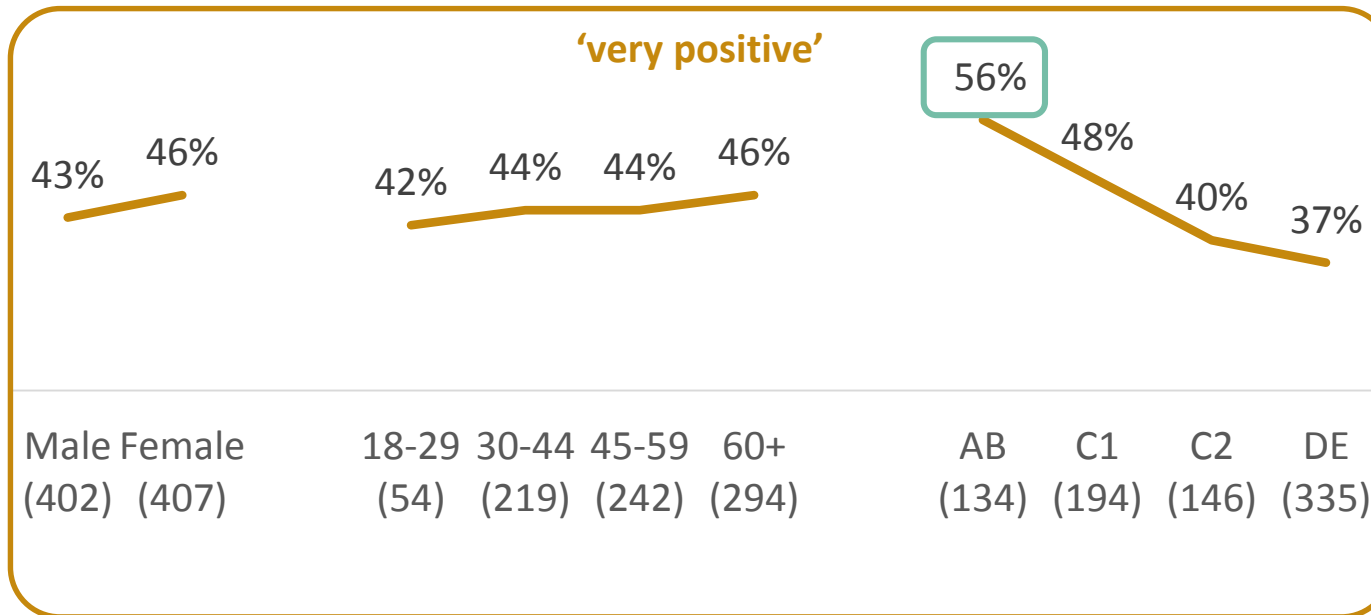
37

The area of the plan that gained the most 'very positive' sentiment, particularly driven by higher social grade (AB) customers



**HH 86%
Positive**
(45% - 'very positive')

**NHH 86%
Positive**
(45% - 'very positive')



NN% Significantly higher than other subgroups
NN% Significantly lower than other subgroups

Q22a. <NAME OF STIMULUS>: How positive or negative do you feel about this part of the plan?

Base: Total HH (809), NHH (170)

Seen as
important for all

But, support for
services varies
depending on
how relevant
they are to
people's lives



Free fix service



- Largest support for this service: but also cynicism that it is "too good to be true"
- Some struggle to understand how the service will work from a cost and logistical perspective
- Unexpected for utility co to be taking this service on
- Minority; this type of maintenance is personal responsibility not DCWW's



Helping worst served

- Emotive: everyone should have same service vs. their choice to live there
- Target is a key discussion point. Some think DCWW should fix all problems, others appreciate the scale of the challenge



Prevent service failure

- General awareness that protection against severe weather is necessary
- However, few strong opinions as no direct impact on them personally

NHH
sample

- Compensation promise is an expectation (gets muted response)
- As well as fixing dripping taps, want free leak detection services on premises (some have expensive experience of leaks)

Leaking taps and toilets must waste so much water. Good thing to reduce this
Future, Aberystwyth

Free fix service, good for everyone
Pre-Family, Swansea

Like the free fix but don't believe this could happen
Vulnerable, Swansea

Repeated service problems should be fixed regardless of cost
Pre-Family, Pembroke

250 homes isn't many
Family, Caernarfon

Good to reduce risk of flooding, shows they care
Future, Rhyl

A nearly universally endorsed area of the plan, with particularly positive sentiment amongst high social grade customers. People understand the importance of maintaining high water quality.



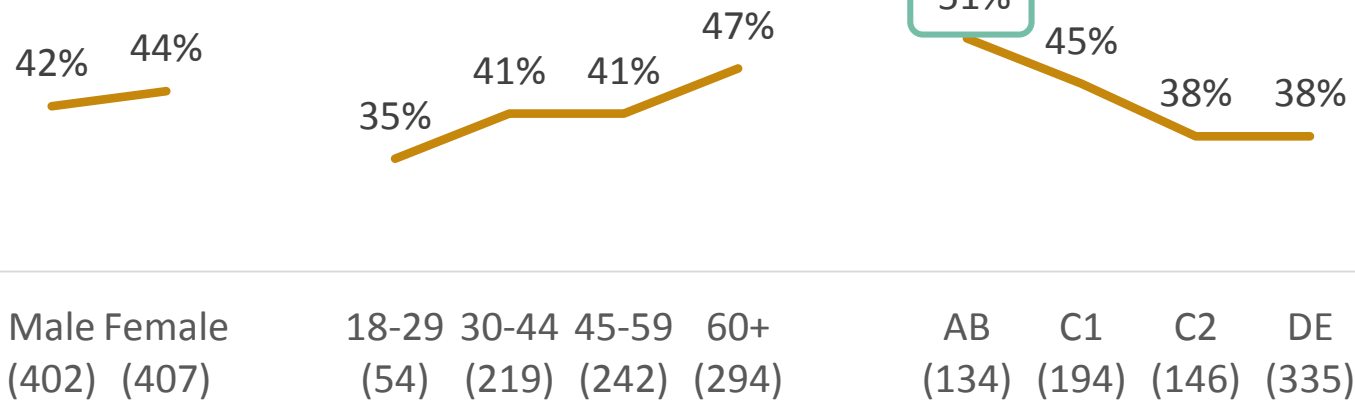
**HH 88%
Positive**

(43% - 'very positive')

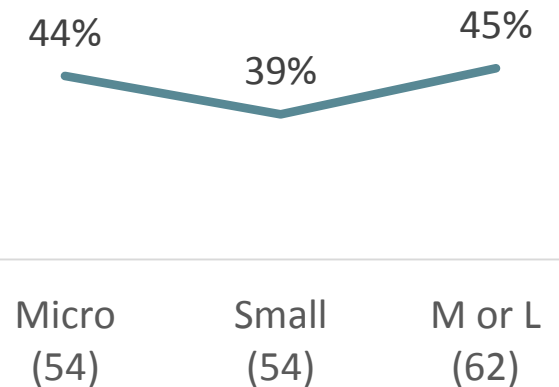
**NHH 84%
Positive**

(43% - 'very positive')

'very positive'



'very positive'



NN% Significantly higher than other subgroups

NN% Significantly lower than other subgroups

Q22a. <NAME OF STIMULUS>: How positive or negative do you feel about this part of the plan?

Base: Total HH (809), NHH (170)

Seen as the most important customer promise as it satisfies a basic need

All elements are seen as closely interlinked and important in maintaining high levels of water quality

Lead pipes

- Impressed DCWW are taking on responsibility for this
- However, some feel it is personal responsibility to replace lead pipes and not the duty of DCWW
- Slight uncertainty about how the lead pipe replacement service would work in practice and how many homes in total are affected

*Should have top standard pipes, leakage detection should be higher, great water score.
Future, Rhyl*

Water Quality

- Support for maintain current high standards / performance

*Renovating lead pipes is great
Family, Caernarfon*

Leakage

- Reduction in leakage seen as positive
- For a minority DCWW should reduce leakage by more than 15%. Shocked that current leakage (20%) is higher than expected

*Reduce leakage, 20% very high, need to reduce
Empty Nester, Aberystwyth*

Pipe replacement

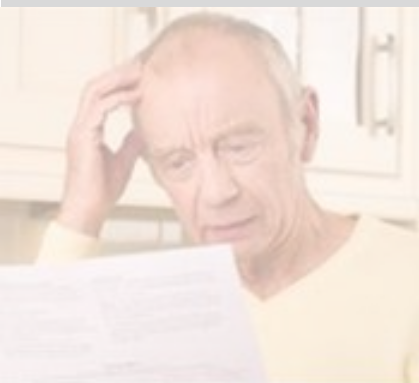
- Expect ongoing maintenance – reassuring to see in plan
- Support target of reducing service improvements

*Lead pipe replacement good... Will be good if they can reduce to 8 mins
Empty Nester, Hereford*

NHH sample

- NB lead pipes not covered with NHH sample – potentially weakening this promise
- Similar reactions from SMES however farmers (in Hereford) question implication that pollution is a farming issue

Fair bills received a reasonably strong reception, although sings that the 45-59 age range were slightly more 'cool' to this area of the plan – related to questions over the fairness of helping certain people with their bill?



