

## **Consumer Council for Water**

### **PR19 – Draft Determination Research**

#### **Phase 2 – Summary Reports**

#### **Executive Summary – Hafren Dyfrdwy (Wrexham)**

300 Hafren Dyfrdwy customers were interviewed via Computer Assisted Personal Interview (CAPI). Fieldwork dates ran from 6<sup>th</sup> August – 16<sup>th</sup> September 2019. Data were weighted in order to reflect the population of the Hafren Dyfrdwy customer base. All bill amounts shown to customers included forecast inflation. Customers were initially asked about the proposed change in the bill (uninformed responses), before being given information about the proposed service changes to consider alongside the bill change (informed responses).

In terms of the total bill change:

- Acceptability falls by 4% from 96% for uninformed responses to 92% for informed;
- Uninformed acceptability is mixed across the age groups, with those aged 45-59 most likely to find the uninformed total bill change acceptable (97%), with the lowest acceptability rating for those aged 16-29 and 75+ (94%):
  - At the informed level, those aged 16-29 saw the greatest decrease in acceptability from uninformed to informed, by 6pt;
- Just under three-fifths (57%) find the bill range for performance incentives acceptable.

#### **Summary of methodology**

A quantitative approach was adopted, with the all interviews conducted face to face using Computer Assisted Personal Interviews (CAPI). Data were weighted to match the customer profile of Hafren Dyfrdwy.

A full breakdown of sample groups is shown at the end of this report (page 9) and the questionnaire and showcards on the following pages.



**Uninformed  
acceptability  
(total change):**

**96%**

**Informed  
acceptability  
(total change):**

**92%**



**Summary of  
findings:**

**1:** Likelihood to find the proposed bill acceptable at the uninformed level is at highest for 45-59 year olds and lowest for the opposing ends of the age scale – 16-29 and 75+. The greatest decrease at the informed level is for 16-29 year olds with a decrease of 6pt.

**2:** Uninformed acceptability is 100% for all customers providing a household income (lower for those saying don't know or prefer not to say). The greatest change at the informed level is for those earning £30,000-£39,999, with a decrease of 12pt. Those earning £40,000 or more remain at 100% at the informed level.

**3:** There is little difference in acceptability at the uninformed level for metered and unmetered customers. However metered customers see a larger decrease at the informed level (minus 5pt) compared to their unmetered counterparts.

**4:** 100% of those not on the Priority Services Register find the proposed bill acceptable at the uninformed level but see a 11pt decrease at the informed level.

Uninformed acceptability (total change): demographics	% acceptable
<b>Age</b>	
16-29	94%
30-44	96%
45-59	97%
60-74	95%
75+	94%
<b>Household income</b>	
Up to £20,000	100%
£20,000 - £29,999	100%
£30,000 - £39,999	100%
£40,000 - £49,999	100%
£50,000 - £74,999	100%
£75,000+	100%
<b>Metered status</b>	
Metered	95%
Unmetered	96%
<b>Priority Services Register</b>	
On Priority Services Register	100%
Not on Priority Services Register	96%

Informed acceptability (total change): demographics	% acceptable (%pt. change vs. uninformed)
<b>Age</b>	
16-29	88% (-6)
30-44	94% (-2)
45-59	95% (-2)
60-74	90% (-5)
75+	89% (-5)
<b>Household income</b>	
Up to £20,000	96% (-4)
£20,000 - £29,999	97% (-3)
£30,000 - £39,999	88% (-12)
£40,000 - £49,999	100% (0)
£50,000 - £74,999	100% (0)
£75,000+	100% (0)
<b>Metered status</b>	
Metered	90% (-5)
Unmetered	95% (-1)
<b>Priority Services Register</b>	
On Priority Services Register	89% (-11)
Not on Priority Services Register	92% (-4)

	Proportion for Hafren Dyfrdwy	Range for WoCs	Average percentage for all WoCs	Average percentage for England and Wales
<b>Core indicators</b>				
<b>Uninformed acceptability of bill change 2019 – 2020</b>	96%	88% - 96%	92%	92%
<b>Uninformed acceptability (yearly from 2020 to 2025 change)</b>	95%	84% - 96%	90%	90%
<b>Uninformed acceptability (total bill change 2020 to 2025)</b>	96%	85% - 97%	91%	90%
<b>Informed acceptability (proposed plan and costs for water services)</b>	83%	82% - 96%	90%	91%
<b>Informed acceptability (proposed plan and costs for sewerage service)</b>	93%	76% - 95%	87%	87%
<b>Informed acceptability (combined plan)*</b>	92%	83% - 94%	89%	88%
<b>Acceptability (bill range for performance incentives)</b>	57%	57% - 89%	79%	80%
<b>Affordability</b>				
<b>Affordability of current water and sewerage charges (% agree)</b>	76%	62% - 80%	69%	69%
<b>Affordability of proposed water and sewerage charges (% agree)</b>	89%	75% - 92%	82%	81%
<b>Cost of living</b>				
<b>Changes in inflation aren't a particular concern for me (% agree)</b>	34%	22% - 38%	30%	29%
<b>It's hard to predict what level inflation is going to reach in the next few years (% agree)</b>	90%	77% - 90%	82%	82%

<b>Generally, my income doesn't keep up with changes in inflation (% agree)</b>	51%	43% - 63%	58%	58%
<b>I accept that all my household bills automatically include inflation (% agree)</b>	82%	64% - 82%	72%	71%
<b>I don't think about the effect of inflation on my bills (% agree)</b>	44%	25% - 44%	35%	34%
<b>I know that all of my bills change by inflation over time (% agree)</b>	83%	73% - 90%	85%	85%
<b>Likelihood of household income keeping up with changes in inflation over the next 5 years (% likely)</b>	41%	36% - 60%	44%	45%
<b>Water meters</b>				
<b>Metered (%)</b> - Asked for the meter	18%	13% - 24%	19%	19%
<b>Metered (%)</b> - Had no choice	30%	17% - 60%	35%	36%
<b>Unmetered (%)</b>	49%	16% - 60%	42%	41%

