



PR19 Customer Acceptability Research: Wrexham wave 3

February 2019

Alex McCluckie
Associate Director

Faye Jasmine Waterhouse
Senior Research Executive

3 Pavilion Lane, Strines,
Stockport, Cheshire, SK6 7GH

+44 (0)1663 767 857
djsresearch.co.uk



JN 5507



Contents



pp.4-5	1. Background and objectives
pp.6-10	2. Methodology
pp.11-16	3. Executive Summary
pp.17-19	4. Agreement with the proposed plan of improvements
pp.20-23	8. Acceptability, without inflation (no chart shown)
pp.24-26	9. Acceptability, without inflation but with a chart shown
pp.27-30	10. Acceptability, with inflation and with a chart shown
pp.31-33	11. Affordability
pp.34-35	12. Views on ODI Mechanism: Penalties
pp.36-37	13. Views on ODI Mechanism: Rewards
pp.38-39	14. Water companies in the media
pp. 40	15. Appendix



Glossary of terms

Numerous abbreviations are used throughout this report. In order for the reader to have a quick reference point, a list of abbreviations used throughout is included here:

HD: Hafren Dyfrdwy

W: Wrexham

HH: Household

JAMS: Just About Managing

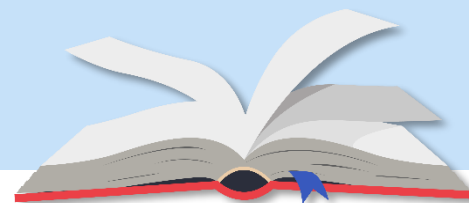
Those who sometimes struggle but usually manage to pay their household bills

Low income: Household income below £20,000 per annum

Health & wellbeing: Customers who either have a disability themselves or are in a household with someone who has a disability

Service experience: Customers who have experienced a service issue

***:** Indicates a low base size



1. Background & objectives

An outline of our
understanding of the
research requirements





Context & background

Hafren Dyfrdwy (HD) is preparing its business plan for 2020-2025. Within this process HD wants to put forward a truly customer centric plan, which delivers the service levels that customers care about, with bills that will be affordable for all.

As part of the process, HD wanted to give customers the opportunity to comment on their plans and make meaningful choices on the service levels they want HD to deliver.

This culminated in an overall plan, with a bill impact and service improvements. This plan was tested with customers to gauge their acceptability.

HD had two overarching business objectives that it was looking to tackle through this piece of research:

Research Objectives

1

To determine the overall acceptability of the PR19 business plan in terms of bill impact, bill profile (2020-2025) and service improvements across different customer groups (general HH and NHH customers, younger bill payers, those in financially vulnerable circumstances and hard to reach customers).

2

To understand why the business plan is acceptable or not and the implications for affordability.

2. Methodology



Methodology

We adopted a face-to-face CAPI methodology for this piece of customer engagement in order to enable us to gain the greatest level of coverage across Wrexham.

CAPI

The face-to-face interviews were carried out by our Welsh field-force of experienced, quality assured interviewers. Interviews were carried out in accordance with industry (IQCS/MRS) standards and quality procedures.

Not only did this methodology allow us to cover the core HD customer base, it also enabled us to ensure that we covered a range of vulnerable and harder to reach groups within the research (detailed later in the document).

We also offered respondents the chance to complete the survey in Welsh if they wanted to.



Sample: who we spoke to

We spoke to a representative sample of Wrexham's HH customer base (see overleaf).

In surveys such as this, the results are subject to certain confidence intervals.

The confidence interval (or margin of error) is a plus-or-minus figure that allows you to say that you are 95% confident that, had the entire population from which the sample had been drawn from been surveyed, the figure you have ended up with would have fallen somewhere in between this interval.

The below table details confidence intervals for a range of sample sizes.

Sample size	Confidence intervals
200	+/-6.9%
100	+/-9.8%
50	+/-13.8%



Quotas & weighting

A final sample of HH customers is shown here.