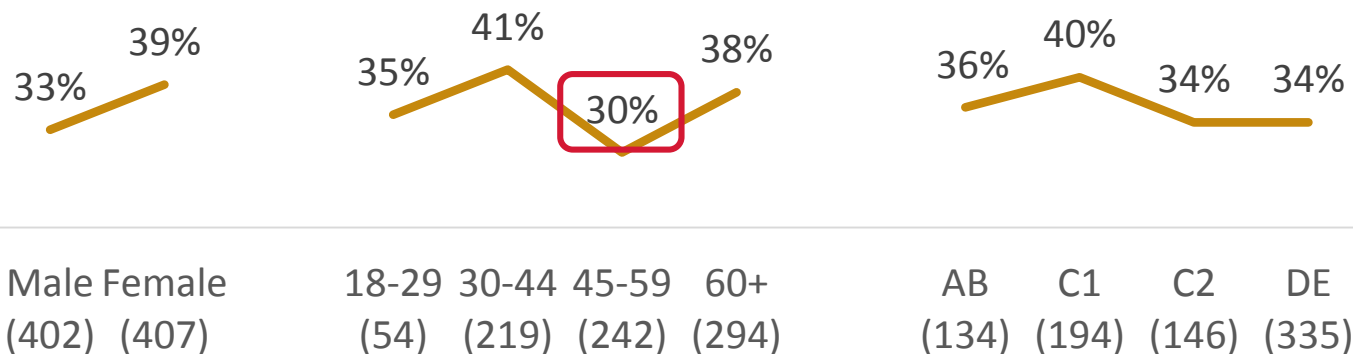
**HH 84%
Positive**

(36% - 'very positive')

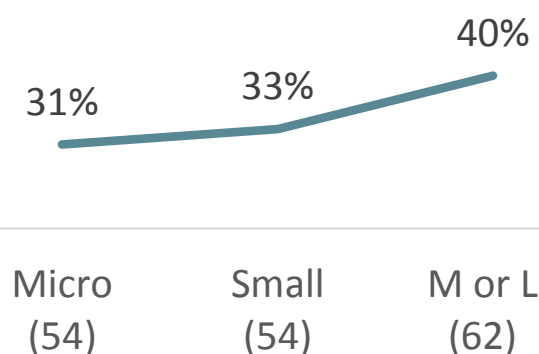
**NHH 79%
Positive**

(35% - 'very positive')

'very positive'



'very positive'



NN%

Significantly higher than other subgroups

NN%

Significantly lower than other subgroups

Q22a. <NAME OF STIMULUS>: How positive or negative do you feel about this part of the plan?

Base: Total HH (809), NHH (170)

Universal
customer
benefit equates
to broad
appeal across
groups

Positive about
DCWW
reducing costs
to pass on to
customer

Special tariff



- Overall response was positive
- Many are aware of the financial challenges that people/ families face
- Some negativity based on fairness i.e. it is not fair that some people pay less for their water

Efficiency savings

- Generally supportive of efficiency improvements
- Some question 10% target: figure sounds arbitrary
- Some assume that efficiency equates to job losses

Free water meter

- Positive: intuitively a fair way to pay for water
- Generates debate around being better off on a water meter, or not
- Minority think meters should be compulsory

NHH
sample

- Billing options seems behind the times: all other bills paid online; 'cost saving exercise'
- Water audit more relevant to larger users

*Good to help less fortunate
and those who struggle
Future, Rhyl*

*Economy is difficult at the
moment so helping the
customer is so important
Empty Nester, Hereford*

*Like innovation to reduce
costs, more info on
'struggling' payers
Pre-Family, Swansea*

*Helps customers and
improves efficiency
Family, Pembroke*

*Dislike how vague on how
they will reduce costs
Future, Aberystwyth*

It is the higher social classes who rate sustainability higher than others.



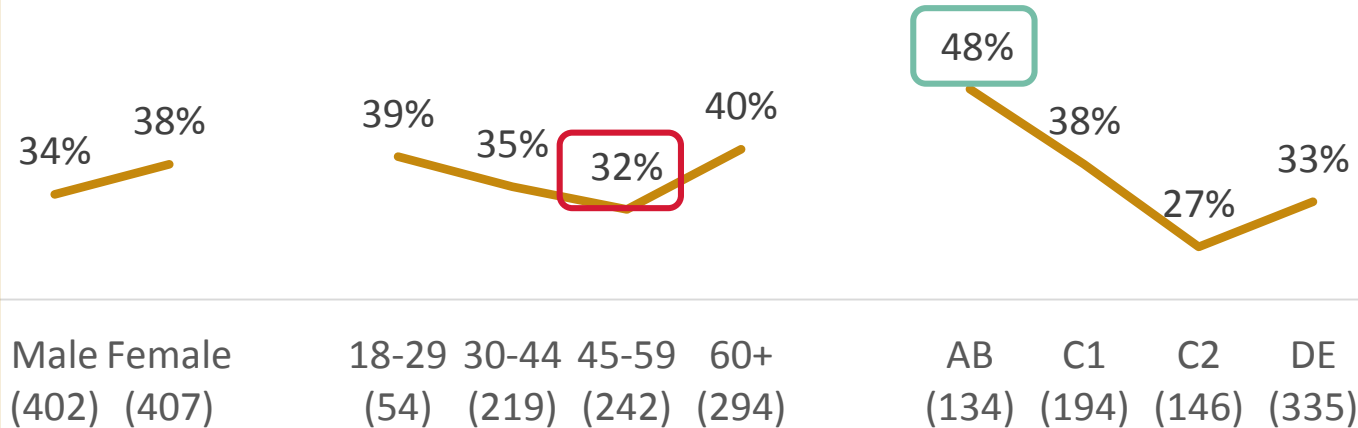
**HH 82%
Positive**

(36% - 'very positive')

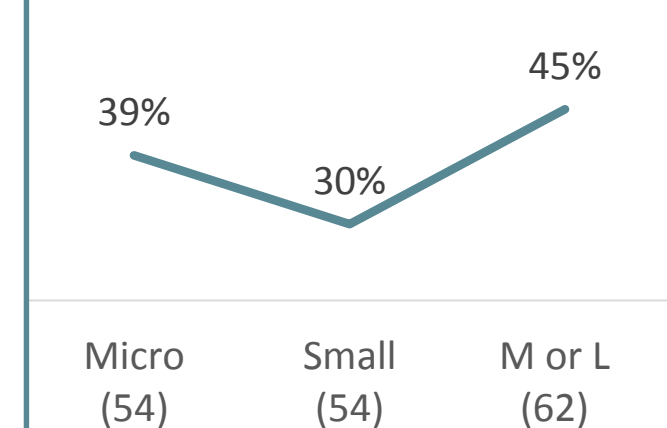
**NHH 77%
Positive**

(38% - 'very positive')

'very positive'



'very positive'



NN%

Significantly higher than other subgroups

NN%

Significantly lower than other subgroups

Q22a. <NAME OF STIMULUS>: How positive or negative do you feel about this part of the plan?

Base: Total HH (809), NHH (170)

Positive that DCWW is involved in, and working with local communities

Positivity varies depending on closeness to individuals' lives

Education programme



- Most popular - but not all see as DCWW's responsibility
- Impressed re helping to educate children: seen as investing in the future and adults will benefit as well

Good investment into schools teaching about conservation and climate change
Vulnerable, Swansea

Sponges (Rainscape)



- Support for flood reduction
- Positivity comes from the feeling that this is a simple, clever solution to a well known problem

Good aspiration to educate children which means investing in the future
Empty Nester, Aberystwyth

Visitor centres

- Some support: those who are aware of them or are supportive of education already
- For others benefit less clear esp. if unaware of them

Visitor centres are very attractive to help educate
Empty Nester, Hereford

Community projects

- Support for community project esp. for vulnerable
- Not seen as a priority investment area
- Not relevant for all: more detail needed for some

Likes; flood reducing, dislikes; recreation centres
Family, Caernarfon

Like visitor centres and community projects, especially for disadvantaged people
Vulnerable, Rhyl

NHH sample

- High approval for parts of plan relating to education and investing in next generation (responding as citizens, not businesses?)
- Community projects interest on two levels: micro businesses might benefit in their communities; larger have an affinity with CSR initiatives

Not one of the 'top tier' areas of the plan, nevertheless customers broadly positive (although a little less the 'pressed' C2 social grade. Signs that larger businesses rate this more positively – in line with corporate social responsibility ethos?