\*Customer services and other targeted services are also part of the plan

## Top reasons for finding proposed bills acceptable / unacceptable:

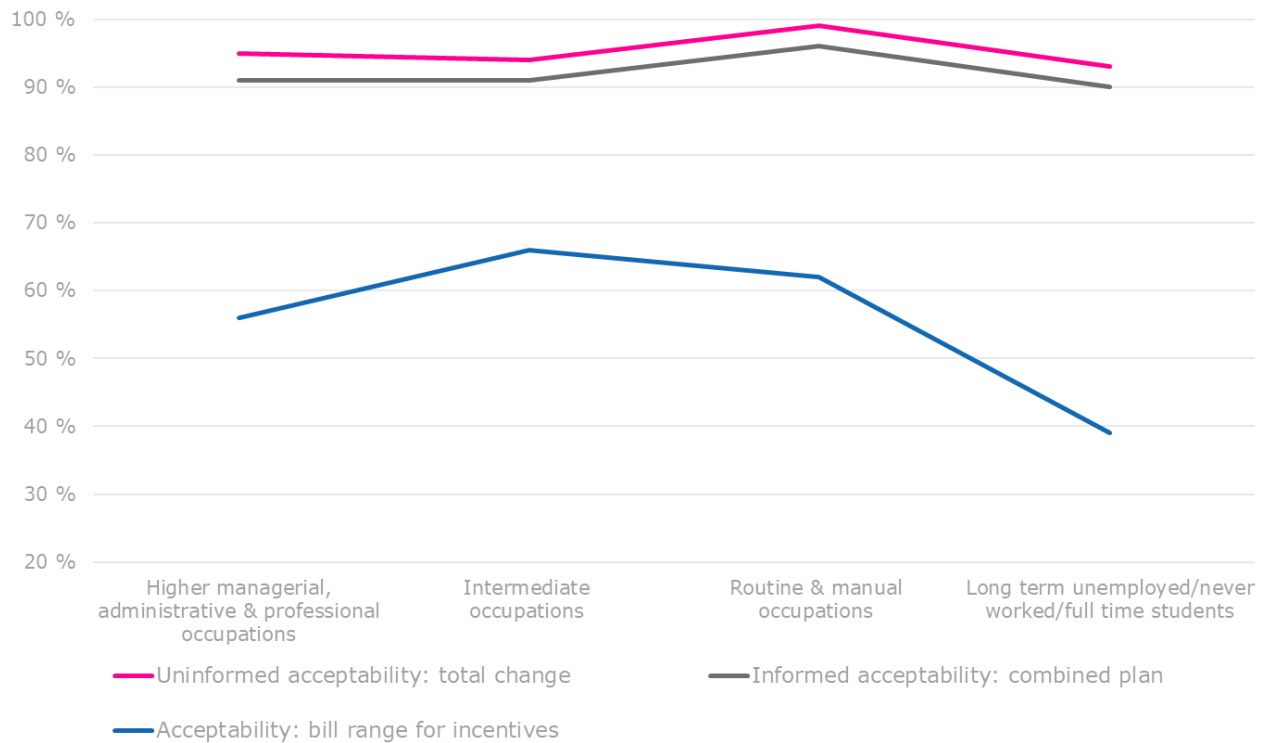
Top reasons for finding aspects of proposed bill change acceptable		Top reasons for finding aspects of proposed bill change unacceptable	
<b>Informed acceptability: water services</b>		<b>Informed acceptability: water services</b>	
There is little or no change to my bill	<b>39%</b>	Already too expensive/it will still be too expensive	<b>44%</b>
The plan is good value for money	<b>38%</b>	Company profits too high	<b>43%</b>
The plan seems to focus on the right services	<b>27%</b>	Because of the price increases	<b>38%</b>
<b>Informed acceptability: sewerage services</b>		<b>Informed acceptability: sewerage services</b>	
Because of the price decreases	<b>41%</b>	Already too expensive/it will still be too expensive	<b>39%</b>
The plan is good value for money	<b>40%</b>	Company profits too high / The company should be investing in their services as well as customers	<b>24%</b>
Their plans seem to focus on the right things	<b>25%</b>	Generally expect bigger service improvements / I don't trust them to make these improvements	<b>16%</b>
<b>Informed acceptability: combined plan</b>		<b>Informed acceptability: combined plan</b>	
I support what they are trying to do in the long term	<b>39%</b>	Company profits too high already	<b>49%</b>
Their plans seem to focus on the right things	<b>33%</b>	Already too expensive/it will still be too expensive	<b>48%</b>
The company provides a good service now and looks as if it will continue	<b>26%</b>	I expect better improvements for these prices	<b>19%</b>

Bill range for performance incentives	
It's good because this should help get even better service improvements because companies will try harder	<b>56% (of those rating it acceptable)</b>
It's good that the bill can reflect the level of service provided	<b>47% (of those rating it acceptable)</b>
The bill should be fixed and not be open to change as services change	<b>39% (of those rating it unacceptable)</b>
I disagree that bills should be linked with service performance	<b>36% (of those rating it unacceptable)</b>

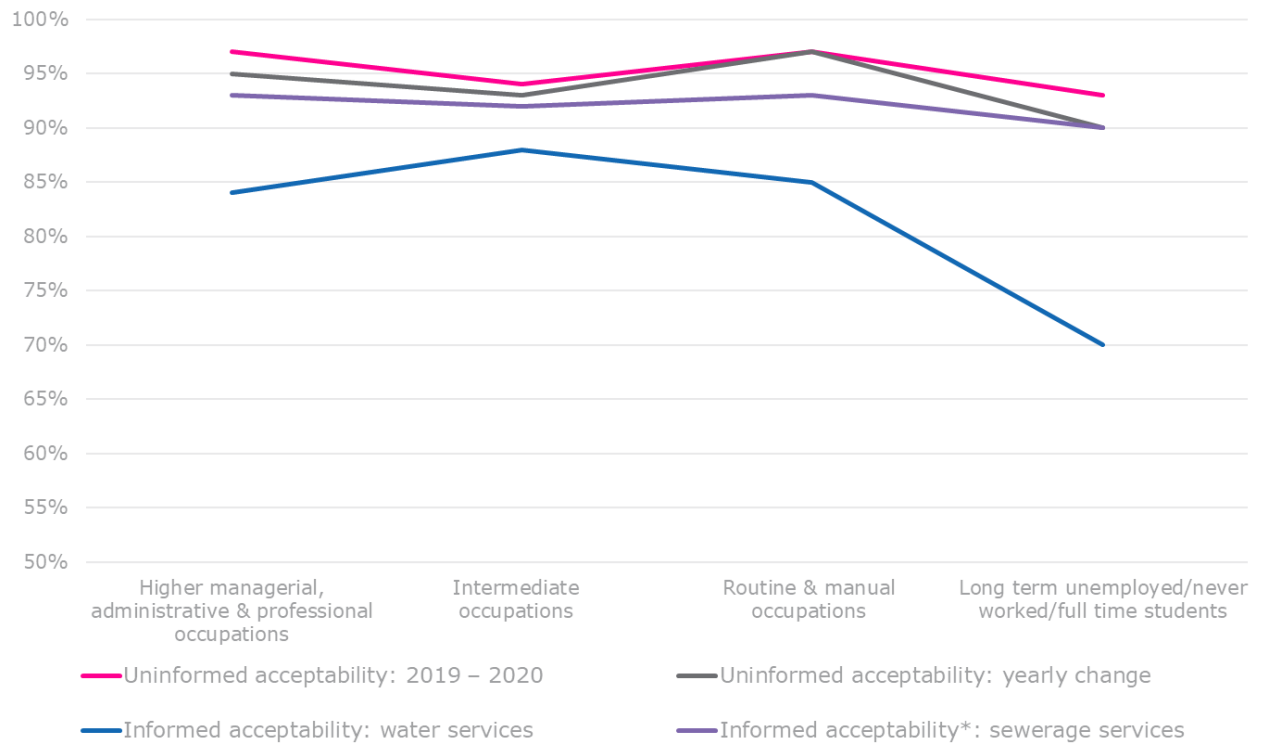
**At the uninformed stage, customers who provide an 'unacceptable' / 'completely unacceptable' rating at any of the three uninformed stages are asked an open question about why they provided that rating. The most common response is that bills are already too high (52%).**