Fieldwork between 17th
January & 27th January 2019

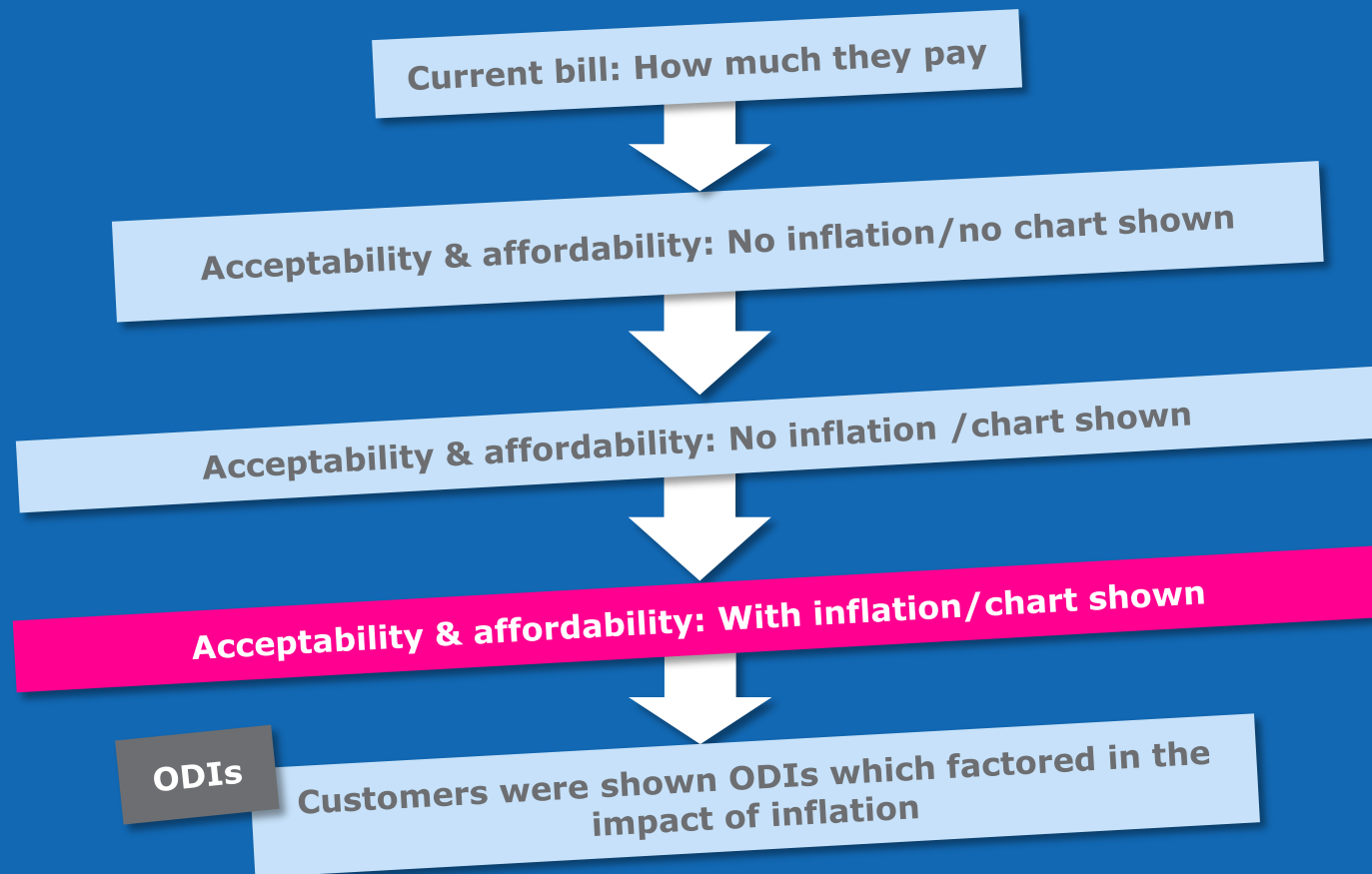


Wrexham

		(CAPI)	
		Completes (weighted)	% (weighted)
Gender	Male	114 (104)	48%
	Female	102 (112)	52%
Age	18-24	9 (13)	6%
	25-34	53 (28)	13%
	35-49	41 (52)	24%
	50-64	46 (63)	29%
	65-74	49 (37)	17%
	75+	18 (24)	11%
SEG	AB	46 (62)	29%
	C1C2	119 (93)	44%
	DE	48 (58)	27%
Income	£19,999 or less	28 (27)	13%
	£20,000 or more	61 (61)	28%
Meter	Metered	106 (93)	44%
	Unmetered	94 (118)	56%
TOTAL		216 (216)	

Questionnaire

We structured the questionnaire in a way that began by asking customers how much their current bill is before providing them with a view of the plan. A more informed view showing charts was then gained before customers were asked for their views towards the ODIs:



3. Executive Summary





Executive Summary (1)

Agreement with the proposed plan of improvements

Customers were first shown a number of performance commitments and asked the extent to which HD should aim to improve their performance in these areas.