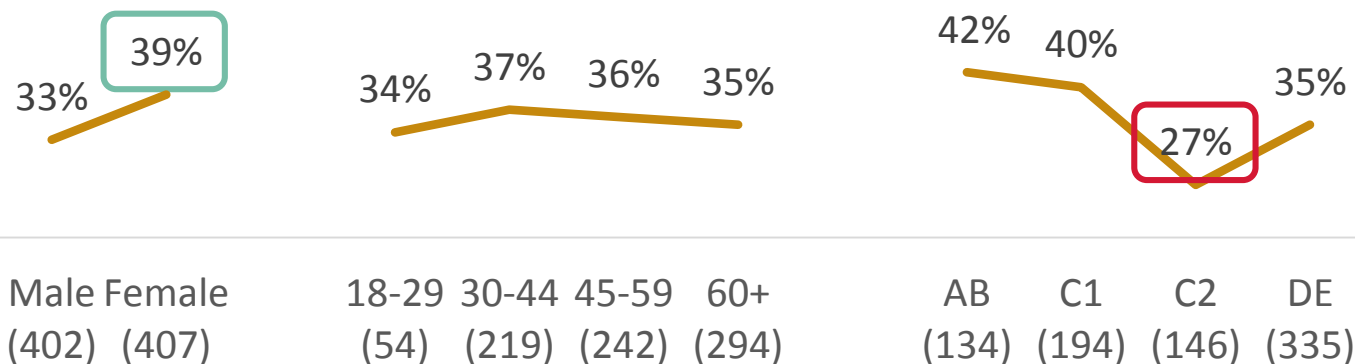
**HH 86%
Positive**

(36% - 'very positive')

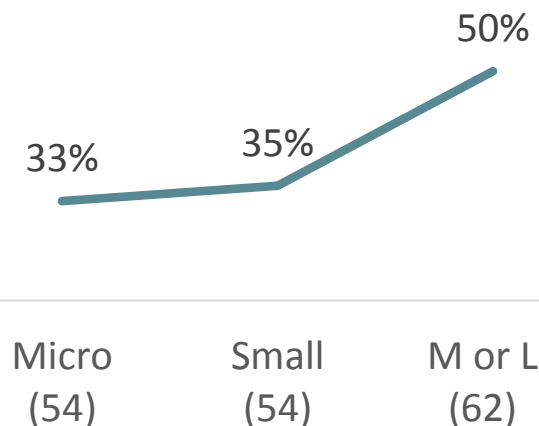
**NHH 82%
Positive**

(40% - 'very positive')

'very positive'



'very positive'



NN%

Significantly higher than other subgroups

NN%

Significantly lower than other subgroups

Q22a. <NAME OF STIMULUS>: How positive or negative do you feel about this part of the plan?

Base: Total HH (809), NHH (170)

Addressing environmental challenges seen as a priority across the sample

Therefore, impressed with DCWW's work to mitigate negative effects and develop opportunities

NHH sample

▶ Renewable energy

- Universally appealing
- Expect DCWW to do something on this and impressed with what is in the plan
- Many understand the connection with generating energy and reducing running costs

▶ Reduce overflows

- Fewer mentions of this area
- Target (200km) doesn't feel ambitious enough

▶ Pollution incidents

- Linked to reducing overflows, but more polarising
- For some target is too low: but difficult to comprehend scale of a pollution incident
- Discovering there are currently 110 pollution incidents pa seems unacceptably high (for some)
- However, a similar proportion were positive about Welsh Water reducing pollution incidents

Nothing negative, all great stuff, should be done anyway
Pre-Family, Swansea

Renewable energy is a good investment
Family, Caernarfon

Love environmental factors, great that they generate energy from it
Pre-Family, Swansea

Like improving natural water quality & making own energy. But not enough to reduce pollution incidents
Future, Aberystwyth

Pollution incidents, not much of an increase
Empty Nesters, Hereford

- Most relevant for larger NHH as focus on e.g. effluent & environment impact
- Smaller businesses respond more negatively: challenge pollution target - should be more ambitious
- Opportunity to innovate e.g. stopping plastic particles getting into water sources/sea

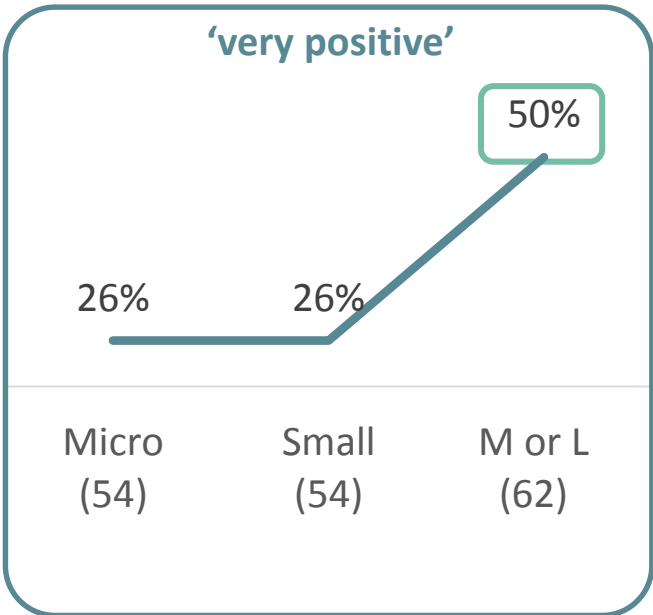
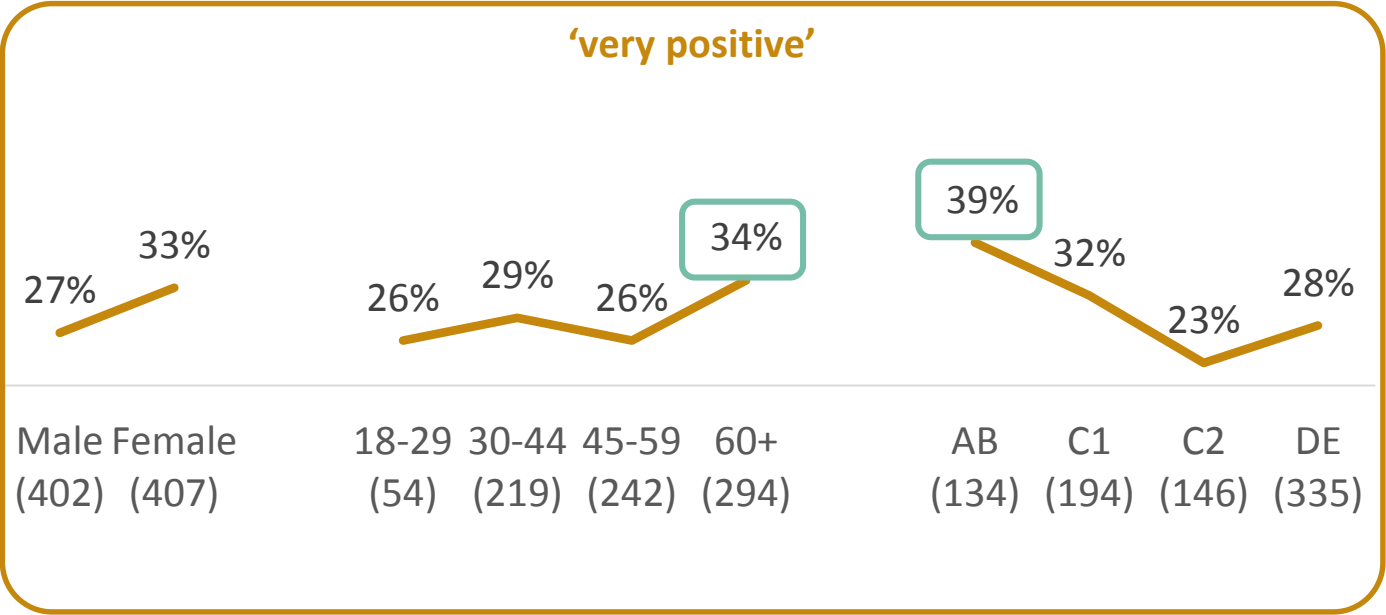
Personal approach that's right for you

The least positively endorsed of all the areas of the business plan – although larger businesses did respond to this area more positively than other groups – indicative of a more positive response to the idea of a dedicated account manager.



HH 77% Positive
(30% - 'very positive')

NHH 78% Positive
(34% - 'very positive')



NN% Significantly higher than other subgroups
NN% Significantly lower than other subgroups

Q22a. <NAME OF STIMULUS>: How positive or negative do you feel about this part of the plan?
Base: Total HH (809), NHH (170)

Although most are supportive, this is the least attractive element of the business plan

Customer service is important when needed, but overall not as relevant as other areas of the plan

Meets expectation for company size
Family, Caernarfon

NHH sample

Priority assistance



- Most popular idea – reassuring that there are processes in place to support those who need it
- For people who have not heard of this service it intuitively appeals as good service
- Many can empathise with people who might benefit from the service, either themselves (now or in future) or an elderly or disabled relative

People and digital services

- Overall, people see maintaining high customer satisfaction as an important area to focus on
- Customer service is important when you need it, but isn't something to get excited about
- People pulled out the option to speak to 'real people'

Welsh language services

- Positively mentioned by many, but is polarising - particularly in English locations, such as Hereford

Like idea of helping those who need priority water
Vulnerable, Rhyl

Like; customers who need priority assistance. Dislike; spending more on awareness of Welsh language
Empty Nester, Hereford

Real people helping not machines
Vulnerable, Swansea

Impressed by Welsh language service
Pre-Family, Pembroke

Good improving awareness of Welsh language services and assisting people on priority services
Empty Nester, Aberystwyth

- **Relationship management:** more appealing to larger businesses
- Smaller NHH more likely to want dedicated phone service and/or local contact than full account management
- Self service options good for SMEs generally

A close-up photograph of a woman with light brown hair and blue eyes, smiling slightly. She is holding a small yellow flower in her right hand, which is raised towards her face. The background is a blurred indoor setting with light-colored walls and a window. A semi-transparent teal banner is overlaid across the middle of the image, containing white text.

