



Dŵr Cymru  
Welsh Water

# Welsh Water 2050: customer response to long term strategy

Research debrief



10<sup>th</sup> July 2017

## Objectives: to provide insight from the uninformed customer perspective

- What existing expectations do customers have of DCWW in planning for the future?
- Do customers agree with the 14 strategic responses that DCWW has set out in its Water 2050 strategy?
- How do customers prioritise the 14 strategic responses within Water 2050?
- In principle, to what extent are customers willing to pay for the investment required to meet the strategic responses?
- In principle, how willing are customers as a whole prepared to support investments that will improve service for the few (i.e. worst served customers)?

## Methodology and sample

### 9 x 3 hour extended groups

- 3 x AB household customers
- 3 x C1C2 household customers
- 3 x DE household customers

### VULNERABLE SAMPLE x 5 paired depths (1 per location)

- Communication: cognition; literacy
- Connectivity: no internet, rural
- Circumstance: bereavement; disability; service failures



*Fieldwork: w/c 29<sup>th</sup> May -  
w/c 12<sup>th</sup> June 2017*

***Total number of  
customers  
participated: 108***



**Bangor: registered disabled man in 30s living independently.** Interviewed with friend

- Student, in Bangor to do an MA 10 years after first degree; never had steady work
- Low/no income, single, requires learning support

**Pembroke: married, wheelchair-bound, living in social housing.**

- Low income, registered as special assistance for water (following kidney transplant)
- Experienced significant service failure: sewer leakage; water stoppages

**Swansea: disabled man living independently.**

- Lives alone - dependent on his mother (carer)
- Brain haemorrhage. Registered blind, now unable to read/write significant cognitive impairments and epilepsy



*All 'hard to reach' customers who would be neither willing/able to attend research group*

**Hereford: farmer with smallholding, 70s**

- Interviewed with neighbour (carer)
- Low income, registered disabled (hearing loss), living alone, never learned to read or write, no internet

**Cardiff: recently bereaved female** (however this has not impacted domestic circumstances). Interviewed with mother

- Low income, single, living alone



**What is the customer context  
when evaluating Water 2050?**

# Customer context | what are customers drawing on when considering Water 2050?

5

Majority		Minority
Trouble-free service	↔	Experienced service interruptions: most solved satisfactorily
Good quality (Welsh) water	↔	Specific criticisms: inefficiencies; untreated sewage to sea
Limited appreciation of all a water company does	↔	Personal or professional insight e.g. engineering or environmental remit
Bill levels not seen as too high (esp. when compared to other utilities)	↔	Aware DCWW bills higher than average and/or bills seen as high
Take information given as part of research at face value	↔	Some see contradictions with existing views (ABs more questioning)
Unaware of NFP status	↔	Spontaneously aware of NFP status

*Majority of customers are coming from a positive start point when evaluating Water 2050?*

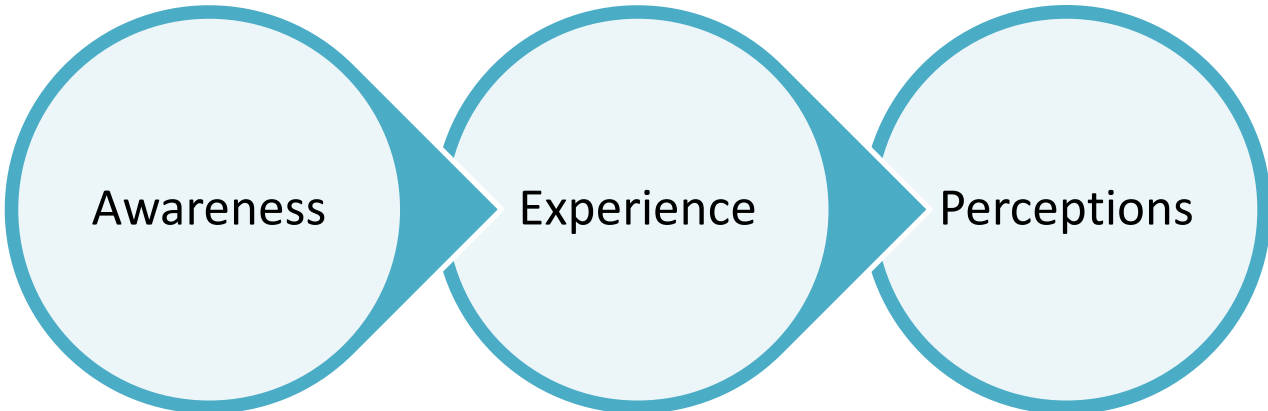
*Our water in Wales  
is superior quality  
to anywhere else  
Swansea AB*

*I'm not aware it's  
not-for-profit...why  
are they NFP?  
Pembroke AB*

*They [DCWW]  
charge  
too much  
Pembroke AB*



This research is typical of other projects in terms of how customers spontaneously talk about Welsh Water:



High awareness but few take a close interest; understanding of DCWW role and responsibilities vague

A minority have first hand experiences: mixed picture as some recall the problem while others recall the solution. Usually service experiences positive – though not all

- ✓ Wales has good quality water
- ✓ Water is in abundance
- ✓ Uninformed views about DCWW brand: assumed to do a good job
- ✗ Poor experience leaves impression of inefficiency, ineptness
- ✓ Approximately a third aware of NFP
  - Mainly positive, increases trust
  - Some sceptical: NFP at odds with bills higher in Wales; raises questions about board salaries

*I don't question the bills because we have no choice*  
Bangor C1C2

- Views that drive scepticism (but often neutralised by NFP)**
- Water more expensive in Wales than England
  - Water piped to Birmingham/Liverpool (at cost to Welsh communities, National Park)
  - No competition in water

*Profits are calculated after salaries are paid so there's probably high salaries at the top*  
Pembroke AB



*I don't understand how my in-laws in Cambridge pay less than me but they're getting their water from Wales! It really annoys me!*  
Swansea C1C2

*I always see ads about not-for-profit*  
Pembroke AB

*They [DCWW] have a good reputation, they are well known*  
Cardiff AB

*They are a bilingual company*  
Bangor C1C2

*I don't know anything about them [DCWW]...but easier to deal with vs other utilities*  
Pembroke DE



*Call centre staff are authentic, not reading from a script*  
Cardiff Vulnerable

*We had a bad experience, They hooked my house up to next door. They had a baby and were in all the time so their water was really expensive....it took a while to sort out.*  
Swansea AB



About Welsh Water...


- Customers accept the ‘hard’ facts about size and scale
- Few aware of social tariffs: hard to evaluate this fact in isolation
- Impressed that DCWW the 4<sup>th</sup> largest – but would like to know more about £1bn contribution

Not for profit...

- Those previously unaware pleasantly surprised
- For majority, this is very positive
- Most envisage that this is a social enterprise benefitting Wales (not shareholders)
- Some (often higher SEG) question how it works – and how a NFP has £32m ‘profit’ etc.

Industry comparisons

- Water quality, environment rating and SIM all in line with industry
- Customers unable to guess why bills higher than average: problematic for those linking with supply of water to England

 Explanation (rural and coastal cost dynamics): most fairly accepting

Full stimulus appended

About Welsh Water.....

- 1. 4 million customers across most of Wales, Herefordshire and parts of Deeside
- Operate around 27,000km of water mains and over 30,000km of sewers
- Help around 60,000 customers with our social tariffs
- Contribute around £1 billion a year to the Welsh economy
- 4th biggest company in Wales

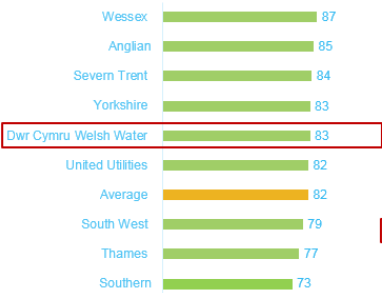


Not for profit.....

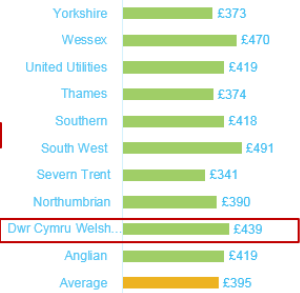
- Unique in utility sector – not-for-profit
- Last year, Welsh Water returned £32 million of value to customers through e.g. extra help for people who struggle paying bills, educational projects in communities, money off bill, invest in the infrastructure and more
- This was consulted on in its ‘Have your say campaign’ to see how customers want this spent.
- Welsh Water will be releasing the results of the consultation and how the money will be re-invested later on in the year.



Customer Service Rating 2015 - OFWAT



Average water and sewerage bill 2017-18 DiscoverWater.com





Widely  
anticipated  
spontaneously

Population growth and its impacts (more homes, greater demand on services)

Pressure on infrastructure (aging pipes)

Climate change (primarily drier conditions anticipated)

Need for more water storage to avoid droughts

Affordability: people increasingly struggling to pay

Need to reduce demand via water efficiency and education

Need to innovate around grey/water recycling

Cyber security

*NB fieldwork took place just post May 2017  
WannaCry cyber attack*

- Expectation that DCWW will be anticipating and planning for these challenges as part of running the business
- Risks, however, are distant in customers' minds: few have any experience of water failures or a sense of urgency to tackle these challenges
- Minority add the need to drive efficiencies into the future...potentially more pressing for a NFP (because not held to account by shareholders)



# Customer response to 8 challenges

- Some reflect their own thoughts on challenges: population, climate, infrastructure
- Others less intuitive
  - Welsh economy, environment and regulations following Brexit not considered...but logical
  - Public health challenges not considered – unclear what this relates to
  - Customer expectations and 'personalised service' a little baffling
- Challenges seen to overlap (tackling one will benefit another)



**Population:** Population growth will lead to increased water demand in certain areas; an ageing population may lead to more customers in vulnerable circumstances.



**Climate:** Climate change will result in more extreme rainfall events, which could lead to increased risk of flooding and pollution. Drier, hotter summers are predicted, which could result in water supply shortages and possibly increased water demand.