There was a consensus across cohort group that the performance commitments should be improved.



% agreeing with each area

Water supply improvement –
improving the reliability
& quality of tap water

Water supply improvements –
ensuring all customers can
access and afford water

Wrexham HH

89%

95%

Executive Summary (2)

Acceptability: without inflation, no chart

Customers had some initial information read out to them concerning how Hafren Dyfrdwy is required by the water industry regulator, Ofwat, to produce a plan explaining how they will provide water and sewerage services, and the investments they will make, for the 5-year period 2020 to 2025.

Following this, they were told that over the five year period customer water and wastewater bills will change and were then given a percentage by which their bill will be changing, before the effect of inflation is added in. Acceptability was then asked on this basis.

From this position, over two thirds of customers in Wrexham found the plan to be acceptable.

NET Total Acceptability: (n = 216)	NET Acceptability: JAM (n =59)	NET Acceptability: Low income (n = 27)	NET Acceptability: Health & wellbeing (n= 48)	NET Acceptability: Service experience (n= 82)
68%	41%	64%	59%	56%



Significantly different than the Wrexham total



Executive Summary (3)

Acceptability: without inflation, with chart

Customers were next shown a chart in order to gain a further view of acceptability towards the plan, without the impact of inflation being taken into account.

When shown the plan without inflation and with a chart, acceptance was measured at 70% in Wrexham with JAMs customers significantly less accepting of the plan.



NET Total Acceptability: (n = 216)	NET Acceptability: JAM (n =44)	NET Acceptability: Low income (n = 27)	NET Acceptability: Health & wellbeing (n= 48)	NET Acceptability: Service experience (n= 82)
70%	47%	64%	59%	62%



Significantly different than
the Wrexham total

Executive Summary (4)

Acceptability: with inflation, with chart

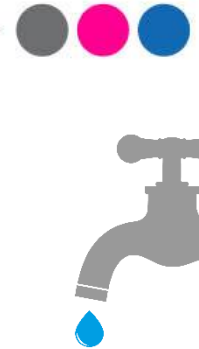
The next step in informing customers about the plan was to provide them with the associated bill impacts, but this time with figures that included the impact of inflation and a chart to show this.

Just over half (51%) of customers in Wrexham accepted the proposed bill, suggesting that presenting bill profiles with or without inflation and showing a chart does make a significant difference to net acceptability.

NET Total Acceptability: (n = 216)	NET Acceptability: JAM (n =44)	NET Acceptability: Low income (n = 27)	NET Acceptability: Health & wellbeing (n= 48)	NET Acceptability: Service experience (n= 82)
51%	24%	50%	39%	35%



Significantly different than
the Wrexham total





Executive Summary (5)

Affordability

Because customers were asked about future affordability at numerous points throughout the survey, we are able to look at the proportion of customers who find the bill affordable when inflation is not taken into account, as well as the proportion of customers who would find their future bill affordable when inflation is taken into account.

Perceived affordability rises once customers are shown a chart displaying figures without inflation, but then unsurprisingly lowers when prices were viewed including inflation.

Affordability (without inflation, no chart)	Affordability (without inflation, with chart)	Affordability (with inflation, with chart)
68%	70%	51%

**% agreeing that the prices mentioned
are/would be affordable**

Views towards the ODI mechanism

Firstly, when viewing the penalty mechanism, just over half of customers find the ODIs acceptable (51%), those who are just about managing to pay their bills were significantly less likely to find the bills acceptable.

When examining the reward mechanism, interestingly, support tended to remain the same around (50%).

3. Agreement with the proposed plan of improvements

In order to begin informing customers about the proposed plan they were shown a number of performance commitments and asked the extent to which HD should aim to improve their performance in these areas.

For the full description of the showcards please see Appendix (p52 + p63)





Agreement with the proposed plan: improving reliability and quality of tap water

There was a strong consensus amongst customers in Wrexham that HD should be committing to improve performance in the reliability and quality of tap water.