Detailed response – spotlight on key groups

Acceptability is high among NHH – but room for some improvement

They could keep the bill the same and be more ambitious
SME Swansea

How do HH and NHH acceptability scores compare?

- NHH give the plan slightly lower scores (informed acceptability 93% HH vs 88% NHH)

In what ways are NHH customers receiving the plan differently?

- While smaller SMEs and HH customers have similar views, businesses with higher water usage can be disappointed
 - Plan elements designed specifically for NHH tend to be most relevant to larger users/account managed
 - Desire for more help to lower costs through water efficiency – not evident in plan
- Some think plan lacks ambition: opt for more investment rather than lowering bills

Implications for DCWW

- Business segment with significant water costs (e.g. £1000+/month) see no areas of the plan that could help their cost-management

Businesses should be helped to reuse or harvest water
SME Swansea

We'd like to use less – we are being more responsible as a company
SME Swansea

If they were in competition they'd do more to help you use less
SME Swansea

Larger NHH customers are broadly more positive

How do Larger / account managed NHH acceptability scores compare to wider NHH?

- Businesses with 50+ employees give slightly higher affordability - 90% say they can comfortably afford bill impact
- Qualitatively: both rated plan 'very acceptable'

In what ways are Account Managed NHH customers receiving the plan differently?

- Broadly more positive than smaller business customers: elements such as account management services more relevant
- Close working relationship with DCWW – trust is high
- Awareness of open market in England and Scotland – sparks questioning around whether to not this will happen for Wales

*[the plan is] clear, fair and
admirable*
Account Managed NHH

Reactions to the plan in line with HH sample

All scoring the plan as acceptable / very acceptable (at an informed level)

Who was in the 'Worst Served' sample?

- 1 x low pressure
- 1 x supply interruptions and low pressure
- 1 x sewage odour
- 1 x sewage flooding

In what ways are Worst Served customers receiving the plan differently?

- Customer Promise (*Put things right if things go wrong*) has specific relevance to 'worst served' customers
- However, response to this aspect does not elicit a different or more emotive response
- This reflects wider observation that 'worst served' are generally accepting of poor service, despite on-going nature
 - For most, focus on positive customer service experience with DCWW staff, esp. on the ground staff
 - They see 250 target realistic (though hope all will be fixed in the long term)
- Critical need is for good (and more) regular communication with customers when experiencing a protracted problem

[DCWW] improving and doing better even though they are cutting the bills

The plan feels realistic and achievable

Continuous improvement is the only way

Implications for DCWW

- Continue delivering good customer service to reinforce positive attitudes amongst worst served customers

Stakeholders representing the seldom heard give strong endorsement for the plan

It's all very acceptable – can't think of anything that's missing

[most support for] getting more people on social tariffs

Community project excellent – I cover disadvantaged area

Who was in the Stakeholder sample?

- Local authority department focusing on debt management
- Charity supporting ex offenders and substance abusers
- Charity supporting people with sight loss (and often other 'vulnerabilities')
- CAB representative

In what ways are Stakeholders receiving the plan differently?

- Overall, high acceptability for a plan that does not increase bills (over and above inflation) and which supports vulnerable groups
- However: disappointment in recent changes to social tariff: discounts no longer backdated; HelpU & Watersure bill price has increased
- Strong support for elements of the plan with wider social/community angle:
 - Social tariffs and increasing vulnerable register, free fix, education programme, community investment (ideally involving the more deprived communities – but one project per year means few will benefit)
 - Free fix seen as esp. relevant for vulnerable customers – echoing HH response
 - Housing association charges tenants for repairs – free fix would be hugely supported
 - Financial barriers to calling a plumber: service removes both cost barrier – and will reduce wasted water
 - Support for DCWW to be involved in wider renewable schemes with direct benefits to customers with reduced bills
 - ODIs: exempt people on social tariffs

Implications for DCWW

- Very positive perceptions of DCWW: both social tariff options and training valued.
- However some missing areas: PSR data sharing; consistency of staff training dealing with spotting signs of vulnerability; extend awareness of ST with both customers and stakeholders

A man with a beard and a blue baseball cap stands against a brick wall. He is wearing a light blue jacket over a white t-shirt and has his arms crossed. A semi-transparent teal banner is overlaid across the middle of the image, containing the text "Response to ODIs".

Response to ODIs

Qualitative
sample
evaluated ODIs
giving
acceptability
score for
£10/2% range
of price
variation

Why could the average bill be higher or lower than predicted in the business plan?

Rewards and Penalties

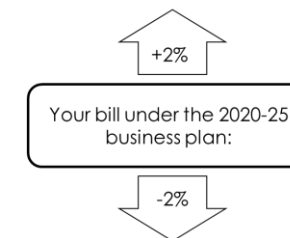
- Ofwat, the Regulator, approves service targets for each water company – and they make sure these are ambitious targets, not easily achievable ones
- So if Welsh Water outperform against targets such as reducing leakage, they are entitled to a financial reward
- The reward is paid through customer bills: exceeding targets will mean customer bills rise slightly to cover the financial reward
- The opposite is also true: if Welsh Water perform below their targets they are penalised, meaning customers would pay slightly lower bills

Because Welsh Water performs well or badly against its targets, the actual bill could be **£10** higher or lower than predicted in the business plan



Household
39/74
acceptable/very
acceptable

Because Welsh Water performs well or badly against its targets, the actual bill could be **2%** higher or lower than predicted in the business plan



**Non Household
(SME)**
8/12 acceptable/
very acceptable

Vulnerable and Family life stages least happy with ODI proposition

Plan acceptability drops markedly once ODIs are introduced

For most, the problem lies with the principle rather than the bill price range itself

- Norm = companies improve for the benefit of customers...
- Incentive model appears to contradict the intuitive idea that quality service leads to customer satisfaction and therefore growth (or profit): here the customer is penalised
- Many see it as unacceptable that the financial bonus is paid for by customers: assume it will benefit senior managers via bonuses
- Contradicts NFP model where excess 'profit' is returned to customers

Some more sympathetic to the principle

- Comfort that the regulator is driving performance...
- Agree more readily with discount for poor service (i.e. not paying over the odds for shoddy performance)
- Should be able to forecast accurately to meet targets

£10/2% variation less troubling than the regulatory mechanism underpinning it

- £10 fluctuation; want to know where I stand
- £10 is a more significant increase than the base case bill proposal
- Can't really see the value of paying more for exceeding targets (reflects general satisfaction with the targets within the plan)

**Verbatim
reflects how
perplexing
customers find
ODI proposals**

Stupid
Pre-family, Pembroke

Seems a quirky rule
Family, Caernarfon

This is very weird
Pre-family, Swansea

*Why should we pay for
their bonus*
Family, Pembroke

*What's the point when
they are all not for profit?*
Vulnerable, Swansea,
Older,

*From a customer point of view it is
quite good that if you are not
getting the service you pay less for it.*
Family, Caernarfon

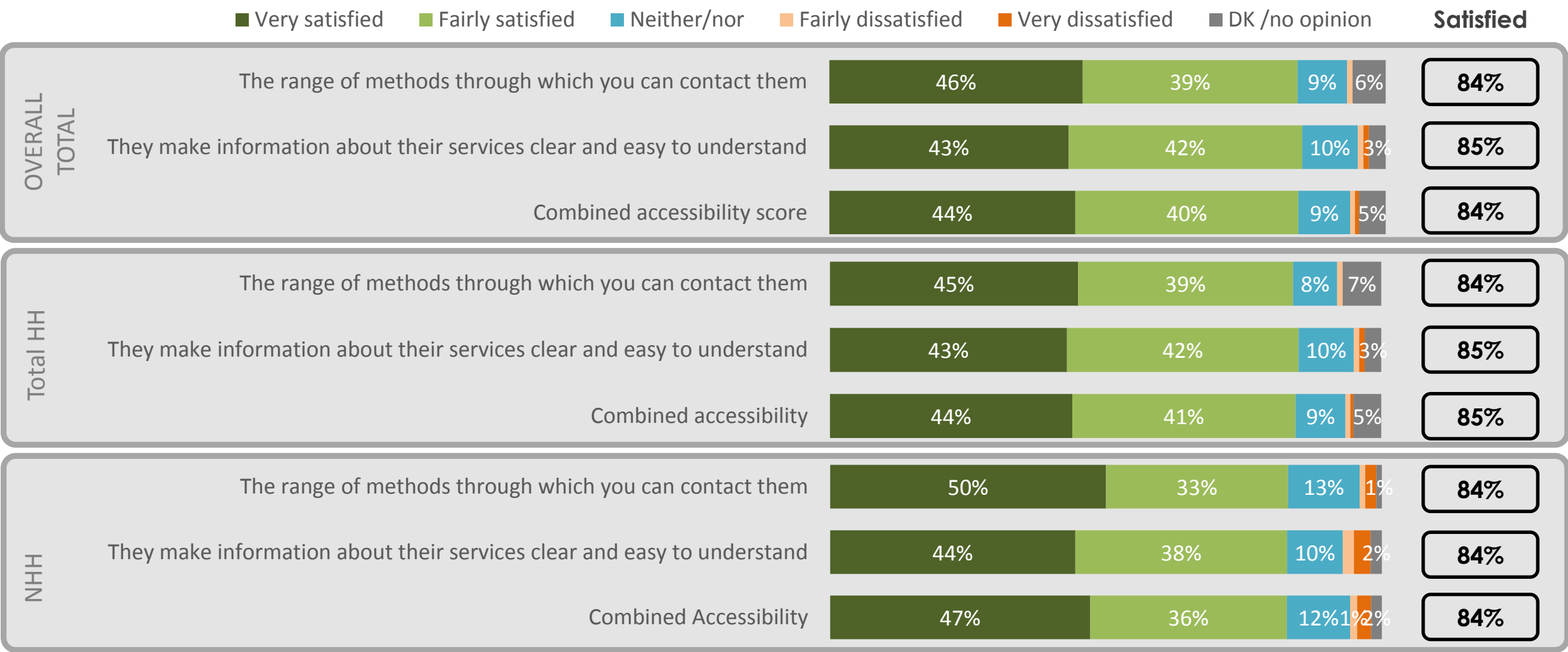
*It's a bit backwards
really.*
Future, Rhyl

*I think it is crazy; it is not
fair on customers.*
Pre-family, Pembroke

A photograph of two elderly women with white hair, smiling and looking towards the camera. The woman on the left is wearing a maroon and black striped sweater and has a brown strap over her shoulder. The woman on the right is wearing a blue patterned scarf and a light blue top. A semi-transparent teal banner is overlaid across the middle of the image, containing the text "Accessibility and Assistance" in white.