**Fig 1: Total change acceptability and bill range for incentives by Socio Economic Classification:**



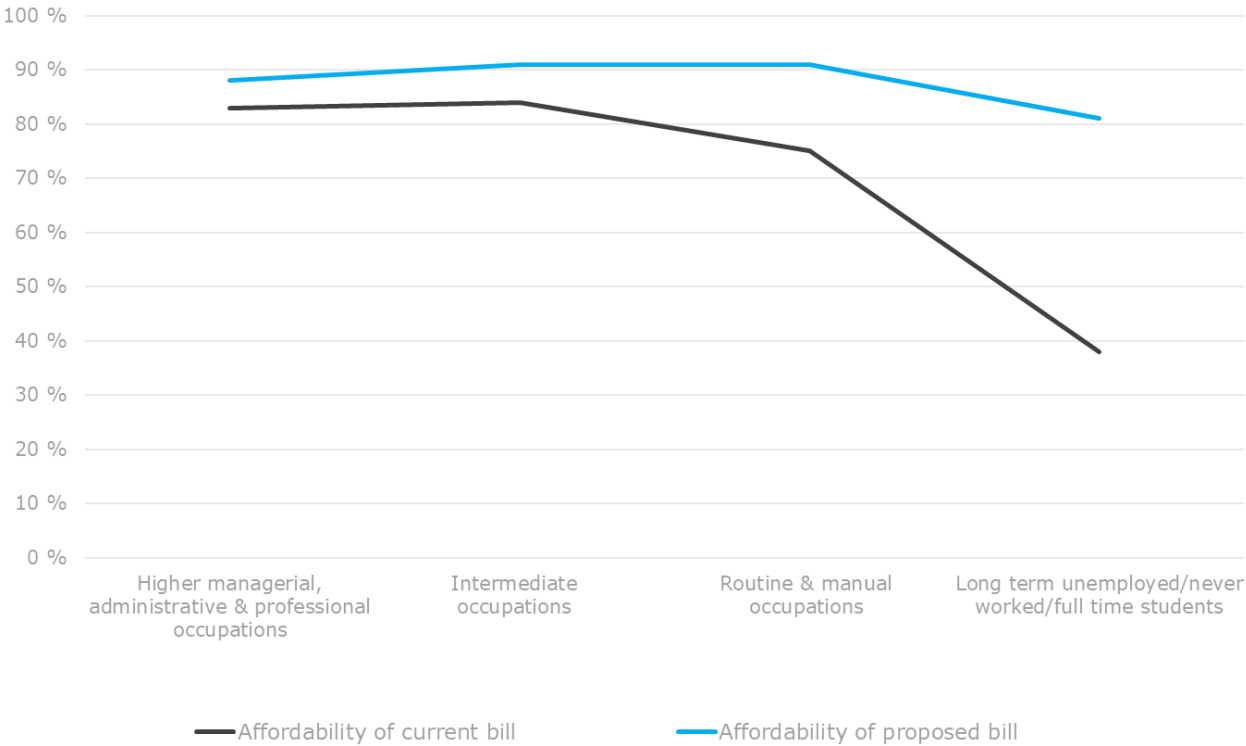
When looking at bill range acceptability for incentives, ratings for all groups are much lower than for uninformed and informed acceptability.

**Fig 2: Uninformed acceptability, 2019-20 and yearly change, and informed acceptability for water and sewerage charges:**



Uninformed acceptability for the change from 2019 to 2020 is lowest among the long term unemployed / never worked / full time students and those in intermediate occupations. When looking at yearly changes (at the uninformed level), those in higher managerial, administrative and professional occupations are significantly more likely to find the proposed bills acceptable than those who are long term unemployed / never worked / students.

**Fig 3: Affordability and Priority Services Register by Socio Economic Classification:**



Trends for each of the different Socio Economic Classification groups are similar for affordability of both the current bill and the proposed bill, as per the acceptability ratings.



## Sample profile: Hafren Dyfrdwy (300 interviews)

Demographics	Number of respondents
<b>Gender</b>	
Male	143
Female	157
<b>Age</b>	
16-29	18
30-44	55
45-59	74
60-74	98
75+	55
<b>Household size</b>	
Live alone	88
2	125
3	47
4	30
5+	10
Prefer not to say	0
<b>Anyone in the household with disabilities / conditions / recent life event</b>	
Yes	93
No	202
Prefer not to say	5
<b>SEC</b>	
Higher managerial, administrative & professional occupations	123
Intermediate Occupations	54
Routine & manual occupations	96
Not applicable Long term unemployed/never worked/student	27
<b>Household income</b>	
Up to £20,000	57
£20,000 - £29,999	35
£30,000 - £39,999	29
£40,000 - £49,999	15
£50,000 - £74,999	7
£75,000+	2
Prefer not to say / don't know	155

# Questionnaire

## CC Water PR19 DD Research



<b>Client name:</b>	CC Water
<b>Project name:</b>	PR19 Draft Determination Research
<b>Job number:</b>	5540
<b>Methodology:</b>	ONLINE/ CAPI
<b>Version</b>	12

### Notes on this document

- Instructions in **CAPS** are for computer programming
- Instructions in *italics* are for telephone interviewers
- **Bold** or underlined words are for emphasis within a question
- Different question types have different numbers:
  - Screener questions are labelled S01, S02, S03 etc.
  - Main survey questions are labelled Q01, Q02, Q03 etc.
  - Further demographic / classification questions are labelled C01, C02, C03 etc.
  - Number codes are included on each question for data processing purposes

## Introduction

### ***All Respondents:***

This research is being carried out by DJS Research Ltd on behalf of the [Consumer Council for Water](#) which is the consumer organisation working on behalf of customers of the water companies in England and Wales. The aim of the research is to find out what people think about plans for their [\[water and sewerage / water\]](#) company's services for 2020-2025 and how much they will cost.

You will need to know which water company or companies provide your water and sewerage services in order to complete this survey. This can be found on your current water and sewerage bill(s) and so it would be ideal if you could have your water and sewerage bill to hand.

Before you begin, we want to tell you that every five years, water and sewerage companies write a business plan setting out how they will meet drinking water, sewerage and environmental quality standards and deliver high quality customer service.

Ofwat (the regulator for the water industry), reviews each plan and sets investment and service levels, and the prices that companies can charge their customers for these services. This is your opportunity to have your say on proposals for your company's service levels and bills before Ofwat finalises them.

Please be assured that any answer you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society and none of your comments will be attributed to you personally. Any personal information we ask for is purely to classify your answers and will not be passed back to the Consumer Council for Water or any third parties for any marketing or sales purposes.

This survey should take no more than 15 minutes to complete.

Should you have any questions about the research please contact:  
Matt Prince at [mprince@djsresearch.com](mailto:mprince@djsresearch.com)

## ABOUT YOU

### Q01.

#### Base: All respondents

Are you solely or jointly responsible for paying the water and sewerage bill?

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No, I am not responsible for paying the bill		CLOSE

### Q02.

#### Base: All respondents

Please tell us which water company provides your water supply...

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Anglian Water		
2	Dee Valley Water		
3	Dŵr Cymru (Welsh Water)		
4	Northumbrian Water		
5	Hafren Dyfrdwy		
6	Hafren Dyfrdwy		
7	Southern Water		
8	South West Water		
9	Thames Water		
10	United Utilities		
11	Wessex Water		
12	Yorkshire Water		
13	Affinity Water (Central)		
14	Affinity Water (East)		
15	Affinity Water (Portsmouth)		
16	Bristol Water		
17	Cambridge Water		
18	Essex and Suffolk Water		
19	Hartlepool Water		
20	Hafren Dyfrdwy		
21	Bournemouth Water		
22	Hafren Dyfrdwy		
23	Hafren Dyfrdwy		
24	Sutton & East Surrey Water		
80	Other		THANK & CLOSE
85	Don't know		THANK & CLOSE

**Q03.****Base: All respondents coding Q02/2, 5 or 6**

And in which of the following do you live?

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Wrexham		
2	Powys		
3	Chester		

DP: Auto recode Q02 answer as follows: If Q03/1 or 2, code answer to Q02 as Hafren Dyfrdwy. If Q03/3 code answer to Q02 as Portsmouth.

**Q04.****Base: All respondents**

And please tell us which water company provides your sewerage service...

**IF CUSTOMER HAS SEPTIC TANK OR STATES 'OTHER' THANK AND CLOSE  
SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Anglian Water	Q02/1,13,14,17,18	
2	Dŵr Cymru (Welsh Water)	(Q02/3) or (Q03/1)	
3	Northumbrian Water	Q02/4,19	
4	Hafren Dyfrdwy	Q02/5	
5	Hafren Dyfrdwy	Q02/6,23	
6	Southern Water	Q02/7,15,20,21,22,24	
7	South West Water	Q02/8	
8	Thames Water	Q02/9,13,14,18,22,24	
9	United Utilities	Q02/10	
10	Wessex Water	Q02/11,16,21	
11	Yorkshire Water	Q02/12	
12	I have a septic tank		THANK & CLOSE
80	Other		THANK & CLOSE
85	Don't know		THANK & CLOSE

**INFO1.**

**Base: All respondents**

*If your water supply and sewerage services are provided by two different companies, please bear this in mind when giving your responses.*

**INFO PAGE**

**Q05.****Base: All respondents**

Are you currently charged for water through a water meter?