■ Don't know

■ Neither agree/nor disagree

■ I agree Hafren Dyfrdwy should aim to improve in these areas

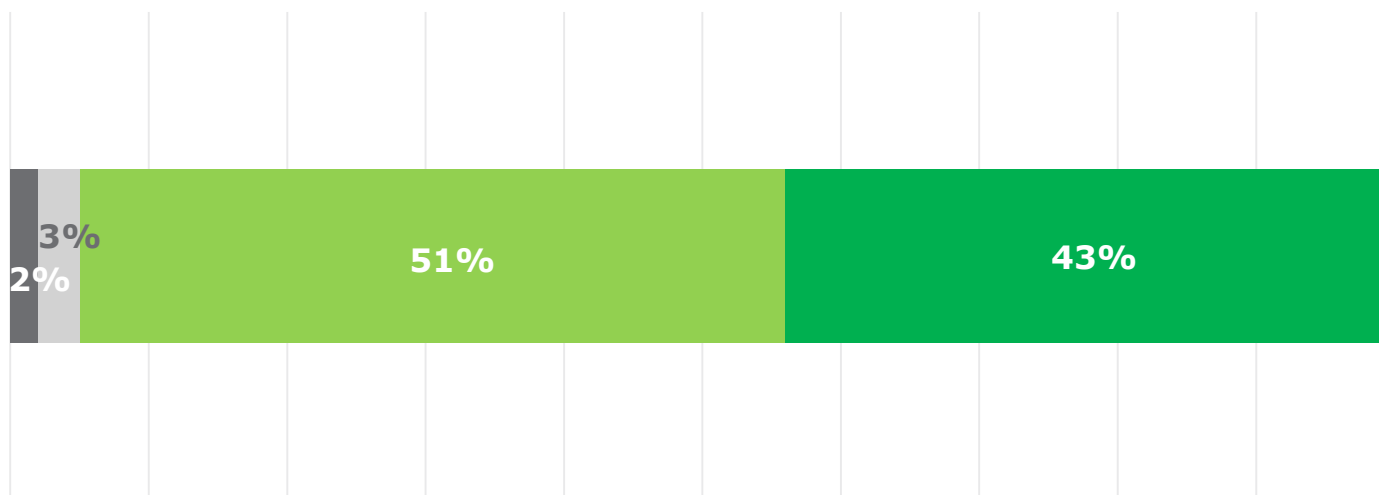
■ I disagree Hafren Dyfrdwy should aim to improve in these areas

■ I strongly agree Hafren Dyfrdwy should aim to improve in these areas



Agreement with the proposed plan: ensuring all customers can access & afford water

Almost all Wrexham customers feel that HD should be committing to improve performance in ensuring all customers can access and afford water.



■ Don't know

■ Neither agree/nor disagree

■ I agree Hafren Dyfrdwy should aim to improve in these areas

■ I strongly agree Hafren Dyfrdwy aim to improve in these areas



4. Acceptability (without inflation, without chart):

What respondents
were shown/told in order
to gain a view of the plan,
before inflation was added
in

(no inflation/no chart)

Wrexham customers were told that:

Over a 5 year period the average household bill for water services will increase, on average, by £6 before the effect of inflation is added in.

In percentage terms this means that the average water bill will increase by 3% over the 5 year period (before the effect of inflation is added in).