Accessibility and Assistance

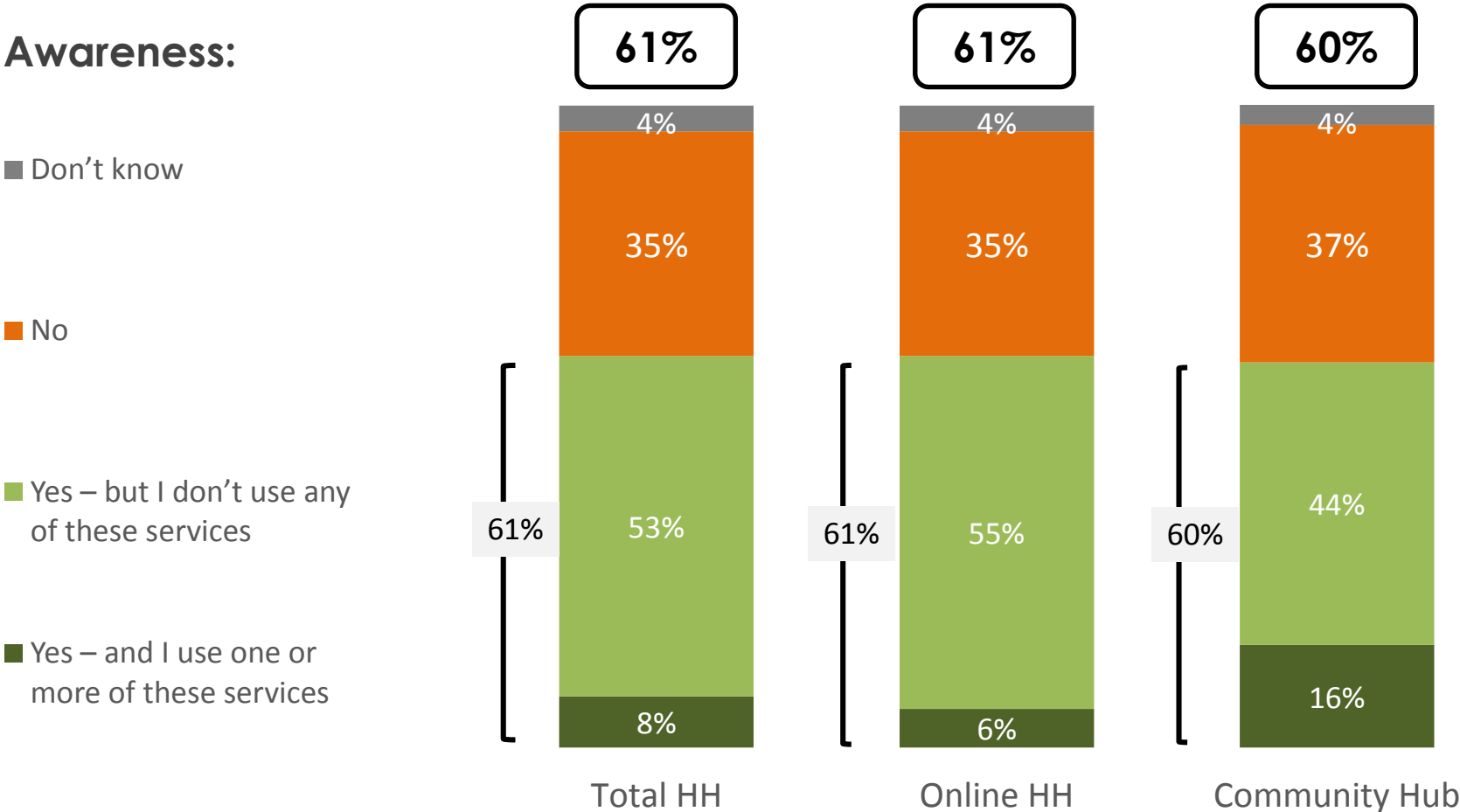
The majority of both household and non-household customers are satisfied with both elements of ‘accessibility’ (range of methods of access and clarity of information). This results in a combined accessibility score (the average of both elements) of over 80% for both audiences.



Q32. Now moving away from the business plan, and thinking more generally: How would you rate Welsh Water’s performance in the following areas?

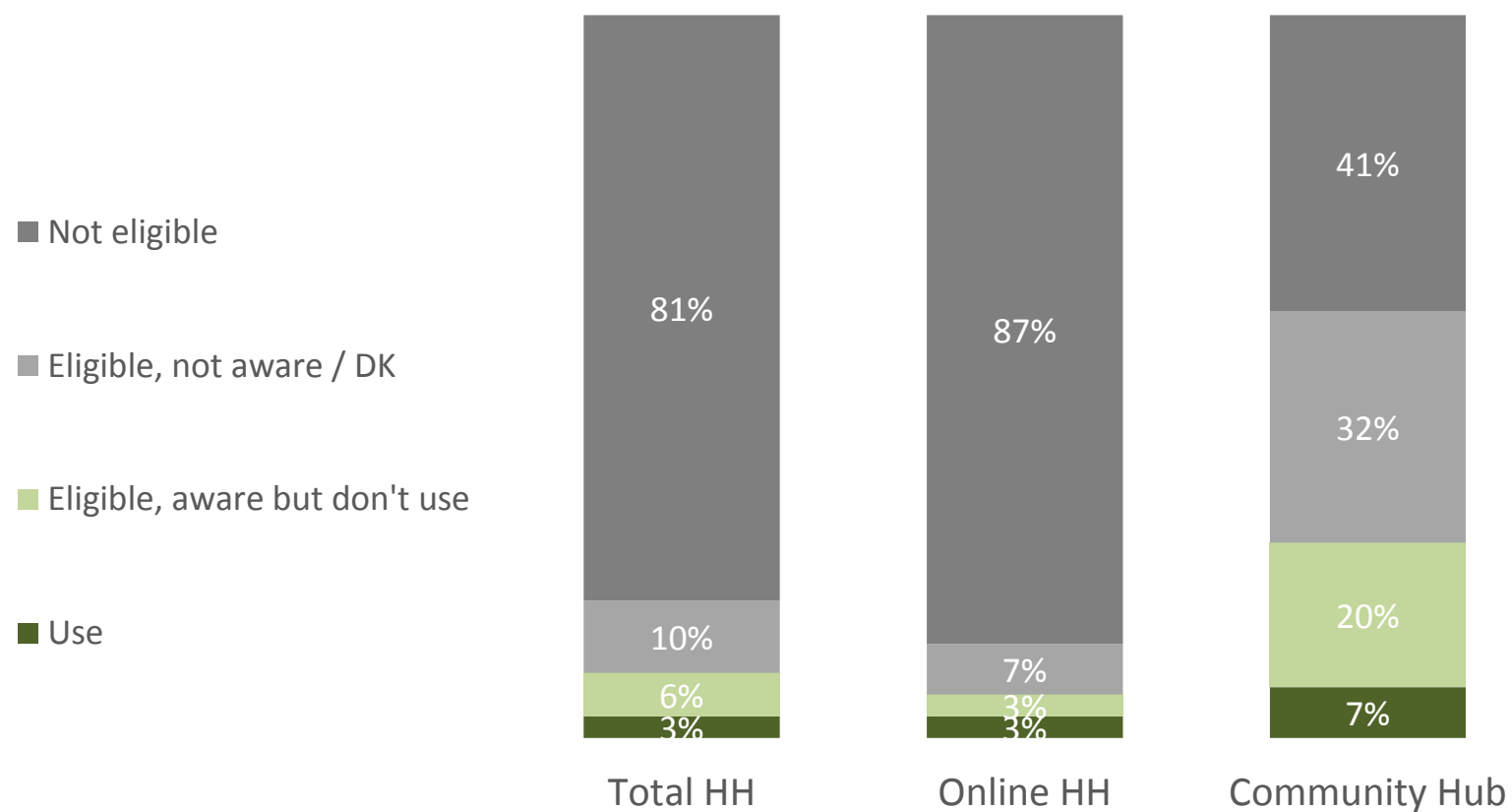
Base: OVERALL TOTAL (979), Total HH (809), NHH (170)

6 out of 10 households claim to have heard about Welsh Water's assistance services. Claimed use of the services is higher amongst the 'seldom heard' customers interviewed in the Community Hub research (16% versus 6% of the general household customer base).