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		GO TO Q07
85	Don't know/ can't say		GO TO Q07

**Q06.****Base: All respondents who are charged through a water meter (Q03c/1)**

Why do you have a water meter installed at your home? *Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	It was already installed when I moved in		
2	I asked for one to be installed		
3	I had no choice – the company fitted it after I moved in		
80	Other (please specify)	OPEN TEXT BOX	
85	Don't know/ can't say		

**Q07.****Base: All respondents**

Please select the gender which you most identify yourself with...

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
3	Prefer to self describe as... (Please write in)		
86	Prefer not to say		

**Q08.****Base: All respondents**

And which of the following age groups do you fall into?

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	16-29		
2	30-44		
3	45-59		

4	60-74		
5	75+ years old		
86	Prefer not to say		

#### Q09.

**Base: All respondents**

Are you retired? *Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
3	Refused		

#### Q010.

**Base: All respondents**

Please answer the next set of questions based on your current job. If you're currently not working or are retired, please base your answers on your last job.

**Do you (did you) work as an employee or are you (were you) self-employed?**

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Employee		GO TO Q11
2	Self-employed with employees		GO TO Q12
3	Self-employed/freelance without employees		GO TO Q14
4	Not applicable - Long term unemployed/never worked		GO TO Q15
5	Not applicable - Full time student		GO TO Q15

#### Q011.

**Base: All code 1 (employees) at Q10 (Q10/1)**

How many people work (worked) for your employer at the place where you work (worked)?

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	1-24		GO TO Q13
2	25 or more		GO TO Q13

#### Q012.

**Base: All code 2 (self-employed with employees) at Q10 (Q10/2)**

How many people do (did) you employ?

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	1-24		GO TO Q13
2	25 or more		GO TO Q13

### Q013.

**Base: All code 1/2 (employees / self-employed with employees) at Q10 (Q10/1\_2)**

Do (did) you supervise the work of other employees on a day to day basis? (e.g. a supervisor, manager or foreman responsible for overseeing the work of other employees on a day to day basis)

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		GO TO Q14
2	No		GO TO Q14

### Q014.

**Base: All code 1/2/3 (employees / self-employed with employees / self-employed without employees) at Q10 (Q10/1\_3)**

What do you do for work? If you are not working now, what did you do in your last job?

#### SINGLE RESPONSE

CAPI ONLY: INTERVIEWER, IF RESPONDENT REFUSES READ OUT: I would like to reassure you that this information is only being collected to make sure we have a good mix of people included in the survey, it will not be used for any other purpose. On this basis would you be happy to tell me about the sort of work you do, or if you're not working now, what you did in your last job?

Code	Answer list	Scripting notes	Routing
1	Modern professional occupations such as: teacher – nurse – physiotherapist – social worker – welfare officer – artist – musician – police officer (sergeant or above) – software designer		
2	Clerical and intermediate occupations such as: secretary, personal assistant – clerical worker – office clerk – call centre agent – nursing auxiliary – nursery nurse		
3	Senior managers or administrators (usually responsible for planning, organising and co-ordinating work, and for finance) such as: finance manager – chief executive		



4	Technical and craft occupations such as: motor mechanic – fitter – inspector – plumber – printer – tool maker – electrician – gardener – train driver		
5	Semi-routine manual and service occupations such as: postal worker – machine operative – security guard – caretaker – farm worker – catering assistant – receptionist – sales assistant		
6	Routine manual and service occupations such as: HGV driver – van driver – cleaner – porter – packer – sewing machinist – messenger – labourer – waiter/waitress – bar staff		
7	Middle or junior managers such as: office manager – retail manager – bank manager – restaurant manager – warehouse manager – publican		
8	Traditional professional occupations such as: accountant – solicitor – medical practitioner – scientist – civil/mechanical engineer		
86	Refused		THANK AND CLOSE

**DP NOTE: IF QUOTAS NOT MET SHOW FOLLOWING SCREEN**

*Thank you for your answers. Today we're looking for certain types of people to answer our survey. Unfortunately, this means we are unable to continue.  
Please click the 'Finish Survey' button to complete the survey*

**Q015.**

**All respondents**

How much do you agree or disagree that the water and sewerage charges that you pay for are affordable to you?

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree/nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

**Q016.**

**All respondents**

How much do you currently pay for your water and sewerage services? This can be found

on your most recent bill. You should be able to see an amount for water services and a separate amount for sewerage services. Please look at your most recent bill and enter the two amounts in here, then specify how many months the bill covers [DP: Show four open numeric boxes, one for water amount and one for sewerage amount also show two open numeric boxes [MAX 12] one for water bill frequency and one for sewerage bill frequency].

[Only show if Hafren Dyfrdwy customer, Q03/1\_2] If the name of your water company has changed in the last 12 months, please think about the last bill you received.

OPEN RESPONSE: NUMERIC. CALCULATE A YEARLY FIGURE FOR WATER AND SEWERAGE USING OPEN BOX VALUES AND FREQUENCY

Code	OPEN TEXT BOX	Scripting notes	Routing
		OPEN NUMERIC BOX	
85	Don't know IF UNKNOWN USE AVERAGE BILL AMOUNT MOVING FORWARD		

If DK coded at Q016: Please note that the average water and sewerage bill is [INSERT AVERAGE BILL FOR WATER COMPANY]. You will be asked a number of questions throughout this survey based on this average yearly bill.

#### Q017.

**All respondents not code 85 (don't know) at Q16**

You've said that your current overall bill is [SHOW FIGURE GIVEN at Q16] – can you confirm that this is for [SHOW NUMBER OF MONTHS ENTERED AT Q16] months?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No - return to previous question to re-enter the amount		

#### Q018.

**All respondents not code 85 (don't know) at Q16**

Is this from a bill or is this your best estimate?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	From a bill		
2	Best estimate		

**UNINFORMED ACCEPTABILITY**

## INFO2.

**Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)**

The next set of questions are about proposed changes to your water and sewerage bill from the years 2020 to 2025. You will be shown a number of different figures relating to bill changes. Each of these changes include forecast inflation of 2% a year in line with current Treasury estimates. Please read the information about inflation below before continuing.

Inflation is the rate of increase in prices for goods and services over time and it is included in all utility bills. So, if inflation is 2% in 12 months time, 4 pints of milk which are £1 now will now cost £1.02. Bear in mind that your household income (e.g. wages, benefits, state pensions, etc.) also changes each year. If it keeps up with inflation then, all other things being equal, it will match the increase in the cost of goods and services. If your household income goes up by more than inflation each year, it will generally feel like it is going further. If it doesn't keep up with inflation, it may not feel as though it going as far as it used to.

**[CAPI ONLY]** Please note, if you would like to refer back to this information at any point, please ask your interviewer.

We would like you to imagine that it is now the year 2020 and you have just received your bill for water and sewerage services. Please answer the following question in terms of how you would feel based on the following...

*Last year (2019) your bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your bill for the year is £[pull through with calculation based on current bill and 2020 formula].*

**DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WaSCs: ANGLIAN WATER, HAFREN DYFRDWY (POWYS), PORTSMOUTH, SOUTH WEST WATER, SOUTHERN WATER, THAMES WATER, UNITED UTILITIES, WESSEX WATER, YORKSHIRE WATER, WELSH WATER, NORTHUMBRIAN WATER**

## INFO PAGE

### Q019.

**Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)**

How acceptable or unacceptable to you is the proposed change in your bill from 2019 to 2020? *Please choose one answer only*

## SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		

4	Completely unacceptable		
85	Don't know/ can't say		

#### Q020.

**Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)**

This screen is now showing how your bill could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE
Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P

Now, thinking about **how the bill changes each year** from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

#### Q021.

**Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)**

Thinking about the total bill increase/decrease of [INSERT TOTAL CHANGE FIGURE FROM Q20] from 2020 to 2025, how acceptable or unacceptable is this to you?

*Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		

2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

### Q022.

**Base: All respondents who code 3 or 4 at any of Q19 / Q20 / Q21**

You have said that one or more aspects of the bill change are unacceptable to you. Could you say why this is the case?