**Customer expectations:** Customer expectations are likely to change dramatically with a desire for a more personalised service and less tolerance of service outages e.g. water stoppages.



**Economy:** Changes are expected in the Welsh economy, such as: the contraction of large heavy water using industries; the increase of tourism which has different pressures on the water system; and rising energy costs. All of these could present challenges to Welsh Water in the future.



**Environmental:** Invasive species, land use change and increased risk of environmental pollution may lead to a reduction in water quality. However, working together with other organisations could lead to better environmental outcomes.



**Infrastructure:** Ageing infrastructure, such as pipe and treatment works, and cyber security are key concerns for future service provision; but technological advances could lead to significant efficiencies in the planning, delivery and operation of water services.



**Regulatory:** Changes in policy and regulation are expected due to the UK leaving the European Union, this creates uncertainty, but provides the opportunity for us to help shape future policy.



**Public health:** Regulatory standards to protect drinking water quality are likely to continue to tighten in the future. Welsh Water will have a role to play in promoting healthier and more sustainable lifestyles for customers.

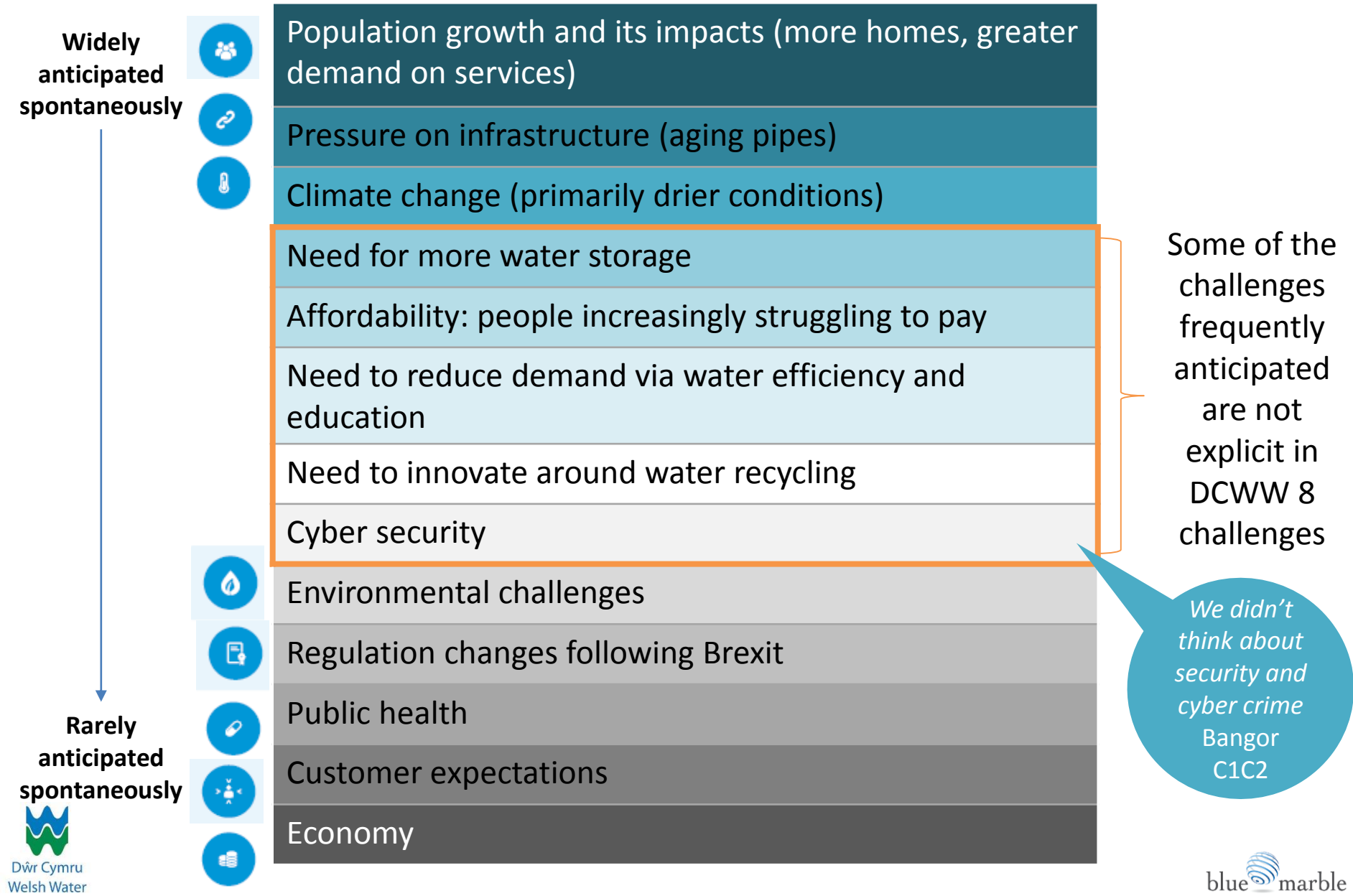
*Need to keep the price affordable but more importantly need to keep the water coming*  
Pembroke DE

*Climate change and increased demand [will be future challenges for Welsh Water]*  
Swansea C1C2



# Spontaneous challenges identified by customers vs challenges identified by DCWW

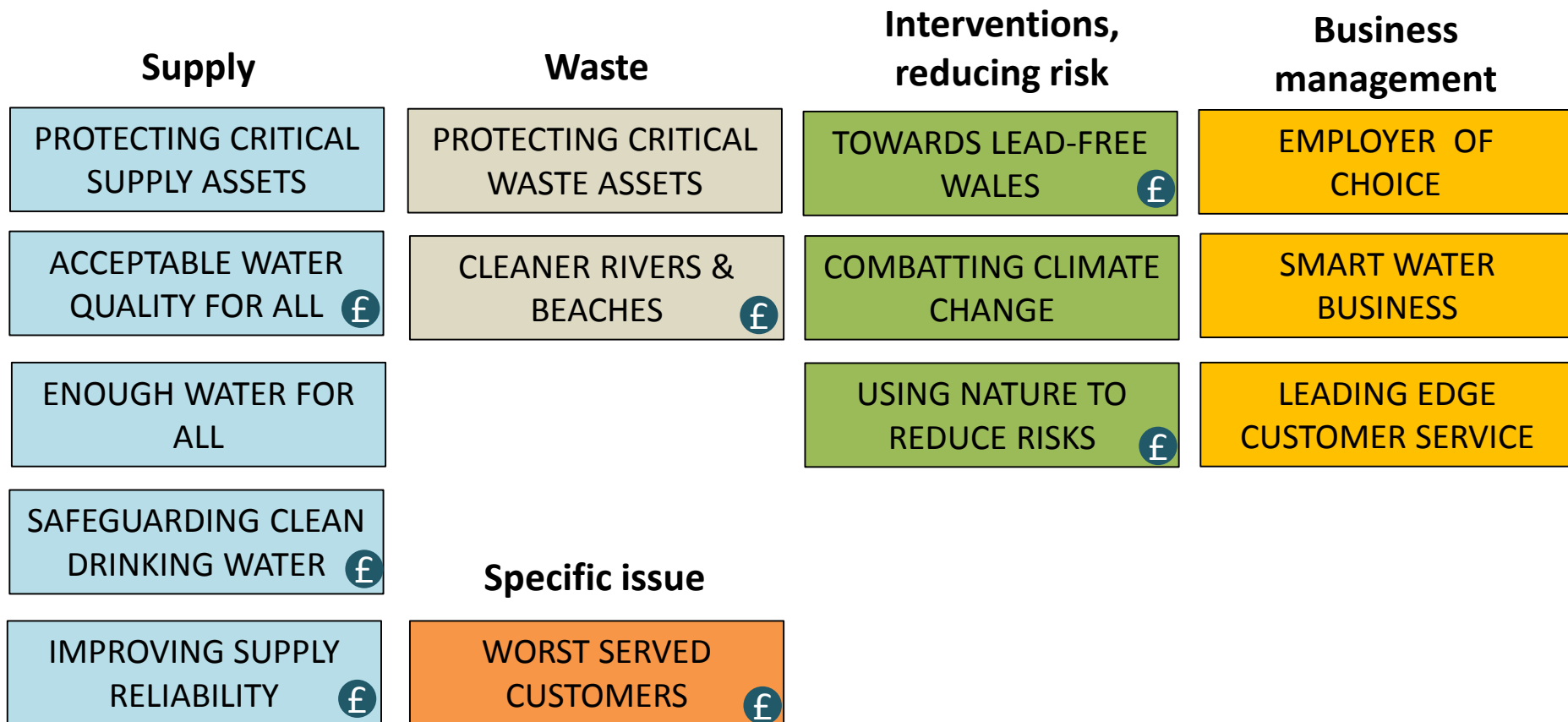
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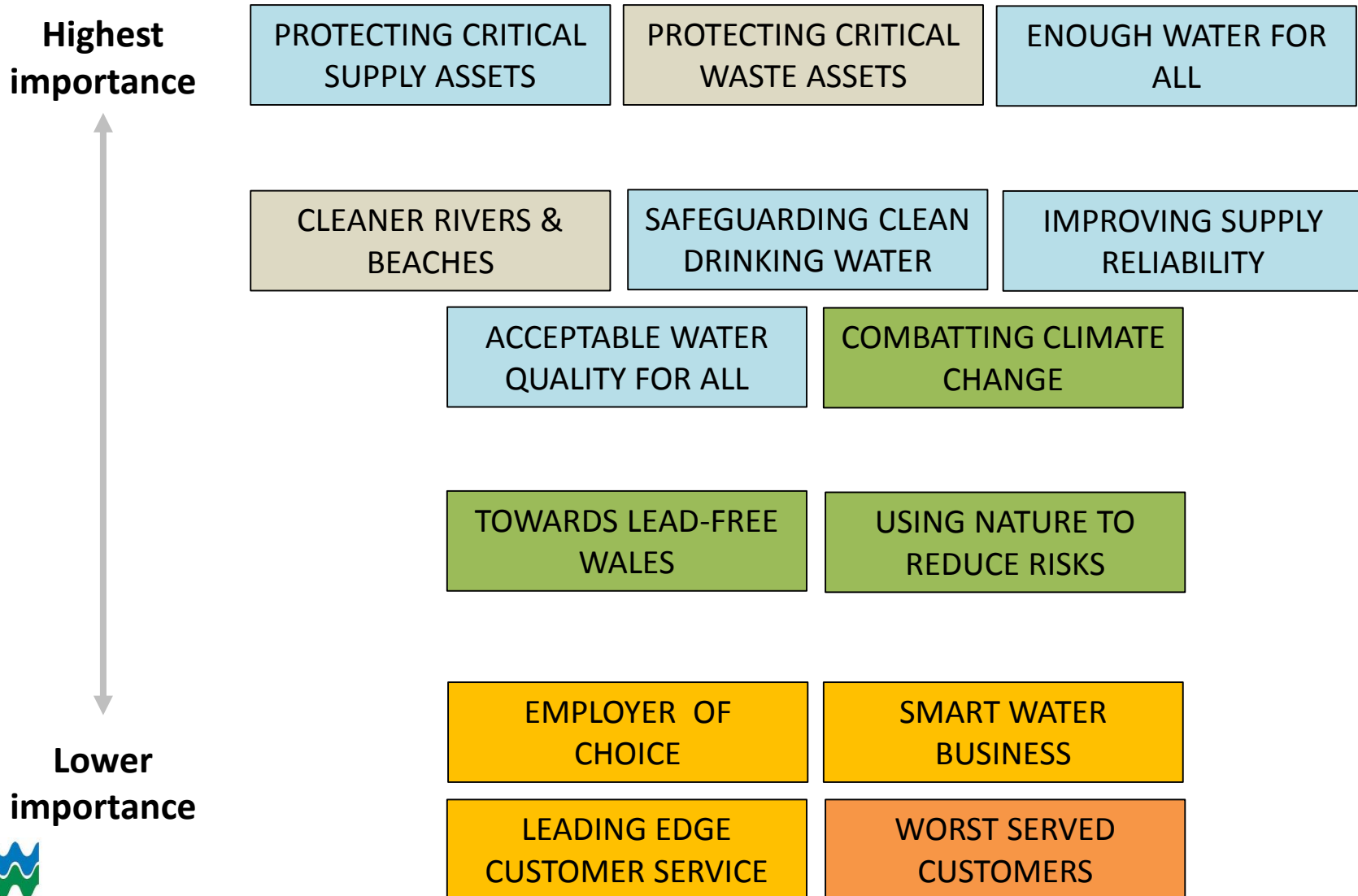
A close-up photograph of a showerhead spraying water against a dark background. The water is captured in motion, creating a fine mist of droplets. The showerhead is a modern, metallic design with a curved arm.