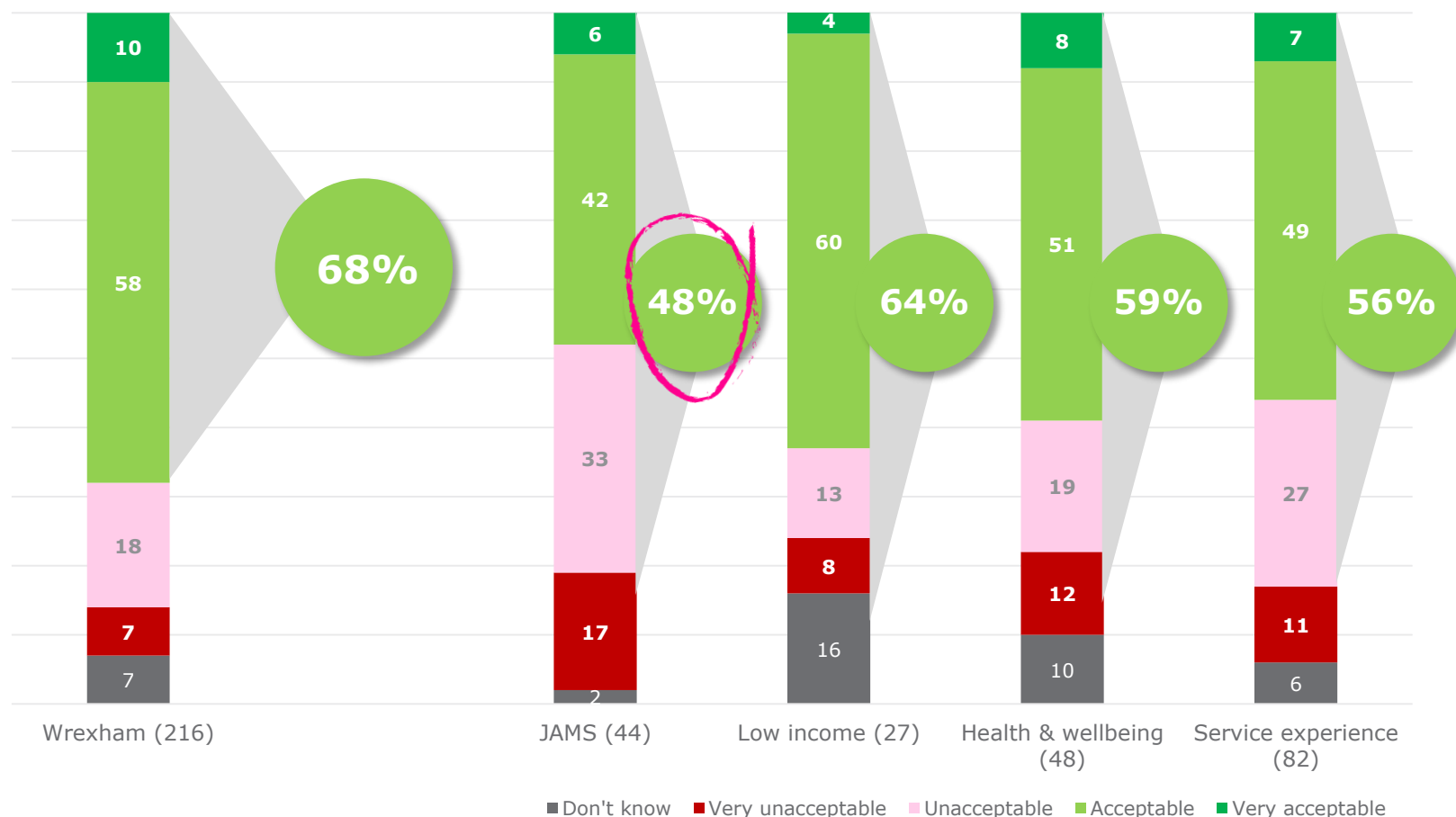
For the full description of the question/context please see Appendix (p48)



Acceptability: no inflation, no chart

When examining acceptance of the proposed plan compared to the overall customer base, JAMS customers are significantly less likely to be accepting of the proposed plan.

Key: XX% = NET acceptable and very acceptable.
Circled in pink if sig diff to the average