*Please answer in the box below*

### OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
1		OPEN TEXT BOX	
85	Don't know/ can't say		

### INFO3.

**Base: WoC customers only (Q02/13-24 and Q03/1)**

As you get your water and sewerage services from two different companies, we are going to ask you about the bill for each service separately. When answering these questions, please think about the charge for each service separately – we will ask you about the overall bill for both services later on.

The next set of questions are about proposed changes to your **water** bill from the years 2020 to 2025. You will be shown a number of different figures relating to bill changes. Each of these changes include forecast inflation of 2% a year in line with current Treasury estimates. Please read the information about inflation below before continuing.

Inflation is the rate of increase in prices for goods and services over time and it is included in all utility bills. So, if inflation is 2% in 12 months time, 4 pints of milk which are £1 now will now cost £1.02. Bear in mind that your household income (e.g. wages, benefits, state pensions, etc.) also changes each year. If it keeps up with inflation then, all other things being equal, it will match the increase in the cost of goods and services. If your household income goes up by more than inflation each year, it will generally feel like it is going further. If it doesn't keep up with inflation, it may not feel as though it going as far as it used to.

**[CAPI ONLY]** Please note, if you would like to refer back to this information at any point, please ask your interviewer.

Thinking about your household bill for clean **water services**, we would like you to imagine that it is now the year 2020. Please answer the following question in terms of how you would feel based on the following...

Last year (2019) your bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your water bill for the year is £[pull through with calculation based on current bill and 2020 formula].

DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WoCs: AFFINITY WATER, BRISTOL WATER, CAMBRIDGE WATER, HAFREN DYFRDWY (WREXHAM), HARTLEPOOL WATER, HAFREN DYFRDWY, BOURNEMOUTH WATER, HAFREN DYFRDWY, HAFREN DYFRDWY, SUTTON & EAST SURREY WATER, ESSEX AND SUFFOLK WATER

## INFO PAGE

### Q023.

**Base: WoC customers only (Q02/13-24 and Q03/1)**

How acceptable or unacceptable to you is the proposed change in your water bill from 2019 to 2020? *Please choose one answer only*

## SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

### Q024.

**Base: WoC customers only (Q02/13-24 and Q03/1)**

This screen is now showing how your household bill for **water** could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE
Text to be pulled through based on their water bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P

Now, thinking about **how the water bill changes each year** , from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

**Q025.**

**Base: WoC customers only (Q02/13-24 and Q03/1)**

Thinking about the water bill increase/decrease of **[INSERT TOTAL CHANGE FIGURE FROM Q24]** from 2020 to 2025, how acceptable or unacceptable is this to you?

*Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

**INFO4.**

**Base: WoC customers only (Q02/13-24 and Q03/1)**

Now, thinking just about the **sewerage** part of your bill, we would like you to imagine that it is now the year 2020. Please answer the following question in terms of how you would feel based on the following...

*Last year (2019) your sewerage bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your sewerage bill for the year is £[pull through with calculation based on current bill and 2020 formula].*

**DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WoCs FOR THEIR SEWERAGE COMPANY: THAMES WATER, ANGLIAN WATER, SOUTHERN WATER, WESSEX WATER, WELSH WATER, NORTHUMBRIAN WATER, PORTSMOUTH**

**INFO PAGE**

**Q026.**

**Base: WoC customers only (Q02/13-24 and Q03/1)**

How acceptable or unacceptable to you is the proposed change in your sewerage bill from 2019 to 2020? *Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

**Q027.**

**Base: WoC customers only (Q02/13-24 and Q03/1)**

This screen is now showing how your household bill for **sewerage** could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE
Text to be pulled through based on their sewerage bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P

Now, thinking about **how the sewerage bill changes each year**, from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

**Q028.**

**Base: WoC customers only (Q02/13-24 and Q03/1)**

Thinking about the sewerage bill increase/decrease of **[INSERT TOTAL CHANGE FIGURE FROM Q27]** from 2020 to 2025, how acceptable or unacceptable is this to you?

*Please choose one answer only*



## SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

### INFO5.

#### Base: WoC customers only (Q02/13-24 and Q03/1)

You have just said how acceptable the water and sewerage parts of your bill will be to you. Now, we would like you to think about what your **combined water and sewerage** bill will look like and we would like you to imagine the following...

*Last year (2019) your bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your water and sewerage bill for the year is £[pull through with calculation based on current bill and 2020 formula].*

DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WoCs

## INFO PAGE

### Q029.

#### Base: WoC customers only (Q02/13-24 and Q03/1)

How acceptable or unacceptable to you is the proposed change in your combined water and sewerage bill from 2019 to 2020? *Please choose one answer only*

## SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

### Q030.

#### Base: WoC customers only (Q02/13-24 and Q03/1)

This screen is now showing how your combined household bill for **water and sewerage** could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE
--	------	------	------	------	------	------	--------------

Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P
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Now, thinking about **how the combined bill for water and sewerage changes each year**, from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

#### Q031.

**Base: WoC customers only (Q02/13-24 and Q03/1)**

Thinking about the total bill increase/decrease of [INSERT TOTAL CHANGE FIGURE FROM Q30] from 2020 to 2025, how acceptable or unacceptable is this to you?

*Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

#### Q032.

**Base: All respondents who code 3 or 4 at any of Q29 / Q30 / Q31**

You've said that one or more aspects of the bill change are unacceptable to you. Could you say why this is the case?

*Please answer in the box below*

#### OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
1		OPEN TEXT BOX	

85	Don't know/ can't say		
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## INFORMED ACCEPTABILITY

### INFO6.

#### Base: All respondents

Now we are going to show you how your water and sewerage services could change from 2020 to 2025. We would like to know how acceptable or unacceptable the proposed service changes are to you.

So, the next questions are about the **services** provided by <WaSCs: ANSWER GIVEN AT Q2> / <WoCs: ANSWER GIVEN AT Q2 which provides your water supply and ANSWER GIVEN AT Q4 which provides your sewerage services>.

When answering questions, please bear in mind that because you are charged for two services i.e. for water and for sewerage, you will be asked to consider these individually as there are different service levels and prices for each.

The information on the following pages shows the different water services provided by [ANSWER GIVEN AT Q2], and what they plan to improve or maintain between 2020 and 2025. Please note that the investment details shown are a snapshot of the proposals; if there is no detail shown it doesn't mean that the company isn't investing in that area.

The table also shows the total price change starting with the 2020 bill through to 2025, including inflation. When considering the price please bear in mind that your household income and inflation will also change over the next 5 years.

### INFO PAGE

### Q033.

#### Base: All respondents

DP: SHOWCARD A [WATER SUPPLY PLANS FOR 2020-2025]

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their individual water bill amount	£.p	£.p	£.p	£.p	£.p	£.p

Bearing in mind the investment and service levels that go with this, how acceptable or unacceptable do you think the proposed price changes are for the **water** services? Please choose one answer only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

#### Q034.

**Base: All respondents who code 3 or 4 at Q33**

What are the two main reasons that you feel the proposals for your water services are unacceptable?

*Please choose up to two answers only*

**MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST**

Code	Answer list	Scripting notes	Routing
1	Already too expensive/it will still be too expensive		
2	Company profits too high		
3	Generally, expect bigger service improvements		
4	Companies should pay for service improvements out of their profits		
5	I expect better improvements for these prices		
6	The plan is poor value for money		
7	Compared to energy prices it is more expensive		
8	I am dissatisfied with current services & expected greater improvements		
9	Because of the price increases	ONLY SHOW IF BILL INCREASES	
10	Their plans don't focus on the right services		
11	I expect better improvements for these prices because Dŵr Cymru Welsh Water has no shareholders and therefore there should be more money to re-invest in the services	ONLY SHOW TO Q02/3 [WELSH WATER]	
12	I won't be able to afford this		
13	I don't trust them to make these service improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

#### Q035.

**Base: All respondents who code 1 or 2 at Q33**

What are the two main reasons that you feel the proposals for your water supply are acceptable?