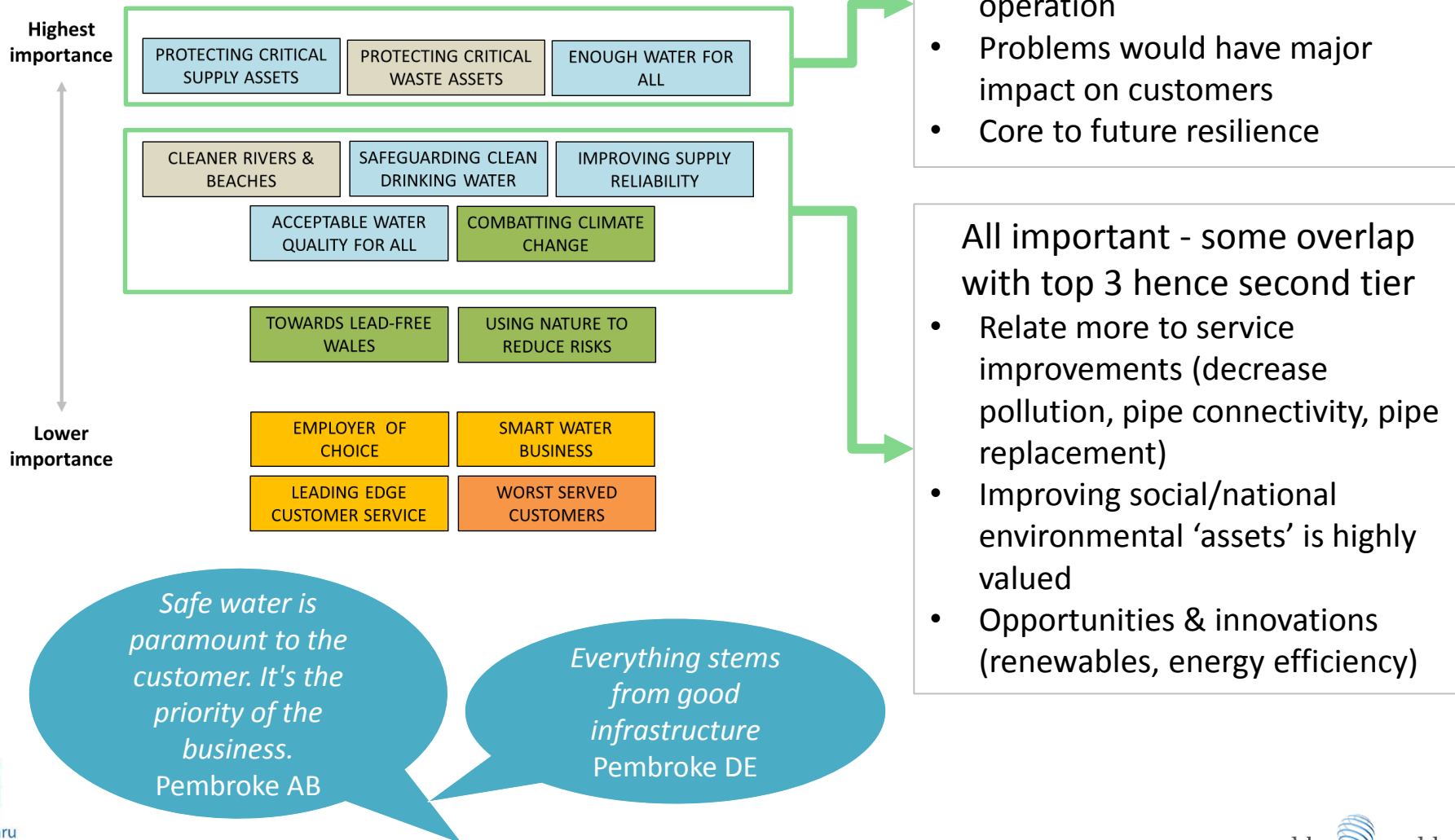
## **Evaluating 14 strategies within Water 2050**

1. Respondents introduced to 14 strategies (posters developed from *Water 2050* document)
2. Post-it note exercise to identify top and bottom importance
3. Investment options also discussed for 7 strategies £

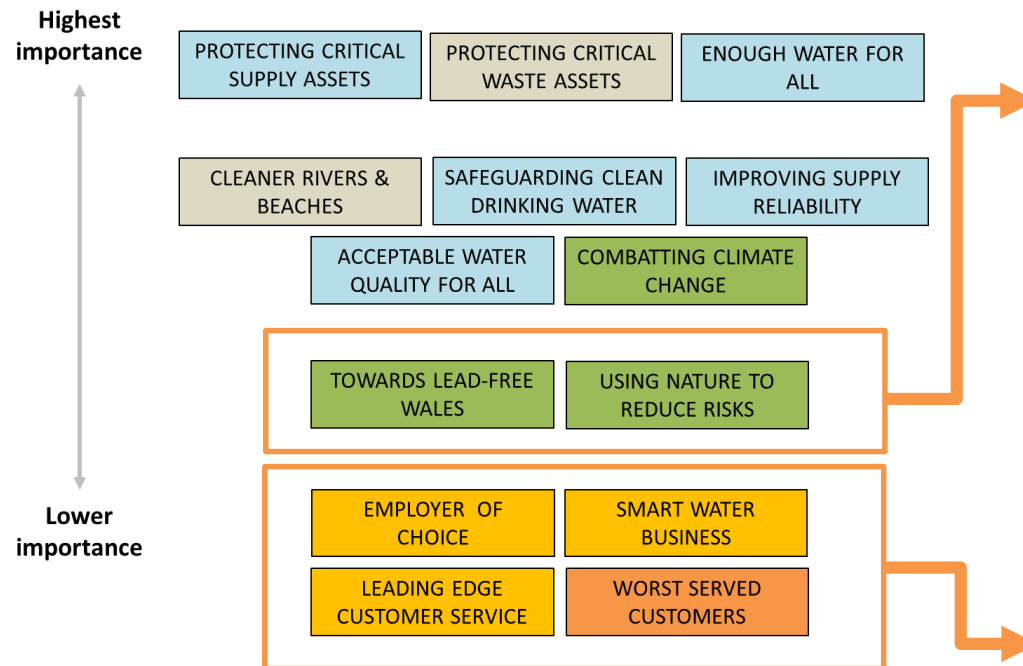


All are seen as important for future planning...but some are given higher priority than others









Polarised views across and within the group discussions

- For some any lead is unacceptable...while for others no urgency as perceive system is safe
- RainScaping initiatives highly appealing to some (simple, preventative, attractive) but not always seen to be as important
- Lower social groups more likely to prioritise both lead-free Wales and RainScaping

Relatively relatively less important

- Poor customer service a lesser evil than no service at all...(and less important if service performance is very high)
- For most, employer role and Smart Water are internal rather than customer-facing strategies (more how you do it than what you do)
- *NB: Some (notably ABs and younger) felt employer of choice & smart water business were much more important and signified investing in the future*
- Worst served: seen as a minority issue

## SAFEGUARDING CLEAN DRINKING WATER BY WORKING WITH NATURE

### WHAT'S THE BACKGROUND TO THIS?

All our water comes from the environment in the first place. This strategy is about how we manage the process of collecting and treating the water. In the future, our emphasis is on improving the natural environments from which we collect water – such as preventing pollution getting into rivers and streams – to improve the water quality before it is treated.



### WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Environmental:** More intensive farming and tree felling risks more pesticides and fertilisers getting into rivers and streams.
- Climate:** More intense storms also mean pesticides, fertilisers and animal dung runs off farm land into water courses.
- Public health:** In turn, this means using more chlorine treatment to clean the polluted water. Some studies have linked this to health conditions like asthma.
- Regulatory:** Regulations will tighten for water quality in light of the increased risk of polluted rivers, streams and coasts.
- Economic:** Increased tourism could result in seasonal variation for water demand and put pressure on local treatment works and river levels.



### WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

- We will work closely with farmers to prevent pollution of rivers and streams.
- We'll offer incentive schemes for land owners to adopt practices that will benefit river quality and surrounding ecology.
- We'll purchase, where possible, land that poses the highest risk to water quality so that we can manage it better.
- We will conduct cost-benefit analyses of processes that are less reliant on chemicals.
- We'll invest in new monitoring technology to detect and prevent water pollution as early as possible.

### HOW WIDELY DO YOU THINK WELSH WATER TO IMPLEMENT THESE ACTIONS?

- COST OPTION 1:** Make a start, prioritising the areas most at risk.
- COST OPTION 2:** Take a more aggressive approach, targeting areas that are most at risk.
- COST OPTION 3:** Take a more aggressive approach, targeting areas that are most at risk.

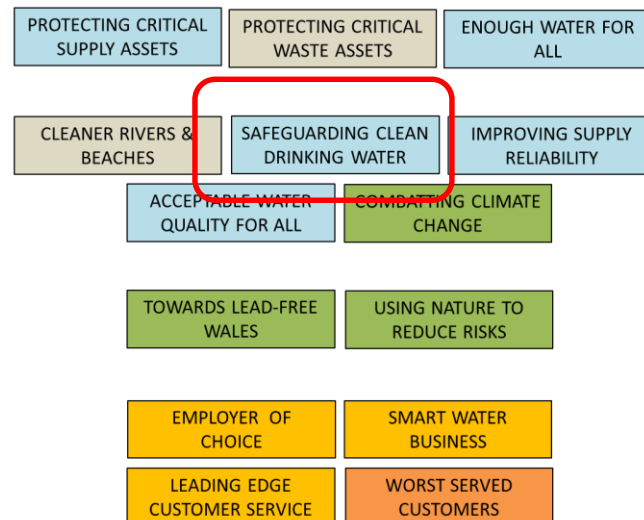
£150m investment

### Rationale for importance:

- ✓ Support for preventing pollution at source: better for nature and wildlife; natural solutions more sustainable than hi-tech ones
- ✓ Future of natural environment vital to quality of life (and life itself)
- ✓ Many uncomfortable with (more) chemical treatments
- ✓ Likely to be cost effective in long term
- ✓ Many draw on heuristics:
  - Prevention is better than cure
  - Natural better than chemical

Highest  
importance

Lower  
importance



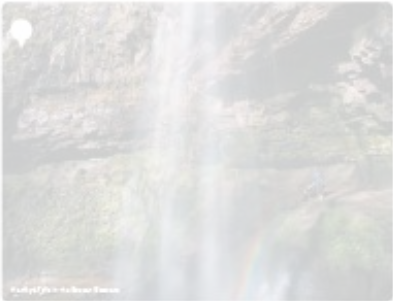
Better to work with  
than against nature  
because of the wider  
impact it can have  
Swansea AB



SAFEGUARDING  
CLEAN DRINKING WATER  
BY WORKING WITH NATURE

WHAT'S THE BACKGROUND TO THIS?

All our water comes from the environment in the first place. This strategy is about how we manage the process of collecting and treating the water. In the future, our emphasis is on improving the natural environments from which we collect water – such as preventing pollution getting into rivers and streams – to improve the water quality before it is treated.



WHAT ARE THE CHALLENGES  
WELSH WATER FACES?

- Deforestation:** More intensive farming and tree felling raise more pesticides and fertilisers getting into rivers and streams.
- Climate:** More intense storms also mean pesticides, fertilisers and animal dung run off farm land into water courses.
- Public health:** In turn, this means using more drinking treatment to clean the polluted water. Some studies have linked this to health conditions like asthma.
- Regulatory:** Regulations will tighten for water quality in light of the increased risk of polluted rivers, streams and coasts.
- Seasonal:** Increased tourism could result in seasonal variation for water demand and put pressure on local treatment works and river levels.



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TO RESPOND TO THE CHALLENGES?

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2. We'll offer incentive schemes for land owners to adopt practices that will benefit river quality and surrounding ecology.
3. We'll purchase, where possible, land that poses the highest risk to water quality so that we can manage it better.
4. We will conduct or help fund research to develop new treatment processes that are less reliant on chemicals.
5. We'll invest in new monitoring technology to target and deal with water pollution earlier.

HOW WIDELY DO YOU WANT  
WELSH WATER TO IMPLEMENT  
THESE ACTIONS?

**COST OPTION 1:**  
Make a start, prioritising the areas most at risk.

- 11 million customers will get the benefit of these investments
- Improving water quality across a quarter of the region
- Reducing reliance on chemicals
- Improving river environments for wildlife and communities to enjoy

£150m investment

**COST OPTION 2:**  
Comprehensive scheme covering many more areas.

- 2.6 million customers will get the benefit of this work
- Improving water quality across two thirds of the region
- Preventative actions will create savings of £1m per year

£400m investment

**COST OPTION 3:**  
No additional investment

£0 investment

Highest & lowest support for proposed actions:

- ↑ Research to develop new treatment processes less reliant on chemicals
- ↑ Work with farmers to prevent pollution
- ↓ Purchase land posing highest risk to water quality

Option	Reasons for support
1: Make a start £150m 32/77	Most cost-effective as reaches more customers per £. Also mentions chemical reductions.
2: Comprehensive £400m 34/77	Will have positive knock-on effects; saves money in long run
3: No additional investment 11/77	Perceive other more urgent problems require investment

Equal support for moderate and comprehensive investment

# IMPROVING THE RELIABILITY OF DRINKING WATER SUPPLY SYSTEMS

## WHAT'S THE BACKGROUND TO THIS?

All of us should be able to expect a clean, safe and continuous supply of water. Losing supply for a day or more is very disruptive and this strategy is about avoiding supply stoppages.



## WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Infrastructure:** Currently the supply pipe network is not a joined-up grid and consequently most customers can only be supplied by a single water source such as a reservoir. If the reservoir goes out of action – or any part of the pipework from the reservoir to your house – water cannot be restored until the repairs are made.
- Climate:** Extreme weather events can be a cause of damage to the network such as burst pipes and pollution from pesticides running off farm land.
- Environment:** Increased pollutants getting into the water network from farming land, invasive species as well as extreme weather events all increase the risk of the water treatment system failing.



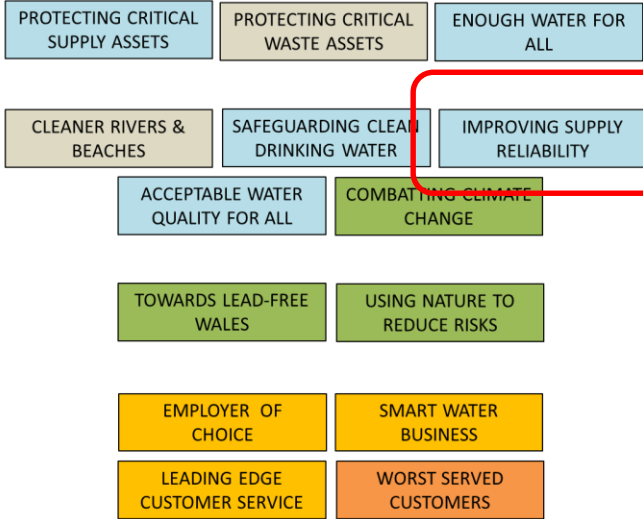
## WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

- We will improve the connectivity of the network so that more customers can be supplied by an alternative water source should a treatment works, reservoir or part of the network fail.
- We will invest in link up our pipework.
- We will invest in research to find more efficient treatment solutions.
- We will make treatment works more resilient to attack or contamination.
- We will build more water storage (on both local and regional scales) in case of supply stoppages.

## HOW WIDELY DO YOU WANT WELSH WATER TO TAKE THESE ACTIONS?

- COST OPTION 1:** Make a short, prioritised treatment around larger supply areas.
- Build a more flexible grid system to supply the 1.2 million customers currently at risk if a major treatment works fails.
  - Providing a second supply source for an additional 10,266 customers.
  - In 2050, 32,754 customers will remain reliant on one supply source.
- COST OPTION 2:** Make a short, prioritised treatment around larger supply areas.
- Build a more flexible grid system to supply the 1.2 million customers currently at risk if a major treatment works fails.
  - Providing a second supply source for an additional 10,266 customers.
  - In 2050, 32,754 customers will remain reliant on one supply source.

Highest importance  
↑  
Lower importance



## Rationale for importance:

- A fundamental aim - disruptions to be avoided - but customers don't see as a current problem area
- Some argue that quality is more important than reliability
- Reliability linked to eliminating contamination: therefore strategy relates to water quality (healthy and pollution-free water)
- Need for close monitoring and back-up systems

Quality is more important than reliability - happy to have interruptions here and there Swansea AB

It's a no brainer, it's fundamental to the organisational goal Cardiff C1C2



## IMPROVING THE RELIABILITY OF DRINKING WATER SUPPLY SYSTEMS

### WHAT'S THE BACKGROUND TO THIS?

All of us should be able to expect a clean, safe and continuous supply of water. Losing supply for a day or more is very disruptive and this strategy is about avoiding supply stoppages.



### WHAT ARE THE CHALLENGES WELSH WATER FACES?



**Infrastructure:** Currently the supply pipe network is not a joined-up grid and consequently most customers can only be supplied by a single water source such as a reservoir. If the reservoir goes out of action – or any part of the pipework from the reservoir to your house – water cannot be restored until the repairs are made.