Q33. Are you aware of the assistance services offered by Welsh Water for customers with particular needs?
Base: OVERALL TOTAL (809), Total HH (809), Online HH (600), Community Hub (209)

A high proportion of the seldom heard customer group (Community Hub) are eligible for the special tariff, but only a minority are claiming to use it; is there scope to fulfil this more widely amongst those who are eligible?



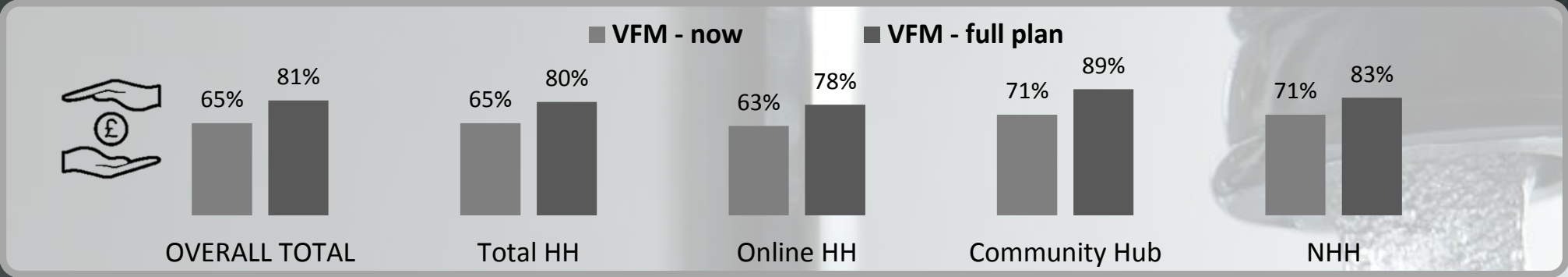
Q34. Are you on a special lower water tariff for customers with lower income who struggle to pay their water bill (for example the HelpU tariff)?

Base: Those who shared their household income - Total HH (704), Online HH (560), Community Hub (144)

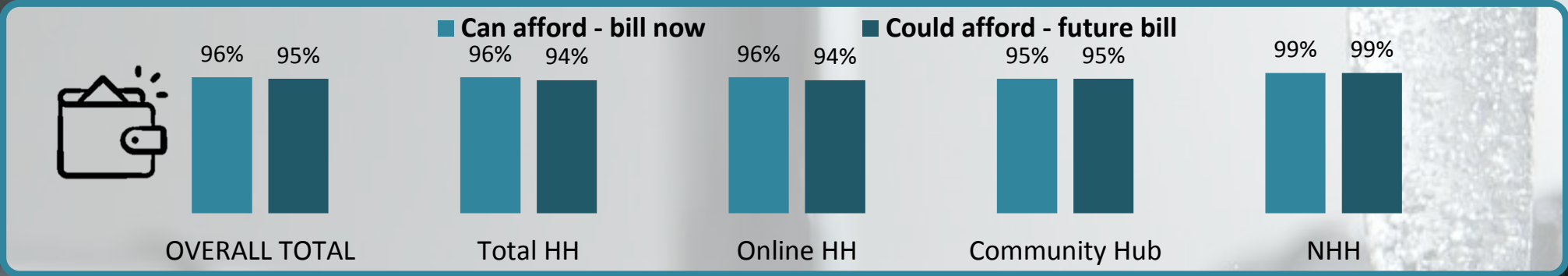


Summary and Conclusions

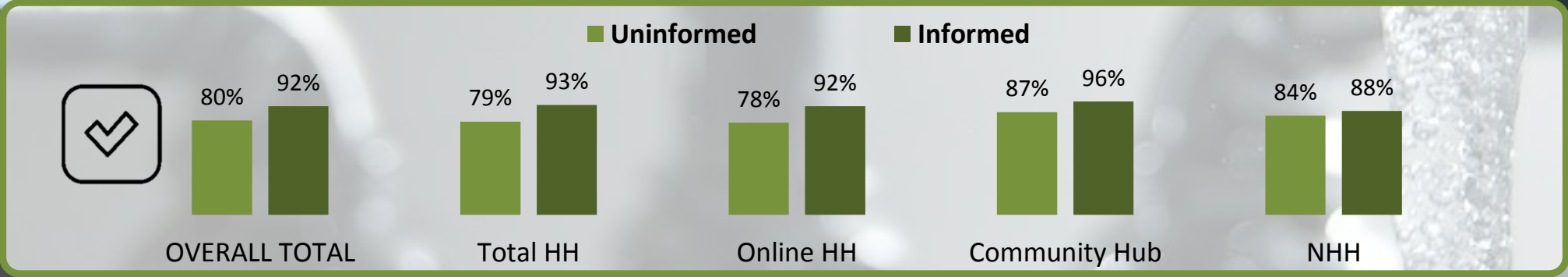
Value for money



Can afford



Acceptability



Overall a positive response to the proposed business plan

The core premise of more investment possible through improved efficiency is largely applauded

Not for profit status and good customer experience can contribute to underlying positivity and trust that in turn helps acceptance

Some nuance in how customers interpret inflation and what will happen to the bill – although most feel it will be affordable

Those who struggle to afford their bill are a group to consider carefully; any nominal bill increase could be pivotal for them

The initiatives within the plan are broadly endorsed, seen as 'necessary' 'worthwhile', and – generally speaking – fair

Evidence of some genuine 'surprise and delight' value in some areas e.g. 'free fix', 'energy generation'

The ODI bill range lessens acceptability; more a reflection of the perplexing nature of the ODI mechanism than the size of the bill impact

PR19 Acceptability

Final phase of research: Full report
9th July 2018





Appendix – Additional Analysis

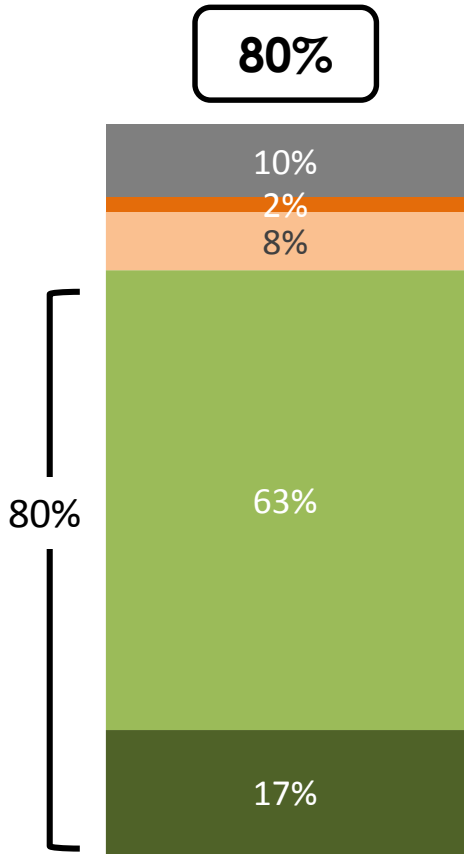
Overall acceptability scores | All customers (Household and Non-household) 67

Amongst **all customers** (combining the online household sample, the Community Hub sample and the non-household sample) uninformed acceptability is **80%**. After being informed, acceptability rises to **92%**.



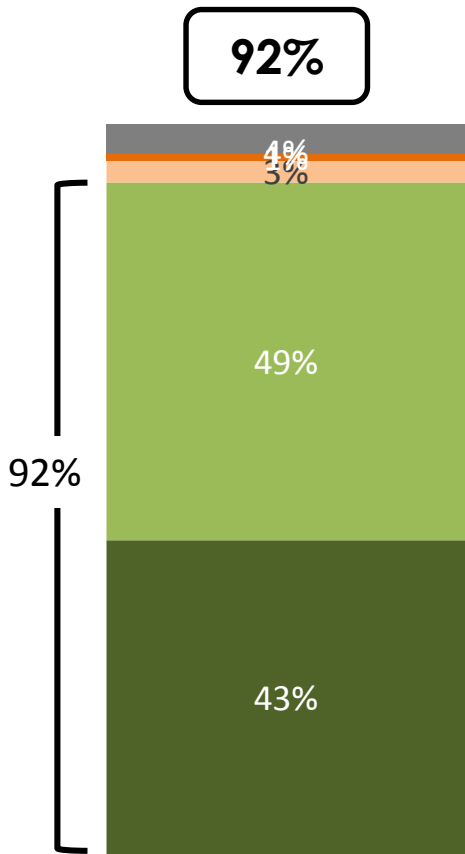
- Don't know
- Completely unacceptable
- Unacceptable
- Acceptable
- Very acceptable

Uninformed acceptability:



Q18 What is your immediate reaction to this proposal and what the bill would be?
Base: All HH, Community Hub and NHH respondents (979)

Informed acceptability:



Q24.Thinking of everything we have shown you about the plan, including the investments, service improvements, and the bill reduction (before inflation), how acceptable or unacceptable do you think the proposed plan is?
Base: All HH, Community Hub and NHH respondents (979)