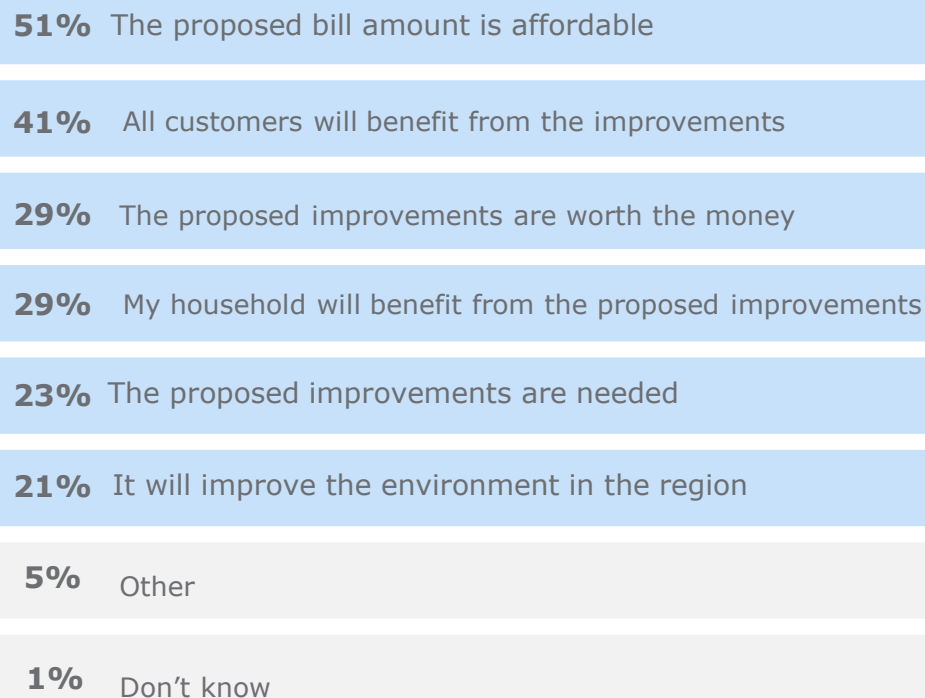


Reasons for acceptability

Just over half feel the proposed bill is affordable while over two fifths feel that all customers will benefit from the improvements.

Wrexham

n=
147



Reasons why the proposed plan (no inflation, no chart) is acceptable



Reasons for unacceptability

Whilst base sizes need to be considered, a feeling that the bill is already too expensive is prevalent.

Wrexham

n=
147



53%	Already too expensive
25%	I cannot afford an increase in my bill
23%	I feel company profits too high already
13%	The proposed service improvements are not enough
20%	Other
3%	Don't know

Reasons why the proposed plan (no inflation, no chart) is unacceptable

5. Acceptability (without inflation, with chart):

What respondents were shown/told in order to gain a view of the plan, before inflation was added in but this time, respondents were shown a chart illustrating the bill change from 2020-2025
(no inflation/with chart)

Wrexham customers were told that:

The profile of the bill over the 5 year period depends on when the investments your water company makes will take place. We will now show you the proposed profile over time.

NB. Customers were then shown a chart of the predicted increase from £253 in 2020 to £259 in 2025 before inflation.

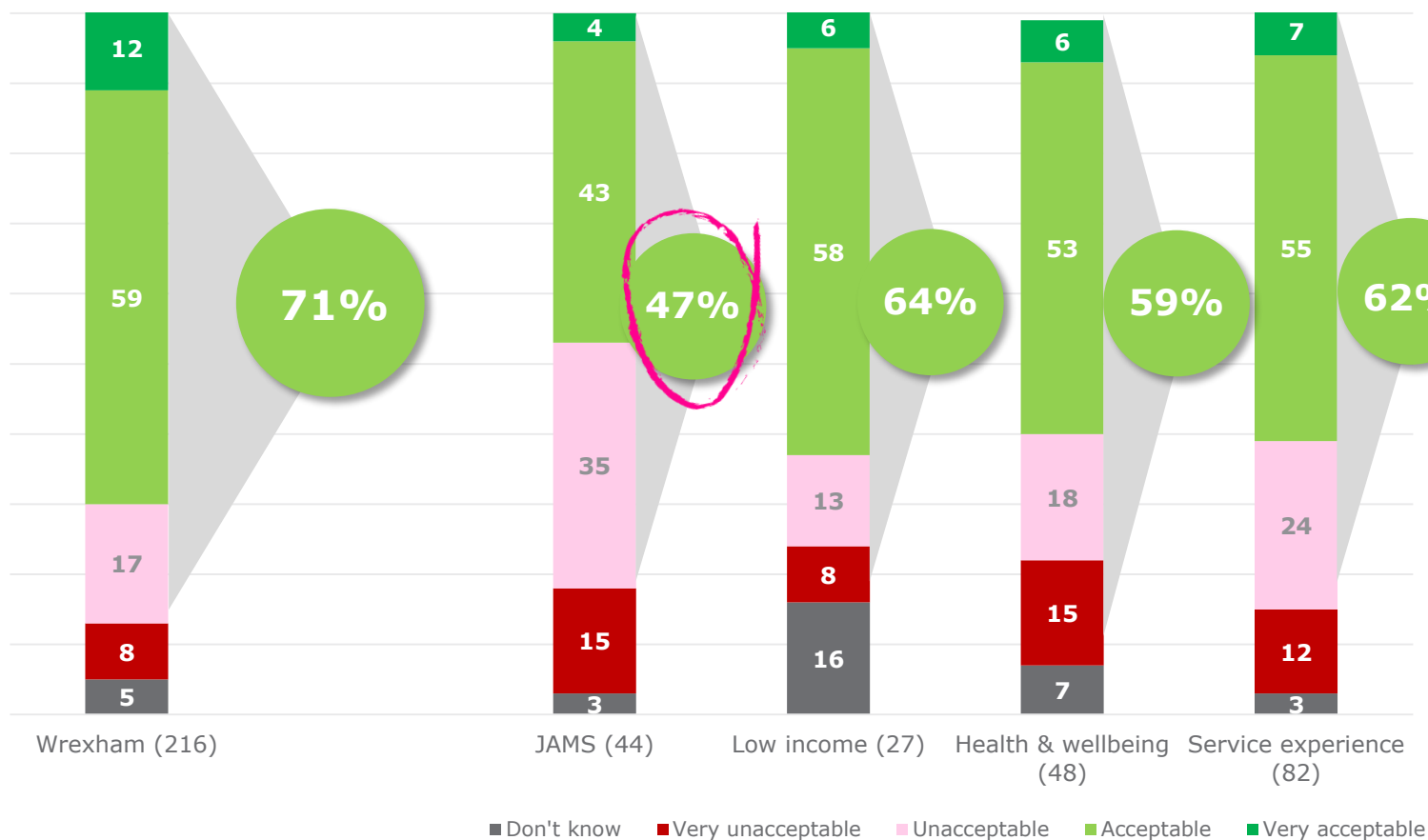
For the full description of the question/context please see Appendix (p49)