**Climate:** Extreme weather events can be a cause of damage to the network such as burst pipes and pollution from pesticides running off farm land.



**Environment:** Increased pollutants getting into the water network from farming land, invasive species as well as extreme weather events all increase the risk of the water treatment system failing.



### WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

1. We will improve the connectivity of the network so that more customers can be supplied by an alternative water source should a treatment works, reservoir or part of the network fail.
2. We will invest in research to discover new tunnelling techniques to link up our pipework to become an integrated grid.
3. We will invest in research to find more efficient treatment solutions.
4. We will make our treatment works more secure from any type of attack or contamination.
5. We will build more water storage (24 hours' worth) of treatment works in case of supply stoppages.

### HOW WIDELY DO YOU WANT WELSH WATER TO IMPLEMENT THESE ACTIONS?

#### COST OPTION 1:

Make a start, prioritising treatment around larger supply areas.

- Build a more flexible grid system to supply the 1.2 million customers currently at risk if a major treatment works fails.
- Providing a second supply source for an additional 10,266 customers.
- In 2050, 327,644 customers will remain reliant on one supply source.

£600m investment

#### COST OPTION 2:

Comprehensive scheme covering smaller areas and including smaller supply areas.

- Providing a second supply source for an additional 305,695 customers.
- In 2050, 21,951 customers will remain reliant on one supply source.

£1.4bn investment

#### COST OPTION 3:

Keep to today's investment levels (i.e. no additional investment).

£0 investment



**Highest & lowest support for proposed actions:**

Improve connectivity of the network



Improve security of treatment works from contamination/crime



Build more storage (24 hours) in case of stoppages

Option	Reasons for support
1: Make a start £600m <b>40/77</b>	Grid idea & risks of one supply is unfamiliar. Seen as low risk hence choose lower investment level
2: Comprehensive £1.4bn <b>24/77</b>	The 'proper' job leaving far fewer people (22k vs 327k customers) at risk
3: No additional investment <b>13/77</b>	Customers mostly don't see a problem with reliability hence carry on as are.

*Strongest support for modest investment: preventative actions more popular than response measures (emergency storage)*



## ACHIEVING ACCEPTABLE WATER QUALITY FOR ALL CUSTOMERS

### WHAT'S THE BACKGROUND TO THIS?

Ageing water mains and more extreme weather events increase the risk of supplying water which is discoloured or has a poor taste. Welsh Water currently receives more complaints about this than other companies – this is largely because 40% of its mains pipework is the old iron stock which is less reliable than the new plastic pipe lines. This strategy is all about improving water quality through a targeted replacement of iron mains.



### WHAT ARE THE CHALLENGES WELSH WATER FACES?



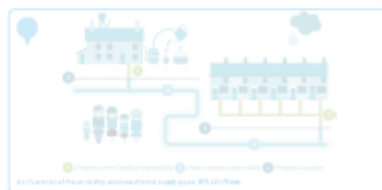
**Climate:** More extreme temperatures cause ground movement and changes in water pressure which can lead to burst pipes



**Infrastructure:** Iron pipework is prone to discolouring the water



**Population:** In some areas, a predicted decrease in population could result in less water running through supply pipes than they were designed for. This could mean more water quality issues like discolouration



### WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

1. Replacement over 7,000km of cast iron water mains with more reliable plastic pipes
2. To improve the water quality and reduce the risk of discolouration
3. Pipe replacement programme starting in 2025 to replace old iron water mains with plastic pipes
4. The water industry will continue to work on improving water quality

### HOW WIDELY DO YOU WANT THESE ACTIONS?

#### COST OPTION 1

Make a short, prioritising the replacement of iron water mains in areas for new plastic pipework where a water quality complaint came from

- Replace 500km of water mains
- Improve water quality for 5,000 customers
- Improve water quality for 5,000 customers
- Reduce annual water supply stoppages to 7 minutes per household

#### £600m investment

Cost to replace iron water mains with plastic pipes

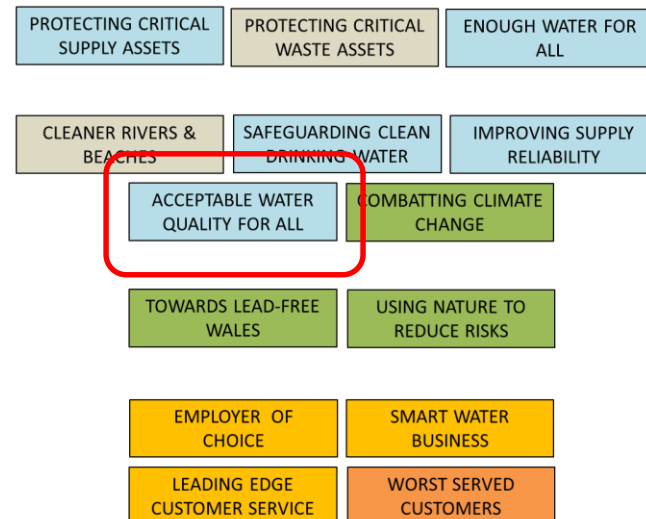
Cost to improve water quality for 5,000 customers

## Rationale for importance:

- Water quality fundamental for health and life
- Some surprised at proportion of iron pipework remaining
- Good infrastructure seen as critical to achieving high quality water
- However, some would prefer to see distinction between potable water and water for other uses (where quality less critical)
- Agree with principle that all should receive same water quality

Highest importance

Lower importance



All are entitled to good quality water  
Swansea C1C2



## ACHIEVING ACCEPTABLE WATER QUALITY FOR ALL CUSTOMERS

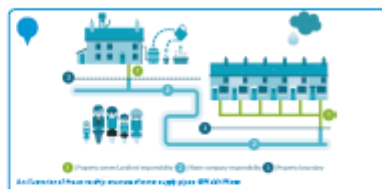
### WHAT'S THE BACKGROUND TO THIS?

Ageing water mains and more extreme weather events increase the risk of supplying water which is discoloured or has a poor taste. Welsh Water currently receives more complaints about this than other companies – this is largely because 40% of its mains pipework is the old iron stock which is less reliable than the new plastic pipe lines. This strategy is all about improving water quality through a targeted replacement of iron mains.



### WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Climate:** More extreme temperatures cause ground movement and changes in water pressure which can lead to burst pipes.
- Infrastructure:** Iron pipework is prone to discolouring the water.
- Population:** In some areas, a predicted decrease in population could result in less water running through supply pipes than they were designed for. This could mean more water quality issues like discolouration.



### WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

1. Replacement over 11,000km of cast iron water mains with more reliable plastic pipes.
2. Studies to prioritise the pipe replacement in areas where customers are most likely to notice water quality issues.
3. Pipe replacement innovation around 'no-dig' techniques to avoid disruption and minimise cost.
4. Research into new pipe cleaning techniques.

### HOW WIDELY DO YOU WANT WELSH WATER TO IMPLEMENT THESE ACTIONS?

#### COST OPTION 1:

Make a start, prioritising the areas for new plastic pipework where most water quality complaints come from.

- Replace 500km of water mains
- Improve water quality for 5,000 customers
- Improve leakage by 7%
- Reduce annual average minutes lost to supply stoppages to 7 minutes per household

£600m investment

#### COST OPTION 2:

Comprehensive pipe replacement extending across all areas.

- Replace 8,500km of water mains
- Improve water quality for 76,000 customers
- Reduce annual average minutes lost to supply stoppages to 3 minutes per household

£2.4bn investment

#### COST OPTION 3:

Keep to today's investment levels (i.e. no additional investment)

£0 investment

### Highest & lowest support for proposed actions:



Replace iron pipes with reliable plastic ones



Innovation re 'no-dig' techniques



Research into pipe cleaning techniques

Option	Reasons for support
<b>1: Make a start</b> <b>£600m</b> <div>34/77</div>	This investment seen to be one of several planned actions contributing to water quality – prioritising problem areas
<b>2: Comprehensive</b> <b>£2.4bn</b> <div>17/77</div>	Size of investment not supported in light of relatively low numbers of customers who will benefit from wider replacement programme
<b>3: No additional investment</b> <div>26/77</div>	Water quality shown to be very high (over 99%) which leads some to question the need to accelerate pipe replacement

*Strongest support for modest investment and actions that can start today*



## TOWARDS A LEAD FREE WALES

### WHAT'S THE BACKGROUND TO THIS?

Water quality is very high in Wales and it complies with all the World Health Organisation safety standards. However, there are known health impacts of excessive exposure to lead with children and pregnant women at most risk. While most of the old lead pipes have been replaced, it is estimated that around 25% of homes have lead pipes. As well as possible health risks, lead pipes are prone to leaking after a freeze. Most of the remaining lead pipes belong to the customer and are not part of Welsh Water's network. This strategy is about Welsh Water taking on responsibility for replacing lead pipes for wider societal benefit.



### WHAT ARE THE CHALLENGES WELSH WATER FACES?



**Climate:** More extreme temperatures cause ground movement and changes in water pressure which causes particular problems with lead pipes.



**Public health:** Lead exposure through pipework is linked to behavioural problems and lower IQ.



**Regulatory:** Currently Welsh Water is not responsible for the upkeep of most of the remaining lead pipework as this is on customers' properties.