*Please choose up to two answers only*

**MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST**

Code	Answer list	Scripting notes	Routing
1	The plan is good value for money		
2	Compared to energy prices it's cheaper		
3	Their plans seem to focus on the right services		
4	The company provides a good service now and it looks as if it will continue		
5	I support what they are trying to do in the long term		
6	There is little or no change to my bill		
7	I don't really understand it but I trust them to do what's best for customers		
8	I have been dissatisfied with the service recently but am pleased that they are making improvements		
9	Because of the price decreases	ONLY SHOW IF BILL DECREASES	
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

**INFO6.**

**Base: All respondents**

The following pages show the different sewerage services provided by [ANSWER GIVEN AT Q4], and what they plan to improve or maintain between 2020 and 2025. Please note that the investment details shown are a snapshot of the proposals; if there is no detail shown it doesn't mean that the company isn't investing in that area.

The table also shows the total price change starting with the 2020 bill through to 2025, including inflation. When considering the price please bear in mind that your household income and inflation will also change over the next 5 years.

**INFO PAGE**

**Q036.**

**Base: All respondents**

**DP: SHOWCARD B [WATER SEWERAGE & OTHER SERVICES PLANS FOR 2020-2025]**

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their individual sewerage bill amount	£.p	£.p	£.p	£.p	£.p	£.p

Bearing in mind the investment and service levels that go with this, how acceptable or unacceptable do you think the proposed price changes are for **sewerage** services?

*Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

### Q037.

**Base: All respondents who code 3 or 4 at Q36**

What are the two main reasons that you feel the proposals for your sewerage services are unacceptable?

*Please choose up to two answers only*

**MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST**

Code	Answer list	Scripting notes	Routing
1	Already too expensive/it will still be too expensive		
2	Company profits too high already		
3	Generally, expect bigger service improvements		
4	The company should be investing in their services as well as customers		
5	I expect better improvements for these prices		
6	The plan is poor value for money		
7	Compared to energy prices it is more expensive		
8	I am dissatisfied with current services & expected greater improvements		
9	Because of the price increases	<b>ONLY SHOW IF BILL INCREASES</b>	
10	Their plans don't focus on the right services		

11	I won't be able to afford this		
12	I don't trust them to make these service improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

### Q038.

#### Base: All respondents who code 1 or 2 at Q36

What are the two main reasons that you feel the proposals for your sewerage services are acceptable?

*Please choose up to two answers only*

**MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST**

Code	Answer list	Scripting notes	Routing
1	The plan is good value for money		
2	Compared to energy prices it's cheaper		
3	Their plans seem to focus on the right things		
4	The company provide a good service now and it looks as if it will continue		
5	I support what they are trying to do in the long term		
6	There is little or no change to my bill		
7	I don't really understand it but I trust them to do what's best for customers		
8	I have been dissatisfied with the service recently but am pleased that they are making improvements		
9	Because of the price increases	ONLY SHOW IF BILL INCREASES	
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

### INFO7.

#### Base: All respondents

WaSCs only

Now you have seen all the proposed service changes for your water and sewerage services, we want to tell you that there are also some service changes relating to customer services and other specific services that need to be taken into account.

### WoCs only

Now you have seen all the proposed service changes for your water and sewerage services, we want to tell you that there are also some service changes relating to customer services and other specific services that need to be taken into account.

### All respondents

Changes to these services *are shown on the following pages.*

### INFO PAGE

#### Q039.

**Base: All respondents**

**DP: SHOWCARD C [OTHER SERVICES FOR 2020-2025] ALONG WITH PRICE CHANGES FOR 2020-2025**

*Please review the proposed price changes for the combined water and sewerage bill.*

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p

Bearing in mind the investment and service levels that go with this, how acceptable or unacceptable do you think the proposed price changes are for water and sewerage services?

*Please choose one answer only*

### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

#### Q040.



**Base: All respondents who code 3 or 4 at Q39**

What are the two main reasons that you feel the proposals for your water and sewerage services are unacceptable?

*Please choose up to two answers only*

**MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST**

Code	Answer list	Scripting notes	Routing
1	Already too expensive/it will still be too expensive		
2	Company profits too high already		
3	Generally, expect bigger service improvements		
4	The company should be investing in their services as well as customers		
5	I expect better improvements for these prices		
6	The plan is poor value for money		
7	Compared to energy prices it is more expensive		
8	I am dissatisfied with current services and expected greater improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

**Q041.****Base: All respondents who code 1 or 2 at Q39**

What are the two main reasons that you feel the proposals for your water and sewerage services are acceptable?

*Please choose up to two answers only*

**MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST**

Code	Answer list	Scripting notes	Routing
1	The plan is good value for money		
2	Compared to energy prices it's cheaper		
3	Their plans seem to focus on the right things		
4	The company provide a good service now and it looks as if it will continue		
5	I support what they are trying to do in the long term		
6	There is little or no change to my bill		
7	I don't really understand it but I trust them to do what's best for customers		

8	I have been dissatisfied with the service recently but am pleased that they are making improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

#### Q042.

**Base: All WaSC respondents (Q02/1\_12)**

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p

How much do you agree or disagree that the proposed water and sewerage charges from 2020 to 2025 are affordable to you?

*Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

#### Q043.

**Base: All WoC respondents (Q02/13\_24 OR Q03/1)**

	2020	2021	2022	2023	2024	2025
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Text to be pulled through based on their total bill amount	£.p	£.p	£.p	£.p	£.p	£.p
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How much do you agree or disagree that the proposed **combined water and sewerage charges** (i.e. your total bill amount) from 2020 to 2025 are affordable to you?

*Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

## ODI Section

### Q044.

#### Base: All WaSC respondents (Q01/12)

We have just shown you the baseline service plan and charges proposed for your water and sewerage services from 2020 to 2025.

Sometimes, the level of service customers get is different to this baseline plan. It could be lower than in the plan, for example, because extreme weather affected water supplies or caused flooding, or the service level could end up being better because new technology means the company has become more efficient. By 2022, it will be clear whether your company is providing a service which is better or worse than planned, and your bill could change to reflect this.

### SHOWCARD D

If [**insert water company from Q02/1-12**] **did not meet any of these service levels**, and gave you notably lower service levels than in their plan, your annual water and sewerage bill from 2022 onwards, including inflation, would go down by up to £xxx.

On the other hand, if [**insert water company from Q02/1-12**] **exceeds all of these service levels** to give you notably better service levels than in their plan, your annual water and sewerage bill from 2022, including inflation, would go up, by up to £xxx.

In practice, it's unlikely that your company would either miss all of it's service level targets, or exceed them all. Experience is that companies miss some, beat others, or are so close to the planned service level that it makes no change to the bill. So it's more likely that your bill would end up being **closer to the middle rather than at the**

**bottom of the range ([pull through from bottom]) or at the top ([pull through from top]).**

Thinking about this, could you please state how acceptable or unacceptable the potential bill for lower and higher service levels is to you? Please remember that your household income will also change over the five years from 2020 to 2025 – it may change in line with inflation, by less than inflation, or increase by more than inflation.

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know		

#### Q045.

**Base: All respondents who code 1-4 at Q044**

Why do you say that? Please choose as many of the options below that fit your view

#### MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	The bill should be fixed and not be open to change as services change	Only show if coding 3-4 @ Q44	
2	I disagree that bills should be linked with service performance	Only show if coding 3-4 @ Q44	
3	The company should be penalised in other ways if they under achieve on services	Only show if coding 3-4 @ Q44	
4	The company should be rewarded in other ways if they over achieve on services	Only show if coding 3-4 @ Q44	
5	It's good that the bill can reflect the level of service provided	Only show if coding 1-2 @ Q44	
6	It's good because this should help get even better service improvements because companies will try harder	Only show if coding 1-2 @ Q44	
7	Uncertainty about how the bill could change each year makes budgeting for it difficult and I don't know if I'll be able to afford it	Only show if coding 3-4 @ Q44	
8	Other – please write in		
85	Don't know		

#### Q046.

## Base: All WoC respondents (Q02/13-24 OR Q03/1)

We have already shown you the baseline service plan and charges proposed for your water services starting from the next bill in 2020 through to 2025.