Very acceptable

I think they do a good service and I am happy with them
Household

I am happy to go along with anything you think will be beneficial as I trust Welsh Water.
Seldom Heard

To have a real life price decrease is exceptional in todays world.
Non-household

It's not greatly different to the current price scheme
Non-household

Cost is virtually the same
Household

It seems reasonable compared with other services
Seldom Heard

Everything goes up and they need the money to make sure the sewages and water is safe
Household

It appears that they are trying to keep the costs low despite the expected improvements which I feel is very customer focused.
Seldom Heard

The service we get at the moment is good and we are aware infrastructure investment is needed so the increase is acceptable as long as the service remains as good and improves as a result.
Non-household

Small increase year on year
Household

A decrease in the price before inflation is very welcome.
Household

Great that it might go down but inflation happens....
Household

Because Dwr Cymru give value for money and are a non-profit company so I trust them.
Household

Makes it easier to see the services and where they are making changes for the better, I like to know about my water then I am not so annoyed if they raise or lower prices as I can understand why.
Non-household

Acceptable

Clean water and maintenance of water and sewage pipes is essential
Household

Everything else is going up so why shouldn't this....oh only my wages aren't
Household

Just seems fair
Household

I don't understand the reasoning behind it but the new price is lower than today's price so it's great to me
Household

Everything goes up, this seems just about acceptable to maintain the best water
Household

Price increase not too high but they've tried to claim they're not putting the prices up
Household

Everything seems to be going up on a regular basis except wages, so what choice do we have
Household

Have to look to the future
Household

Just about afford it
Seldom heard

Compared to energy companies this is very fair
Household

I just manage to pay my bill but to have safe clean water is a must
Seldom heard

If they really need to update the system to improve the water quality and reduce leaks I suppose we as customers have to pay.
Household

Never had a problem with our water and the service is good, it's expensive everywhere
Household

Fair price for services provided
Non-household

I find they deliver a good service so I trust their plans
Non-household

Welsh Water is not for profit so as long as that stays the same I am happy.
Household

Water is essential & it's not much of an increase
Seldom heard

Reasonable rate of increase.
Below inflation
Non-household

It's not increasing my bill massively
Seldom heard

They are trying to keep prices down to a manageable level.
Seldom heard

It is important to invest in the future
Non-household

As long as they are transparent and honest. This change seems in line with all other sectors who are struggling to make ends meet
Non-household

(Completely) unacceptable

I pay enough already, after all it's only sky juice and you don't pay for it.
Household

Inflation has been virtually non-existent for many years as a result of austerity measures, yet water charges have continued to rise. this plan indicates that water prices will rise with inflation estimated at 2%. so, I would like to know if inflation has been 0% give or take -0.5% - 0.5%, how on earth can they have kept increasing my prices!
Household

Because they are not giving the service that they say they do and our rivers are a total mess.
Household

It's supposed to be a non profit company but the water and sewerage charges are really high. I pay the same amount a month as a single person as a friend in England who has 6 people in her home
Household

Chief exec of welsh water was paid £768,000 a year -if they can afford that they can afford to supply water at the rate they do now- repair all the leaks to save water - not tell us we must pay more
Household

We are frequently cut off and being at the end of the mains water supply, when restored we have poor water quality for up to three days later
Household

It is hard to pay it now
Seldom heard

They have excessive water and profits already too many greedy share holders
Non-household

You are suggesting a link to inflation at 1.6% when most people don't get any pay rise - never mind one linked to inflation.
Household

I live on benefits due to long term health problems and am struggling at the moment to make ends meet, if the water bill goes up I'm not sure I could afford it
Household

Reductions should be more since prices have risen above inflation regularly for the last 10 years (approx yearly increase 4% on average)
Non-household

Expensive already
Non-household

Water rates are too high in Wales and they should be brought down. Considering we are rich in Water why should Wales pay more?
Non-household

Very acceptable

Keeping the water safe to drink. Renewing the old water pipes can only be good. Helping genuine people who cannot afford there water
Household

If the plan works out, the company will continue to improve its services whilst reducing its bills to the customer, how can you say anything else but acceptable?
Household

Even if the bill rises for each customer, the business plan is very clear and efficient. It targets the right areas to invest money. I am happy to pay more to see this vision succeed in this timeframe.
Household

it seems like a really good plan
Household

Those who can afford it will help others.
Seldom Heard

They're doing a lot for the customer and the future and inflation isn't in their control
Household

It is important to protect our natural resources, including water, and Welsh Water have set out a very good plan to protect this resource for the future.
Household

Lowering internal costs by becoming more efficient and passing savings to customers .
Non-household

Because, as a not for profits company, I will be getting back what I put in. So it's a win win situation.
Household

It is fairer than what works presently, any improvement is very welcomed.
Household

To reduce bills by 5% by improving efficiencies and technology is a blueprint that all Companies should aspire to.
Non-household

Replacing lead pipes free would be good, also fixing leaks and dripping taps.
Seldom Heard

The increases are not too great.
Seldom Heard

Because they are thinking of all people like the one that struggle to pay there bills they will help them from the profits, so at least those people can live a little better knowing they will have some help.
Household

You may have cheaper water bills. It may help people like me who can't pay my bills. Trying to update the old pipes. Trying to reduce environmental impact..
Seldom Heard

I think reducing time people are without water is very good. It is a good aim. I'm all for investment to help with floods, pipes and sewage.
Non-household

Acceptable

Price is good and policies I can completely get behind
Household

Not going up too much and work that is needed is being done
Household

Because they are doing a lot to help run things properly in the long run and helping families
Household

Looks all good in writing but will it actually happen
Household

It seems OK
Household

Seems fair
Household

Seems fair with all the work behind the scenes
Household

I find the commitment of Welsh Water positive in the hope that it will maintain the commitment not to increase the water fare
Household

It's a lot of things that I thought the company did already, however the new initiatives are very positive.
Seldom Heard

Many projects. that are very worthwhile and I can see that Welsh Water is trying to minimise cost increases by hopefully reducing their own costs
Household

Think the improvements are focusing on the environment and helping people.
Seldom Heard

It's affordable , and the works are necessary , and the poorest need the help,
Household

Welsh water need to do this increasing the bills slightly is part of it.
Household

It is giving back by investing customers money into an all round better service.
Household

At least you are not a rip-off private utility company
Non-household

They will continue to be not for profit, they will improve their services and will in effect reduce their costs
Household

I like that you are reducing your operating costs by finding efficiency savings. And that you are helping those most in need.
Household

Seems a fair plan and some savings for investing in the future of welsh water products.
Non-household

It is cheaper and more efficient, we need some progressive change if we are going to supply the demand of the future and this will help increase supplies. My water is already very cheap so I am happy the prices are dropping and efficiency increasing. They always fix faults fast and give exact times, always impressed so any more improvement is just amazing.
Non-household

(Completely) unacceptable

We shouldn't have to pay for your mistakes.
Household

Getting expensive.
Household

There's not much of a reduction.
Household

Investment is fine but other things won't work people just want the cost of their bills to be reduced. There is no competition for welsh water so they can charge what they like.
Household

Need to cut out waste and improve efficiency as a priority. Vanity projects can wait.
Household

not for profit' that's a joke.
Household

You need to cut out the fluffy community based things that you are doing for 'free' - you are not a charity we choose to donate money to, you are providing a service and charging us above the odds to deliver things which are not part of that core contract.
Household

Thames Water is cheaper than Welsh Water - how can that be possible when Wales is so much in Water? Yes there is a bigger network in Wales but WW must work harder to improve efficiency.
Non-household

They have made enough profit out of customers for decades, time to pay back now. And if they need billions of pounds for investment, they can start claiming grants. Oh, I forgot, Wales stupidly voted for the UK to leave the EU and now EU grants will not be forthcoming. I suggest Welsh Water gets a grant claim in instantly before it really is too late - or else start demanding publicly that we remain in the EU.
Household

To expensive for me for people with low income.
Seldom heard

You've had more than enough profit already.
Non-household

I still think that the overall reduction in bills should be significantly greater than 5%.
Non-household

There are no specifics here just a PR exercise. It actually promises very little given the number of years involved. Just saying 'we aim' or we will look to etc holds Welsh Water to nothing.
Non-household

Appendix - Stimulus

A scenic landscape featuring a large body of water (a lake or reservoir) in the middle ground. In the foreground, a grassy field is where a group of people are gathered around a wooden picnic table. A dog is also present near the table. To the right of the table, there is a red trash bin with the 'WALL'S' logo. The background consists of rolling green hills under a sky filled with large, white, fluffy clouds. A semi-transparent teal banner is overlaid across the middle of the image, containing the text 'Appendix - Stimulus'.

Household

Clean, safe water for all

 Improving performance / increasing investment
  Maintaining
  New initiative



Reduce leakage through better detection and pipe replacement: cutting leakage by 15%



Over the years Welsh Water has reduced leakage significantly. It's increasingly hard to reduce because the leaks become harder to find. Innovation will help reduce the amount of all water leaked from 20% to 17% (a cut of 15% as a proportion of what it is now).