Acceptability: no inflation, with chart

When examining acceptance of the proposed plan compared to the overall customer base, JAM customers are significantly less likely to be accepting of the proposed plan.

Key: XX% = NET acceptable and very acceptable.
Circled in pink if sig diff to the average





Change of opinion in acceptability

Those that changed their opinion to finding the bill acceptable felt it was a reasonable, while those who thought it was unacceptable felt the bill was too much to pay.

Acceptable

Average bill is cheap

In graph terms it doesn't seem so bad and is more understandable than thinking of it in percentages

It's not a lot to pay for something we need

If you spread it out it's a small amount

Unacceptable

Can't afford it


Just going up

Too much

Understood more in graph format



10 customers moved to acceptable (either very acceptable or acceptable), 5 customers moved to unacceptable (either very unacceptable or unacceptable) and 2 customers moved to don't know: 2



6. Acceptability (with inflation, with chart):

Customers were next shown information in order to gain their view of the plan, but this time **with** the impact of inflation being taken into account

(with inflation, with chart)

Wrexham customers were told that:

The average household water bill by 2020 is predicted to be £159. Your bills are affected each year by inflation.

The average bill for water services, including a forecast of inflation, will increase from £159 in 2020, to £182 in 2025. This is an average increase of £5 per year, or £0.38 per month (which is 3% per year).