Sometimes, the level of service customers get ends up being different to what has been planned. Performance against targets could end up being worse, for example, because extreme weather affected water supplies or caused flooding, or could end up being better because new technology means the company has become more efficient. By 2022, it will be clear whether your company is providing a service which is better or worse than planned, and your bill could change to reflect this.

### SHOWCARD D

If [**insert water company from Q02/13-22 or 24 OR Q02a/1**] **did not meet any of these service levels**, and gave you notably lower service levels than in their plan, your annual water bill from 2022 onwards, including inflation, would go down by up to £xxx.

On the other hand, if [**insert water company from Q02/13-22 or 24 OR Q02a/1**] **exceeds all of these service levels** to give you notably better service levels than in their plan, your annual water bill from 2022, including inflation, would go up by up to £xxx.

In practice, it's unlikely that your company would either miss all of its service level targets, or exceed them all. Experience is that companies miss some, beat others, or are so close to the planned service level that it makes no change to the bill. So it's more likely that your bill would end up being towards the middle of this range than at the bottom or top.

Thinking about this, could you please state how acceptable or unacceptable this potential range that your bill could fall into is to you as a customer? Please remember that your household income will also change over the five years from 2020 to 2025. If it keeps up with inflation it should match the increase in cost of goods and services over time.

### TEXT FOR HAFREN DYFRDWY CUSTOMERS ONLY (Q02/23)

If Hafren Dyfrdwy did not meet any of these service levels, and gave you notably lower service levels than in their plan, your water bill, including inflation, could go down. On the other hand, if they exceeded all of these service levels and gave you notably better service levels than in their plan, your water bill could go up to reflect this higher level of service. Your bill could increase by up to £2.50 a year, and go down by up to £3 a year

However, Hafren Dyfrdwy propose to keep their water bills the same from 2020 to 2025 and apply any difference in the bills they could have charged from 2026 onwards – which will depend on how good their service performance was from 2020-2025. So from 2020-2025, the average household water bill will be unchanged, regardless of performance and the effect of inflation, at £xxx

Thinking about this, could you please state how acceptable or unacceptable this is to you?

## SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know		

### Q047.

#### Base: All respondents who code 1-4 at Q046

Why do you say that? Please choose as many of the options below that fit your view

## MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	The bill should be fixed and not be open to change as services change	Only show if coding 3-4 @ Q46	
2	I disagree that bills should be linked with service performance	Only show if coding 3-4 @ Q46	
3	The company should be penalised in other ways if they under achieve on services	Only show if coding 3-4 @ Q46	
4	The company should be rewarded in other ways if they over achieve on services	Only show if coding 3-4 @ Q46	
5	It's good that the bill can reflect the level of service provided	Only show if coding 1-2 @ Q46	
6	It's good because this should help get even better service improvements because companies will try harder	Only show if coding 1-2 @ Q46	
7	Uncertainty about how the bill could change each year makes budgeting for it difficult and I don't know if I'll be able to afford it	Only show if coding 3-4 @ Q46	
8	I'd worry that saving up all these bill changes until 2026 might have a big effect on the bill	Only show if code 23 @ Q03 (Hafren Dyfrdwy)	
9	I'd prefer the bill to be flat for a few years, and for it to change from 2026 onwards than for it to change each year	Only show if code 23 @ Q03 (Hafren Dyfrdwy)	
86	Other – please write in		
85	Don't know		

**Q048.****Base: All WoC respondents (Q02/13-24 OR Q03/1)**

We have already shown you the baseline service plan and charges proposed for your sewerage starting from your bill in 2020 through to 2025.

Sometimes, the level of service customers get ends up being different to what has been planned. Performance against targets could end up being worse, for example, because extreme weather affected water supplies or caused flooding, or could end up being better because new technology means the company has become more efficient. By 2022, it will be clear whether your company is providing a service which is better or worse than planned, and your bill could change to reflect this.

**SHOWCARD D - VISUAL EXAMPLE HERE**

If [**insert sewerage company from Q03**] **did not meet any of these service levels**, and gave you notably lower service levels than in their plan, your annual sewerage bill from 2022 onwards, including inflation, would go down by up to £xxx.

On the other hand, if [**insert sewerage company from Q03**] **exceeds all of these service levels** to give you notably better service levels than in their plan, your annual sewerage bill from 2022, including inflation, would go up by up to £xxx.

In practice, it's unlikely that your company would either miss all of its service level targets, or exceed them all. Experience is that companies miss some, beat others, or are so close to the planned service level that it makes no change to the bill. So it's more likely that your bill would end up being towards the middle of this range than at the bottom or top.

Thinking about this, could you please state how acceptable or unacceptable this potential range that your bill could fall into is to you as a customer? Please remember that your household income will also change over the five years from 2020 to 2025. If it keeps up with inflation it should match the increase in cost of goods and services over time.

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know		

**Q049.****Base: All respondents who code 1-4 at Q048**

Why do you say that? Please choose as many of the options below that fit your view

**MULTI RESPONSE**

Code	Answer list	Scripting notes	Routing
1	The bill should be fixed and not be open to change as services change	Only show if coding 3-4 @ Q48	
2	I disagree with linking bills to company service performance	Only show if coding 3-4 @ Q48	
3	The company should be penalised in other ways if they under achieve on services	Only show if coding 3-4 @ Q48	
4	The company should be rewarded in other ways if they over achieve on services	Only show if coding 3-4 @ Q48	
5	It's good that the bill can reflect the level of service provided	Only show if coding 1-2 @ Q48	
6	It's good because this should help get even better service improvements as companies will try harder	Only show if coding 1-2 @ Q48	
7	Uncertainty about how the bill could change each year makes budgeting for it difficult and I don't know if I'll be able to afford it	Only show if coding 3-4 @ Q48	
8	I'd worry that saving up all these bill changes until 2026 might have a big effect on the bill	Only show if code 23 @ Q03 (Hafren Dyfrdwy)	
9	I'd prefer the bill to be flat for a few years, and for it to change from 2026 onwards than for it to change each year	Only show if code 23 @ Q03 (Hafren Dyfrdwy)	
86	Other – please write in		
85	Don't know		

### Q050.

#### Base: All respondents

To what extent do you agree or disagree with each of the following statements about inflation and household bills?

*Please choose one answer only per statement*

**SINGLE RESPONSE PER STATEMENT, GRID, RANDOMISE ORDER OF STATEMENTS**

Code	Row	Scripting notes	Routing
1	I accept that all my household bills automatically include inflation		
2	Generally, my income doesn't keep up with changes in inflation		
3	Changes in the inflation rate aren't a particular concern for me		
4	I don't think about the effect of inflation on my bills		
5	I know that all of my bills change by inflation over time		



6	I think it's hard to predict what level inflation is going to reach in the next few years		
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Code	Column	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

### Q051.

#### Base: All respondents

And looking ahead, how likely do you think it is that your household income is generally going to keep up with changes in inflation on household bills, food, entertainment etc. over the next 5 years?

*Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very likely		
2	Fairly likely		
3	Neither likely nor unlikely		
4	Fairly unlikely		
5	Very unlikely		
85	Don't know		

### Q052.

#### Base: All respondents

Why do you say that?

*Please answer in the box below*

#### OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
		OPEN TEXT BOX	
85	Don't know		

### Q053.

#### Base: All respondents

Which of the following best describes your financial position?

*Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
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1	I do not have problems paying my water bill		
2	It is difficult to pay my bill but I always pay it on time		
3	It is difficult to pay my bill and I sometimes pay it late		
4	It is difficult to pay my bill and I never pay it on time		
85	Don't know		
86	I would rather not say		

#### Q054.

##### Base: All respondents

We would like to make sure that we take account of the views of people of all incomes.

Could you tell me which of the following income bands your household falls into?