### WHAT ACTIONS IS DCWW PROPOSING TO TAKE?

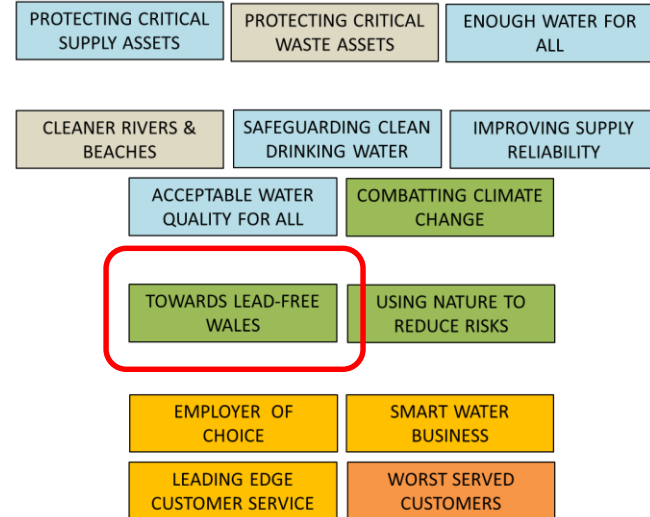
1. Replacing lead pipes with high quality lead
2. Replacing lead pipes with high quality lead
3. Replacing lead pipes with high quality lead
4. Replacing lead pipes with high quality lead

### HOW WILL WELSH WATER IMPLEMENT THESE ACTIONS?

- **COST OPTION 1:** Make a start by replacing lead pipes at the base of lead pipes (the most common problem). This is a comprehensive approach that will require changes to the way we make Welsh Water responsible for lead pipes. **£400m investment**
- **Replace lead pipes with high quality lead:** 2000 pipes per year with an average lead pipe life of 10 years. **£400m investment**
- **Replace lead pipes with high quality lead:** 2000 pipes per year with an average lead pipe life of 10 years. **£400m investment**

Highest importance

Lower importance



### Importance polarises customers:

- 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
- 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)
- Whereas others do not perceive a problem (esp. older); and see that householders are responsible
- Clear role for DCWW is to make affected customers aware of situation



## TOWARDS A LEAD FREE WALES

### WHAT'S THE BACKGROUND TO THIS?

Water quality is very high in Wales and it complies with all the World Health Organisation safety standards. However, there are known health impacts of excessive exposure to lead with children and pregnant women at most risk. While most of the old lead pipes have been replaced, it is estimated that around 25% of homes have lead pipes. As well as possible health risks, lead pipes are prone to leaking after a freeze. Most of the remaining lead pipes belong to the customer and are not part of Welsh Water's network. This strategy is about Welsh Water taking on responsibility for replacing lead pipes for wider societal benefit.



### WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

1. Replacement of all pipes recording higher than normal lead readings
2. Replacement of customers' pipes where the customer is vulnerable or where there is a pregnant woman or children under 6
3. Replacement of any lead pipes identified where a meter is being installed
4. Offering grants to customers who wish to replace their lead pipes

### HOW WIDELY DO YOU WANT WELSH WATER TO IMPLEMENT THESE ACTIONS?

#### COST OPTION 1

Make a start in addressing the issue of lead pipes (a comprehensive option would require a change in the law to make Welsh Water legally responsible for customers' supply pipes)

- Replace about 140 pipes per year which show above average lead readings
- Replace lead pipes in over 20,000 properties over next 15 years for households with pregnant women and children under 6

- 1,500 households per year have lead pipes replaced as part of meter installations
- Offer grants of £750 per household for customers to replace lead pipes

£45m investment

#### COST OPTION 2

Keep to today's investment levels (i.e. no additional investment)

£0 investment

### WHAT ARE THE CHALLENGES WELSH WATER FACES?



**Climate:** More extreme temperatures cause ground movement and changes in water pressure which causes particular problems with lead pipes



**Public health:** Lead exposure through pipework is linked to behavioural problems and lower IQ



**Regulatory:** Currently Welsh Water is not responsible for the upkeep of most of the remaining lead pipework as this is on customers' properties

### Highest & lowest support for proposed actions:



Replace all lead pipes with high lead readings



Replacement of lead when meter installed



Offering grants to customers wishing to replace own lead pipes

### Option

### Reasons for support

1: Make a start  
£45m

57/77

Relatively small investment will have positive impact on both deteriorating pipes and health

2: No additional  
investment

19/77

Around a quarter don't see as a big issue; responsibility of householders not water company

*Strongest support for modest investment to eliminate immediate public health risk*



# ADDRESSING 'WORST SERVED' CUSTOMERS

## WHAT'S THE BACKGROUND TO THIS?

Some customers experience repeated problems such as discoloured water, unexpected water supply stoppages, odour from sewage treatment works, sewage flooding in their home, or low water pressure. Welsh Water has 425 households who have repeated problems. This is largely due to the need to prioritise resources to invest in areas where there are most people. Permanent fixes for customers in rural locations are proportionately very expensive.



## WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Population:** Predictions on population size means Welsh Water will need to plan for variations which may affect service such as urban creep due to increasing population size.
- Customer expectations:** Customers in future may expect a universally good service irrespective of the cost of the fix.



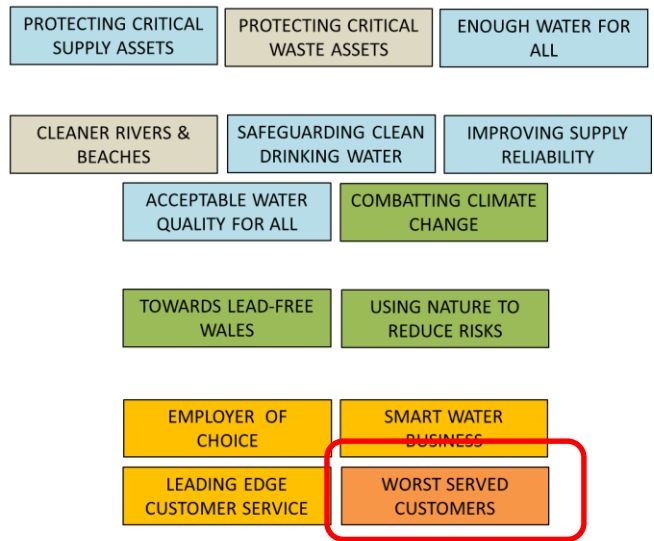
## WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

1. Implementing a set of minimum service standards irrespective of cost.
2. A commitment to stop billing a customer during a service quality failure.
3. New schemes to help prevent the common problems (leakage, sewer leaks in the home, water discoloration etc.)

## HOW WIDELY WELSH WATER TO IMPLEMENT THESE ACTIONS?

- COST OPTION 1:** Make a start by not charging the worst served in the event of service quality issues.
- Today this would mean 425 customers are not charged for the service.
  - 40m investment (but a cost of 40m).
- COST OPTION 2:** Comprehensive programme to tackle poor service for customers who have been 'worst served'.
- Address 32 repeated pressure complaints and 29 odour complaints.
  - Pipe replacement where there have been repeated.

Highest importance  
↑  
Lower importance



## Importance rated lower:

- Driven by the very small number of households affected (425)
- Response relates to personal values and whether identify with worst served or everybody else paying more to improve for all: 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
- Also perceive new householders will have to accept a known situation



ADDRESSING 'WORST SERVED' CUSTOMERS

WHAT'S THE BACKGROUND TO THIS?

Some customers experience repeated problems such as discoloured water, unexpected water supply stoppages, odour from sewage treatment works, sewage flooding in their home, or low water pressure. Welsh Water has 425 households who have reported problems. This is largely due to the need to prioritise resources to invest in areas where there are most people - permanent fixes for customers in rural locations are proportionately very expensive.



WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Population Predictions on population size means Welsh Water will need to plan for variations which may affect service such as urban creep due to increasing population size.
- Customer expectations: Customers in future may expect a universally good service irrespective of the cost of this fix.



WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

1. Implementing a set of minimum service standards irrespective of cost
2. A commitment to stop billing a customer during a service quality failure
3. New schemes to help prevent the common problems (odour, sewer leaks in the home, water discolouration etc.)

HOW WIDELY DO YOU WANT WELSH WATER TO IMPLEMENT THESE ACTIONS?

**COST OPTION 1:**  
Make a start by not charging the worst served in the worst of service quality issues.  
• Today this would mean 425 customers are not charged for the service.  
**£0m investment (but a cost of £6m)**

**COST OPTION 2:**  
Comprehensive programme to tackle poor service for customers who have been 'worst served'.  
• Address 32 repeated low pressure complaints and 29 odour complaints.  
• Pipe replacement where there have been repeated discolouration incidents (addressing the needs of 35 households).  
• Resolve the issue of water supply stoppages for 273 customers.  
• Resolve sewer blockages that overflow into the home for 55 customers.  
**£240m investment**

**COST OPTION 3:**  
Keep to today's investment levels (i.e. no additional investment) - affected customers continue to pay the same.  
**£0 investment**

Highest & lowest support for proposed actions:



New schemes to prevent the common problems



A commitment to stop billing a customer during a service failure



Implementing minimum service standards irrespective of cost (equal number choose as most and least favoured)

Option	Reasons for support	
1: Make a start £6m cost	25/77	A low cost approach which is fair on the worst served
2: Comprehensive £240m	23/77	Some stick with principle of same service for all...(could be me) others see as a disproportionate investment for so few customers (and not affecting me)
3: No additional investment	29/77	Worst served still receive the service. Assume other investments will help improve service for the few.

No clear support for single investment option: customers are divided.  
Most prefer remedial actions than waiving bills.

## USING NATURE TO REDUCE FLOOD RISK AND POLLUTION

### WHAT'S THE BACKGROUND TO THIS?

Sewer flooding is perhaps the worst experience that a water customer can have. It is our responsibility to reduce sewer flooding and pollution more generally by implementing better urban drainage systems – we call this RainScaping.