Programme to replace lead pipes for 7,000 affected homes – at no cost to those customers



Lead water pipes owned by customers in or near the home can be bad for health. Although Welsh Water does not own these pipes, it will help to replace them and achieve the Welsh Government's goal of a 'lead free Wales' over the long-term.



Pipe replacement programme to reduce bursts and cases of 'no water' by 30%



On average, burst pipes currently cause customers to lose supply for 16 minutes per year – this is the way the industry measures its performance. The business plan will reduce this measure to 8 minutes in 2025.



Continue to invest in water quality to maintain 99.99% score



Welsh Water will work with farmers and landowners to protect water sources from the growing threats of pesticides and other pollutants.

Non-household

Clean, safe water for all

 Improving performance / increasing investment
  Maintaining
  New initiative



Reduce leakage through better detection and pipe replacement: cutting leakage by 15%



Over the years Welsh Water has reduced leakage significantly. It's increasingly hard to reduce because the leaks become harder to find. Welsh Water will help businesses reduce water consumption (including leaks) which will help reduce bills.



Continue to invest in water quality to maintain 99.99% score



Welsh Water will work with farmers and landowners to protect water sources from the growing threats of pesticides and other pollutants.



Average number of minutes customers are without water reduced from 16 to 8 minutes by 2025



On average, burst pipes currently cause customers to lose supply for 16 minutes per year – this is the way the industry measures its performance. The business plan will reduce this measure to 8 minutes in 2025.

Household

Safeguard the environment for future generations

 Improving performance / increasing investment
  Maintaining
  New initiative



Investment to reduce wastewater spills and overflows in wet weather – improving the water quality of over 200km of rivers



Welsh Water works with Natural Resources Wales to reduce overflows from sewerage and drainage systems. Their plan will improve the official water quality of 200km of rivers.



By 2025 Welsh Water will produce a third of their own energy needs from sewage treatment and other activities to reduce running costs and help the environment



Welsh Water will increase the energy they generate from treatment of sewage and from their wind turbines and solar panels. They use this energy to reduce their costs.



Reducing the number of pollution incidents caused by things going wrong - from 110 to 90 a year



Unexpected releases of sewage happen when there are failures at treatment works or overflows from the sewerage network after heavy rain. These will be reduced through better maintenance, smarter monitoring systems, and increasing capacity.

Non-household

Safeguard the environment for future generations

 Improving performance / increasing investment
  Maintaining
  New initiative



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Welsh Water will increase the energy they generate from treatment of sewage and from their wind turbines and solar panels. They use this energy to reduce their costs.



Reducing the number of pollution incidents caused by things going wrong - from 110 to 90 a year



Incidents will be reduced through better maintenance and monitoring, and increasing capacity. Increased capacity will also allow new growth and development. Welsh Water will also help businesses manage their effluent discharge to improve environmental quality.

Household

Put things right if things go wrong

 Improving performance / increasing investment
  Maintaining
  New initiative



Permanently fixing repeated service problems such as low pressure for 250 of the 1,500 homes who suffer them

Around 1,500 homes (0.1% of customers) receive poor service (low pressure, or a high ongoing risk of sewer flooding) because fixing the issue where they are would be very expensive. Welsh Water will reduce this number by 250 and not charge customers who suffer this unacceptable service.



Investing to protect treatment works and networks from the effects of severe weather

Welsh Water will invest in their critical water and sewerage treatment works to help them withstand extreme conditions and prevent service failure. This might be adding back up energy generation capability, or increasing on-site storage of treatment chemicals.



Offering free fix service to stop leaking taps and toilets which will reduce water usage and save customers money

A great deal of water is lost through taps leaking or toilets continually running due to a malfunction. This is a waste of water, and can add to customer bills if they are metered. Welsh Water will launch a service to fix these for free.



Non-household

Put things right if things go wrong

 Improving performance / increasing investment
  Maintaining
  New initiative



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A great deal of water is lost through taps leaking or toilets continually running due to a malfunction. This is a waste of water, and can add to customer bills if they are metered. Welsh Water will launch a service to fix these for free.



Welsh Water will not charge customers who suffer an unacceptable level of service, such as a sewer flooding or repeated low pressure

Welsh Water will provide compensation for customers who suffer an unacceptable service failure such as repeated flooding in their premises.



Household

Fair bills for everyone

 Improving performance / increasing investment
  Maintaining
  New initiative



Welsh Water will help more customers who struggle to pay their bills, by putting them on a special lower tariff if they are genuinely in need



Welsh Water's lower tariffs help those who struggle to pay, and improve their overall collection rate. Because Welsh Water have no shareholders, they use some of their profits to do this. Welsh Water will increase the number of customers helped from around 100,000 to 150,000.



Welsh Water will reduce running costs and improve efficiency by around 10%



Welsh Water will keep finding better ways of doing more for less, including investing in research and innovation, to reduce their running costs. Because they are not for profit, all savings are passed through directly to customers. Welsh Water will achieve efficiency savings of around 10% over 2020 to 2025.



Welsh Water will help customers to save money by reducing water consumption, and offer them a free meter where it would help them to spend less



Every year Welsh Water will continue to install free meters for thousands of customers who choose to have one, so they only pay for what they use. Welsh Water will continue to provide free water efficiency advice to help customers save money and reduce consumption by about 5%.

Non-household

Fair bills for everyone

 Improving performance / increasing investment
  Maintaining
  New initiative



Deliver electronic billing for all business customers that want this facility



This will provide all customers the ability to receive electronic billing and provide increased self-service options to suit customer requirements.



Welsh Water will reduce running costs and improve efficiency by around 10%



Welsh Water will keep finding better ways of doing more for less, including investing in research and innovation, to reduce their running costs. Because they are not for profit, all savings are passed through directly to customers. Welsh Water will achieve efficiency savings of around 10% over 2020 to 2025.



Welsh Water will help customers to save money by reducing water consumption or effectively monitoring usage



Welsh Water will continue to provide water efficiency advice to help customers save money including the Water Audit service received by business customers. Welsh Water will continue to grow the range of services in line with business customers' requirements including smart metering.

Household

More sustainable & prosperous future for communities

 Improving performance / increasing investment
  Maintaining
  New initiative



Expanding education programmes to teach children about water conservation and climate change



Welsh Water will increase the numbers of children benefitting from educational programmes from 67,000 to 75,000 per year.



Reducing flooding in built up areas when heavy rain overwhelms sewers



Heavy rainfall can cause sewers to overflow, causing flooding in built up areas where drains are under most pressure. Welsh Water will develop more green areas to act as 'sponges' in residential areas to ease pressure on sewers.



Investing in visitor and recreation centres to allow more customers to enjoy the natural environment and learn about what Welsh Water do



Welsh Water plan to increase the numbers who use their visitor centres from 570,000 to 830,000 visits per year. They will open a major new visitor centre in South Wales and make improvements to existing ones in North, Mid and West Wales.



Investing in community projects to meet wider community needs



Welsh Water will invest in at least one major project per year for the most disadvantaged communities Welsh Water serve. The projects directly involve the communities to ensure significant and long-term benefit.

Non-household

More sustainable & prosperous future for communities

 Improving performance / increasing investment
  Maintaining
  New initiative



Expanding education programmes to teach children about water conservation and climate change



Welsh Water will increase the numbers of children benefitting from educational programmes from 67,000 to 75,000 per year.



Reducing flooding in built up areas when heavy rain overwhelms sewers



Heavy rainfall can cause sewers to overflow, causing flooding in built up areas. Welsh Water will work with businesses and developers to stop surface water entering waste water systems. This will reduce the amount of water in sewers and the likelihood of flooding.



Investing in community projects to meet wider community needs



Welsh Water will invest in at least one major project per year for the most disadvantaged communities Welsh Water serve. The projects directly involve the communities to ensure significant and long-term benefit.

Household

Personal approach that's right for you

 Improving performance / increasing investment
  Maintaining
  New initiative



Helping more customers who need priority assistance when things go wrong

Welsh Water provide services to meet particular customer needs, such as braille bills. They also keep a register of who needs priority bottled water when there are supply interruptions. They will do more to reach customers in need, roughly doubling the number on their registers.



Investing in their people and digital services to maintain high customer satisfaction and ensuring you can reach a real person on the phone

Welsh Water will continue to give a choice of how to contact them: on the web, by phone (to a contact centre in Wales), or by post. They will make sure they continue to beat the rest of the industry on customer satisfaction and trust scores.



Increasing customer awareness of Welsh language services

Welsh Water offer the option for customers to contact them and receive information in Welsh. Welsh Water will do more to make sure customers are aware of this, and expect to increase the number of customers registering for their Welsh language services.

Non-household

Personal approach that's right for you

 Improving performance / increasing investment
  Maintaining
  New initiative



Significantly improved digital offering and self-serve opportunities for developers and business customers

Customers now expect to be able to do things like booking appointments online, and tracking deliveries and visits. Welsh Water will invest in new services to allow customers to do this when they need a visit from an engineer.



Expanding relationship management capability

Welsh Water will expand their capability to support business customers who request a relationship management service. This will include the availability of additional services and products desired by customers that complement Welsh Water's core activities.



Investing in their people and digital services to maintain high customer satisfaction and ensuring you can reach a real person on the phone

Welsh Water measure customer satisfaction and trust through regular surveys. They will continue to give customers the choice of how they contact them, and make sure they continue to beat the rest of the industry on these scores.