Please take account of the income of all those in the household (before tax and national insurance) and include any pensions, benefits or extra earnings

*Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Less than £10,000		
2	£10,000 to £19,999		
3	£20,000 to £29,999		
4	£30,000 to £39,999		
5	£40,000 to £49,999		
6	£50,000 to £74,999		
7	£75,000 to £99,999		
8	£100,000 or more		
85	Don't know		
86	Prefer not to say		

#### Q055.

##### Base: All respondents

Including yourself, how many adults, i.e. 18 years or over, are there in your household?

And how many children, i.e. under 18 years old and under 5 years, are there in your household?

#### SINGLE RESPONSE GRID

Code	List	Scripting notes	Routing
1	Adults (i.e. people aged 18 or over)	MINIMUM ONE @ ANSWER LIST	
2	Children aged 6-17		
3	Children aged 0-5		

Code	Answer list	Scripting notes	Routing
1	None		
2	One		

3	Two		
4	Three		
5	Four		
6	Five or more		
86	Prefer not to say		

### Q056.

#### Base: All respondents

Could you please tell me which, if any, of the following disabilities, conditions or life events you or someone in your household may be experiencing?

*Please choose as many as apply*

#### MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Serious/ Chronic Illness		
2	Poor mobility e.g. physical impairment, restricted movement		
3	Blind/partially sighted/ have a hearing difficulty		
4	Communication/speech difficulties		
5	Have dementia, cognitive impairment, loss of mental capacity (due to injury or illness) or a developmental condition		
6	Have a mental health condition/mental disability or chronic anxiety/depression		
7	Temporarily recovering after being in hospital or having an operation		
8	Recovering after a traumatic event (e.g a bereavement, recent child birth, divorce, loss of job or other stressful event)		
9	Recovering after an accident, injury or serious illness		
10	Living with an alcohol or substance addition/abuse		
11	High water use due to a medical condition (e.g. kidney dialysis, skin conditions etc)		
80	Other ( <i>please write in here in as much detail as you are comfortable supplying</i> )		
87	Do not suffer with any disabilities	EXCLUSIVE	
85	Don't know	EXCLUSIVE	
86	Prefer not to say	EXCLUSIVE	

### Q057.

#### Base: All respondents

Are you on your water company's Priority Services Register? Priority services registers hold information about customers' needs for services like large print bills, or passwords, and also so that if there is a problem with their water supply, their supplier will know if they need bottled water, for example for a medical condition or if they can't get to a bottled water station.

*Please select one response only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
86	Prefer not to say		

#### Q058.

##### Base: All respondents

Have you experienced any issues with the water and sewerage services at your home which have affected your responses to this survey? *Please select one response only*

*Please select one response only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
86	Prefer not to say		

#### Q059.

##### Base: All code 2 at Q058

What were these experiences? *Please select one response only*

*Please select as many as apply*

#### MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Loss of water supply		
2	Inaccurate bills/meter readings		
3	Poor customer service		
4	Problems with sewerage/drainage services		
	Other - specify		
86	Prefer not to say		

#### Q060.

##### Base: All respondents

We are interested to know how easy to understand you found the information you have been presented with today.

*Please choose one answer only*

#### SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very easy to understand		
2	Quite easy to understand		
3	Quite difficult to understand		
4	Very difficult to understand		
85	Don't know		

#### Q061.

**Base: All respondents saying they don't understand (Q60/3-4)**

What didn't you understand? Please provide as much detail as you can. *Please answer in the box below*

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
		OPEN TEXT BOX	
85	Don't know		

#### Q062.

**Base: All respondents**

Do you have any further comments on anything you have read during this survey?

*Please answer in the box below*

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
		OPEN TEXT BOX	
85	Don't know		

#### Q063.

**Base: CAPI only**

Would you like to receive invitations to take part in future customer research from CCWater?

*Please choose one answer only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		

#### Q064.

**Base: all respondents**

What is your postcode? (Please note: your postcode like all the information you have provided in the questionnaire will remain strictly confidential and will be used for analysis purposes only. If you would prefer, you can provide only the first part of your postcode eg. LS16).

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
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		OPEN TEXT BOX	
86	Prefer not to say		

**Q065.**

**Base: CAPI only**

And finally, have you taken part in research on behalf of your water company in the past year, excluding this survey today?

*Please choose one answer only*

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		

**THANK YOU FOR YOUR HELP IN THIS RESEARCH**

*This research was conducted under the terms of the Market Research Society (MRS) code of conduct and is completely confidential. If you would like to confirm the Researchers credentials please call the MRS free on 0500 396999.*

*We would be grateful if you could provide your name and telephone number for quality control purposes. Please note that these will only be used by our quality control team and will not be passed onto any third parties*

# Showcards

## Shown at Q033:



Hafren Dyfrdwy supplies 97,000 households with water services and 24,500 with sewerage services, through 2,650km of water pipes and 510km of sewers and drains.

Hafren Dyfrdwy's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead supply pipes. It will reduce flooding from sewers and improve the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Hafren Dyfrdwy is investing £160 million in services from 2020 to 2025
- The average bill will increase by 4% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.



## Water services

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.  
How acceptable or unacceptable are the levels of service you see here?



WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 11 minutes and 40 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	15 megalitres per day in 2020	Leakage down 15% to 13 megalitres a day
Help people to use less water	Each person uses an average of 141 litres per day	Reduce to an average of 135 litres a day, 6 litres a day less
Reduce the number of burst water mains a year	126 per 1,000km of water main (253 in total)	110 per 1,000km of water main (222 in total)
Reduce the number of customer contacts about the taste, smell or colour of tap water	22 contacts per 10,000 population (490 in total) a year	14 contacts per 10,000 population (317 in total) a year
Replace more lead water supply pipes	0 pipes replaced from 2015 to 2020	230 pipes replaced from 2020 to 2025
Improving wildlife habitats on land owned by the company e.g. peat bogs in Berwyn Hills	0 hectares improved	450 hectares of upland peat bog in the Berwyn Hills improved from 2020 to 2025

## Shown at Q036:



Sewerage services in North-East Wales (Wrexham, Flintshire and Denbighshire) are provided by Dŵr Cymru Welsh Water with around 36,500km of sewers and drains across its sewerage service area.

Dŵr Cymru Welsh Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.



## Hafren Dyfrdwy sewerage: Welsh Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.  
How acceptable or unacceptable are the levels of service you see here?



SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2.1 homes in 10,000 affected (300 in total)	1.3 homes in 10,000 affected (188 in total)
Keep the number of collapsed sewers at a steady level	75 per 10,000km of sewers (274 in total)	72 per 10,000km of sewers (263 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	25 pollution incidents per 10,000km sewers (106 in total)	20 pollution incidents per 10,000km sewers (73 in total)
Reduce the number of properties and gardens at risk of repeated sewage flooding	368 properties & gardens in 2020	357 properties & gardens in 2025
Reduce sewage flooding of gardens or outbuildings	4,100 occasions a year	3,200 a year, a fall of 22.5%





Shown at Q039:



Hafren Dyfrdwy supplies 97,000 households with water services and 24,500 with sewerage services, through 2,650km of water pipes and 510km of sewers and drains.

Hafren Dyfrdwy's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead supply pipes. It will reduce flooding from sewers and improve the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Hafren Dyfrdwy is investing £160 million in services from 2020 to 2025
- The average bill will increase by 4% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

## Other services

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.

How acceptable or unacceptable are the levels of service you see here?



CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat
SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	1% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	50% of records are checked	90% of records are checked
Help more customers who struggle to afford their water bill	66% of struggling customers are helped	73% of struggling customers are helped
Ensure that all customers on the company's Priority Services Register are given help if the water supply to their property is ever disrupted	100% of registered customers	100% of registered customers



Shown at Q048:

## Performance incentives

As the regulator, Ofwat monitors the performance of water companies against their targets.

To encourage them to reach their targets, Ofwat instructs companies to develop performance incentives. These are based on;

1

**Missed service level targets → lower bills than the baseline plan**

Bills fall where targets are missed and a much lower service is given

2

**Exceeded service level targets → higher bills than the baseline plan**

Bills increase where targets are beaten and a much higher service is given