#### What is RainScaping?

- Building into our normal landscape ways to catch heavy rainfall before it overwhelms the sewers e.g. placing ponds and flowerbeds in built-up areas, fitting permeable paving and water butts to catch rain water



### WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Population:** Urban creep - which happens because of a rising population - means rain is more likely to fall onto hard and impermeable surfaces (roofs, roads and pavements) which puts pressure on the drains
- Climate:** Increasing heavy rainfall events will increase sewer flooding as the drains are overwhelmed by storm water
- Economics:** Councils are financially stretched which has an impact on the maintenance of highways; additionally, rising energy costs may lead to reduced levels of water processing which will increase the risk of environmental pollution
- Infrastructure:** The current drains cannot cope with people flushing 'unflushables' e.g. wet wipes and tampons causing blockages
- Environment:** Pressure on drains because of higher populations and more dense building can increase pollution getting into rivers. Tighter regulatory rules on spills from combined sewers
- Regulatory:** There will be tighter rules to reduce the incidents of sewer water spilling into coastal waters



### WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

- Use RainScaping to develop solutions with local communities
- We will reduce internal flooding
- Campaigns to stop people flushing the wrong things
- We will investigate the possibility of taking responsibility from local councils so that we can virtually eliminate the risk of sewer flooding

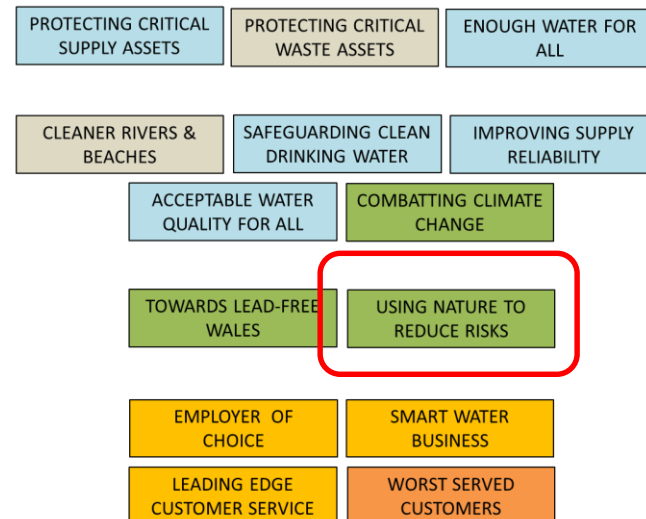
### HOW WIDELY DO WELSH WATER TO IMPLEMENT THESE ACTIONS?

- COST OPTION 1:** Make a start by introducing RainScaping to the major towns and cities where we can virtually eliminate the risk of sewer flooding
- COST OPTION 2:** Develop RainScaping solutions in the major towns and cities where we can virtually eliminate the risk of sewer flooding
- COST OPTION 3:** Use campaigns to stop customers flushing 'unflushables'

4700m sewer line

Highest importance

Lower importance



## Polarised views on importance:

- In this sample, lower social groups see as more important than higher (possibly an urban-rural split?)
- Seems intuitively right to work with nature
- Societal benefits: aesthetic as well as reducing rain water loss and flood risk
- Appears innovative
- Reduces chemical reliance for treatment
- But other strategies often hold greater importance



## USING NATURE TO REDUCE FLOOD RISK AND POLLUTION

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#### What is RainScapeing?

- Building into our normal landscape ways to catch heavy rainfall before it overwhelms the sewers e.g. placing ponds and flowerbeds in built-up areas, fitting permeable paving and water butts to catch rain water



### WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES?

1. Use RainScape to develop solutions with local communities
2. We will reduce flooding risk for all properties at high risk of internal flooding
3. Campaigns to stop people flushing the wrong things
4. We will investigate the possibility of taking responsibility from local councils so that we maintain the drains and sewers attached to public highways

### HOW WIDELY DO YOU WANT WELSH WATER TO IMPLEMENT THESE ACTIONS?

#### COST OPTION 1.

Make a start by introducing RainScapeing to the major towns and cities where we can virtually eliminate the risk of sewer flooding

- Focus on Cardiff, Newport, Wrexham and Chester
- Use campaigns to stop customers flushing 'unflushables'

£700m investment

#### COST OPTION 2.

Comprehensive programme to tackle drainage and pollution problems right across Wales

£2.6bn investment

#### COST OPTION 3.

Keep to today's investment levels (i.e. no additional investment)

£0 investment



### WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Population:** Urban creep – which happens because of a rising population – means rain is more likely to fall onto hard and impermeable surfaces (roads, roofs and pavements) which puts pressure on the drains
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- Infrastructure:** The current drains cannot cope with people flushing 'unflushables' e.g. wet wipes and tampons causing blockages
- Environment:** Pressure on drains because of higher populations and more dense building can increase pollution getting into rivers. Tighter regulatory rules on spills from combined sewers
- Regulatory:** There will be tighter rules to reduce the incidents of sewer water spilling into coastal waters

## Highest & lowest support for proposed actions:



RainScape in local communities; reducing flood risk for properties at high risk of internal flooding



Campaigns to stop people flushing the wrong things



Investigate taking responsibility for highway drains from local councils (equal number choose as most and least favoured)

Option	Reasons for support
1: Make a start £700m cost <b>31/77</b>	Sensible to prioritise where flooding occurs
2: Comprehensive £2.6bn <b>37/77</b>	Some customers choose this strategy because it includes their region; and will save money in the long run
3: No additional investment <b>9/77</b>	Minority choice (for most, anticipate things will get worse without some targeted investment)

*Highest support for comprehensive investment option to implement preventative community solutions right across Wales*



CLEANER RIVERS AND BEACHES

WHAT'S THE BACKGROUND TO THIS?

We know our customers place great importance on rivers and beaches – for their own pleasure and for the tourism industry in Wales. Therefore improving the quality of river and coastal waters is important. Achieving clean rivers and beach water is getting harder because of new pressures associated with a growing population - and more pollution getting into water in the environment.



WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Population:** Water companies need to take more water from rivers to meet the needs of a growing population.
- Climate:** The predicted increase in winter rainfall will damage the ecology of rivers and streams.
- Economic:** The cost of heating water is predicted to increase.
- Environmental:** Water in the environment is affected by the impacts of climate change and an increasing population.
- Regulatory:** Water quality regulations have been set by the EU so these might change following Brexit.

WHAT ARE THE OPPORTUNITIES WELSH WATER FACES?

- Public health:** people want safe and attractive places to do more outdoor recreation and many of our reservoirs and the rivers will help to provide this.



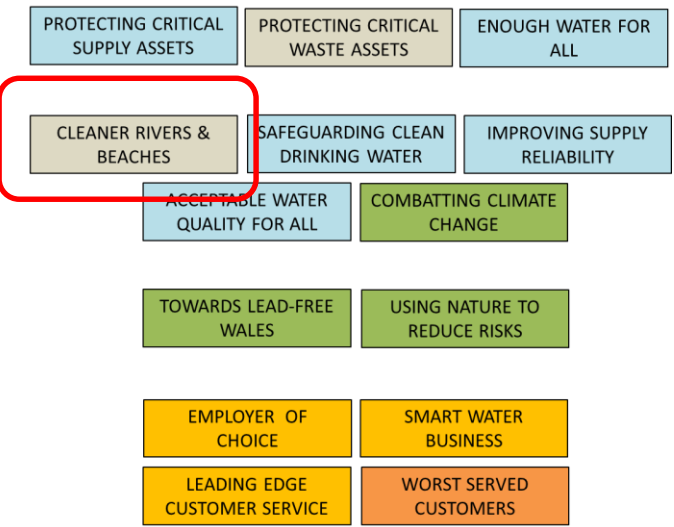
WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES/ OPPORTUNITIES?

1. A list of actions to improve water quality in rivers and streams, including measures to reduce pollution and improve water quality.
2. Reflecting our shared responsibility, working with local authorities, Wales and the Environment Agency to develop ways to improve water quality.
3. Specific projects to improve water quality in rivers and streams.
4. Conduct research and analysis to understand the potential impact of climate change on water quality.

HOW WIDELY DO YOU WANT THESE ACTIONS?

- COST OPTION 1:** Make a start by concentrating efforts where our operations are working well, with other agencies such as Natural Resources Wales and the Environment Agency to improve water quality across approximately 100km of rivers.
- COST OPTION 2:** Working with Natural Resources Wales and the Environment Agency to understand where water quality is poor and improve it across approximately 100km of rivers.
- COST OPTION 3:** Developing the river network to improve water quality across the entire river network.

Highest importance  
Lower importance



- **Consistently high importance:**
  - Driven by importance of tourism to Wales and personal significance of Wales' natural environment – Swansea and Bangor give this additional significance
  - Wider environmental views on the need to safeguard nature and the planet
  - Health benefits for beach users
  - 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

*This is vital for the Welsh economy, tourism and for personal enjoyment Swansea C1C2*



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WHAT ARE THE CHALLENGES WELSH WATER FACES?

- Population:** Water companies need to take more water from rivers to meet the needs of a growing population.
- Climate:** The predicted increase in weather-related events will damage the ecology of rivers and streams.
- Economic:** The cost of heating water is predicted to increase.
- Environmental:** Water in the environment is affected by the impacts of climate change and an increasing population.
- Regulatory:** Water quality regulations have been set by the EU so these might change following Brexit.

WHAT ARE THE OPPORTUNITIES WELSH WATER FACES?

- Public health:** people want safe and attractive places to do more outdoor recreation and many of our reservoirs are in scenic areas.



WHAT ACTIONS IS DCWW PROPOSING TO RESPOND TO THE CHALLENGES/ OPPORTUNITIES?

1. Assessing the impact of DCWW's operations on rivers and beaches where there are quality problems, specifically whether we are the confirmed cause, contributing to the problem or not directly part of the problem.
2. Reflecting our shared responsibility, working with Natural Resources Wales and the Environment Agency to develop ways to improve water quality in collaboration.
3. Specific projects to find ways to reduce pollution from farmland etc.
4. Conduct research and analysis to understand the potential impact of climate change on river levels and ecologies.

HOW WIDELY DO YOU WANT WELSH WATER TO IMPLEMENT THESE ACTIONS?

**COST OPTION 1:**

Make a start by concentrating our efforts where our operations are having a detrimental effect on the natural environment.

- Working with Natural Resources Wales and the Environment Agency to understand where we need to improve across approximately 1000km of rivers in Wales.
- Developing the right solution in the problem areas identified.

**£600m investment**

**COST OPTION 2:**

Comprehensive programme to work with other agencies such as Natural Resources Wales (even where our operations are not implicated in poor water quality).

- This would involve supporting river improvements across a further 5000km.

**£1.2bn investment**

**COST OPTION 3:**

Keep to today's investment levels (i.e. no additional investment).

**£0 investment**

Highest & lowest support proposed actions:



Assessing DCWW's impact on water quality problems; working with EA/NRW to make improvements



Research and analysis to understand climate change impact on river/beach ecologies

Option	Support
1: Make a start £600m cost <b>31/77</b>	High approval for collaborative working as responsibility seen to be shared
2: Comprehensive £1.2bn <b>33/77</b>	This would have wider societal and environmental benefits (but not always seen as core)
3: No additional investment <b>13/77</b>	Individual's relationship with rivers/coast can make a difference. Some not as engaged and vote for continuing today's investment

Equal support for investment that relates to DCWW operations – and comprehensive option for a wider collaborative role

A close-up, low-angle shot of a showerhead spraying water against a dark background. The water is captured in motion, creating a dynamic spray of droplets. The showerhead is metallic and has a modern, curved design. The background is dark and out of focus, emphasizing the water spray.

**Overall acceptability of future plans**

- The process of informing customers about future plans engages them: many comment on wanting to know more about DCWW generally
- When discussing investment options, while the option to make no additional investment was always provided – it was the least chosen option
  - The strategies have made the case for some investment
  - The choice not to make additional investment is based on the risk/problem being perceived as too small (e.g. water quality already very good)
- When offered the 'comprehensive' or 'progressive' (*make a start*) options, customers tend towards the more pragmatic 'make a start' investment
  - Appears to be better value for money
  - Often prioritises resources where most urgently needed/risk is greatest
  - Often meets dual challenges e.g. improves infrastructure reliability and reduces public health risk
  - Often seen to overlap or complement other strategies e.g. part of improving water quality
- Comprehensive strategy can look disproportionate in terms of value for money

*Welsh Water need to reach out with more information and tell everybody where the money coming from*  
Pembroke AB

*Make a start because never had a problem... doesn't need big investment for a small risk.*  
Hereford DE

*Customers expect DCWW to plan for the future and see the importance of all 14 strategies (albeit some less important than others).*

**Bangor: registered disabled man in 30s living independently.**

**Cardiff: recently bereaved female**

## **Responses very closely in line with main sample**

- Circumstances have no specific relevance to water
- Articulate people with similar attitudes and values

**Pembroke: wheelchair-bound, living in social housing.**

## **Responses influenced by specific circumstances**

- Repeated sewer flooding (affecting several houses)
- On special register (only after MP informed of this)
- No water bottles provided when stoppage occurred: *'my wife did phone and explain about the kidney transplant but they didn't mention anything about providing bottled water'*
- Happy to support investments but more sceptical about the scope of work and whether DCWW will actually do it

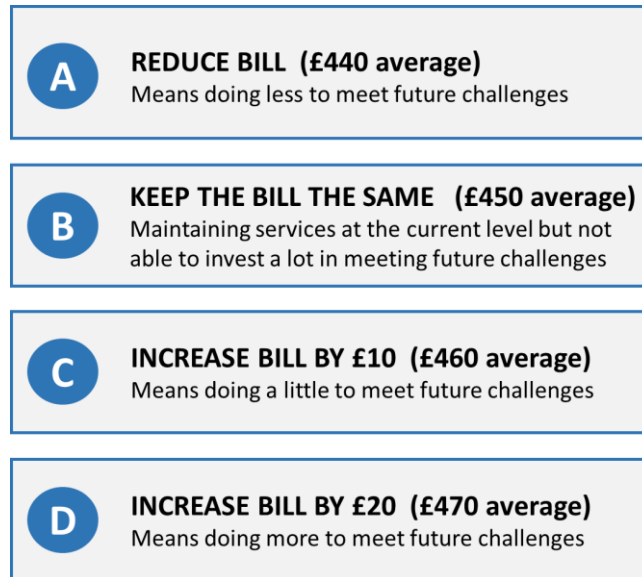
**Hereford: elderly & disabled farmer with smallholding**

**Swansea: disabled man with brain injury living independently.**

## **Nature of personal circumstances makes direct engagement difficult**

- Complex materials/14 strategies need to be communicated verbally
- Respondents struggle to draw conclusions
- Both resist any bill increases (responding like 'uninformed' customers despite exposure to strategies)





## Small minority support A (<1 in 10)

- Most reject because risk of service deterioration
- But some support for bill reductions as cynical about a) need for additional investment and b) perceive 'fat' in the finances (high salaries etc.)

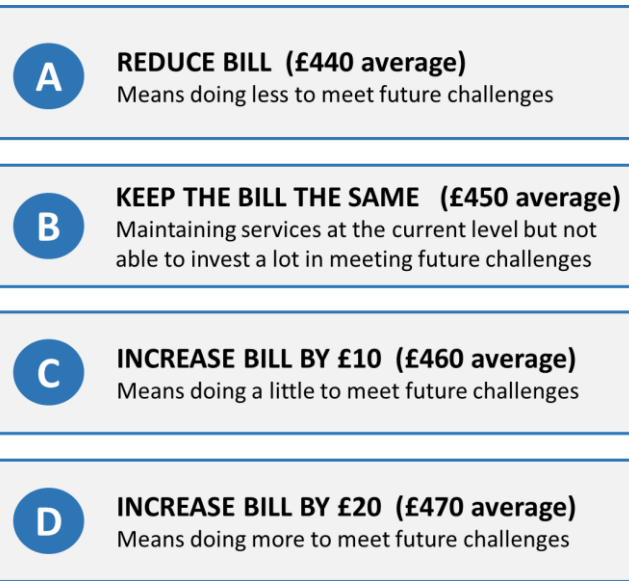
## Larger minority support B: (<1 in 5)

- Already doing good job: why the need to invest more?
- Generate other income streams instead of asking the customer
- Should be able to make efficiencies and continue to provide services (as public sector has in time of austerity)
- When DCWW bills higher than others (including regions that DCWW help to supply)
- Already make excess profit – so why the need?
- Other companies can charge less, why not DCWW?
- Non shareholder run company should be lower cost to run...why isn't it?

*Preparedness to pay is lowest amongst those who need clearer business case for why customers should contribute more.  
Affordability rarely mentioned overtly but may be a factor.*

*Don't want to see the bill go up - already making a profit - bill already expensive  
Swansea AB*





## Large minority support C: (approx. 1 in 5)

- Expect bill increases/inflationary increases (neutral not negative comment)
- Accept need for further investment, but this should be offset with excess profit
- Unwilling to go further than £10 without full understanding of the proposed plans
- Cost-conscious and keen to keep increases to a minimum (not convinced by need for £20 rise)

## Majority support D: (approx. 6 in 10)

- Expect bill increases (as above)
- £20 small sum relative to other utility rises
- NFP gives reassurance that investment will benefit Wales and its society
- Better to make comprehensive/proper investments: cheaper in long run
- Water bills currently reasonable
- Motivated by benefits to environment

*CAVEAT: Support for bill increase based on understanding that it is*

- *Justified*
- *Ring-fenced*
- *Transparent to customers*

*Majority supporting the highest bill increase option: this is another indication of acceptance of the strategies...rather than a scientific measure of willingness to pay!*

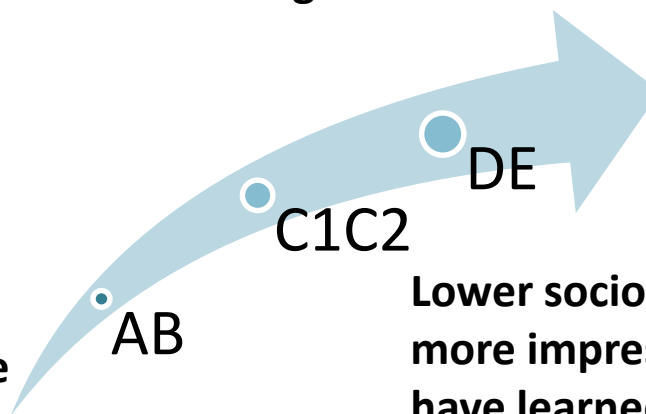




**Confidence particularly appears to increase among the lower income groups...**

**Higher socio-economic groups more likely to reserve judgement:**

- More likely to know that water companies governed by laws and regulators (it's not all about a company's values)
- Concerned that engagement is to test price tolerance of customers (not acceptance of plans)
- More questioning about the NFP structure and what this really means
- Plans lack innovation/vision
- Need to know about current performance and efficiency to be confident



**Lower socio-economic groups are more impressed with what they have learned:**

- Renewed sense of the critical and precious nature of water
- Perceive much greater role of water company than previously assumed
- Impressed with being consulted
- Reinforces generally good service experiences
- **BUT** also want reassurance about the rationale and value of any increase in bills – and evidence of where money is being spent





## **This research gives a solid endorsement from DCWW's domestic customers:**

- The strategies that make up Water 2050 appear to address the most important future challenges
- Customers expect DCWW water to be planning for the future and are happy to see it addressing challenges that are both in line with and beyond customer's experience/expectations
- The process of learning about future plans has led to increased confidence in DCWW

## **However, customers do challenge the plan where it does not explicitly address all that they hope to see:**

- **INNOVATION:** The long-term plan conveys DCWW as more active in forward planning than customers had realised – but not as a progressive, innovative, industry-leading brand. Specifically, customers expect to see innovations in relation to e.g. grey water, water capture and new ways to increase efficiencies/revenues
- **OPERATIONAL & CORPORATE EFFICIENCY:** Preparedness to pay is contingent on believing the bills are fair and justified – but customers can't judge this themselves – and question corporate efficiency including senior salaries
  - While NFP gives reassurance that shareholders are not profiteering, some customers want to know that it is held to account - as a profit-making organisation would be
  - Equally, high bills relative to the rest of the industry could indicate operational inefficiencies

*They seem to have some good ideas but don't see anything about grey water*  
Bangor DE

*They could earn money from other activities to supplement income rather than bill increases - in the same way universities gain extra income from parallel activities*  
Cardiff AB

## **Demonstrating future planning accommodates the needs of vulnerable customers:**

- Customers, including those in vulnerable circumstances, do not generally know about your existing work in this area – and the plan does not address vulnerability or affordability overtly
- This is potentially a missed opportunity

# Blue Marble Research

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