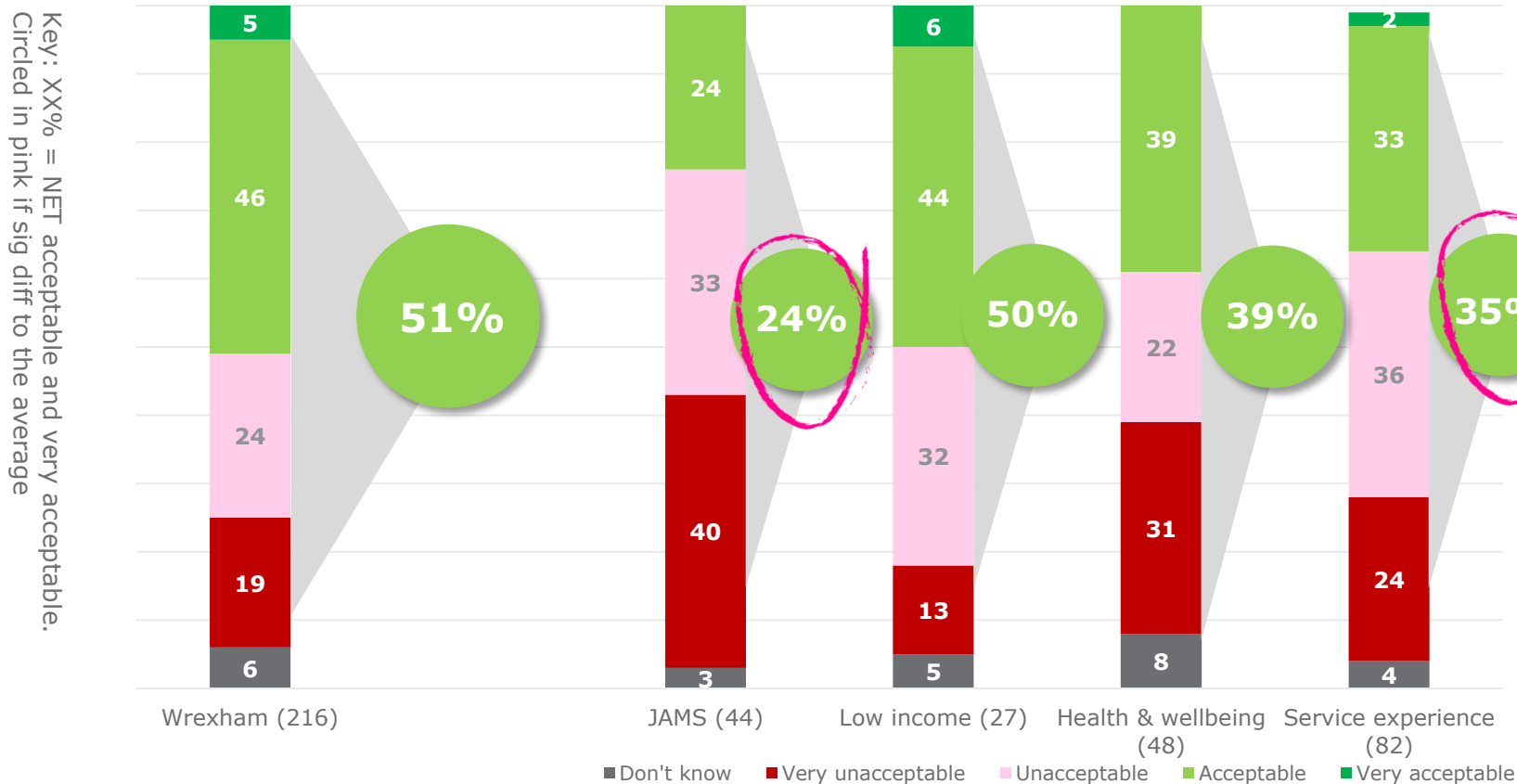
NB. Customers were then shown a chart of the predicted increase from £159 in 2020 to £182 in 2025 after inflation.

For the full description of the question/context please see Appendix (p50)



Acceptability: with inflation, with chart

When examining acceptance of the proposed plan compared to the overall customer base, JAM customers and those who have experienced a service issue are significantly less likely to be accepting of the proposed plan.





Change of opinion in acceptability

The majority of those that changed their opinion after seeing the proposed bill including inflation (and with a chart) did so due to now viewing the proposed bill as unaffordable.

Acceptable

We have got to pay it

I'd need to know where it was being spent

Thought it would be more

Can't help inflation

As long as it's reinvested

Unacceptable

Can't afford it

Since Hafren Dyfrdwy took over from Dee Valley there has been already been an increase in water billing so any further increase is not acceptable or affordable

With inflation the increase is too high

Not so affordable to when take inflation into consideration

Will wages go up by the same amount?



13 customers moved to acceptable (either very acceptable or acceptable), 49 customers moved to unacceptable (either very unacceptable or unacceptable) and 6 customers moved to don't know

Q20: Why have you changed your opinion on how acceptable the plan is from earlier? ? Base: All Respondents, Wrexham n=68

Summary of acceptability

Acceptability, when viewed without inflation, remains static even when shown the bill impact on a chart. However acceptability decreases once respondents see the proposed bill including inflation (displayed on a chart).



	NET Total Acceptability: (n = 216)	NET Acceptability: JAM (n =44)	NET Acceptability: Low income (n = 27)	NET Acceptability: Health & wellbeing (n= 48)	NET Acceptability: Service experience (n= 82)
Acceptability (no inflation, no chart)	68%	48%	64%	59%	56%
Acceptability (no inflation, with chart)	70%	47%	64%	59%	62%
Acceptability (with inflation, with chart)	51%	24%	50%	39%	35%



Significantly different than
the Wrexham total

7. Affordability

A look at the proportion of customers who find their current bill affordable as well as the proportion of customers who *would* find their future bill affordable, both with and without inflation being taken into account

Customers were asked about how affordable they felt the proposed bill *would be* both with and without inflation:

- They were asked about the affordability of the proposed bill without inflation, both with and without a chart shown
- They were also asked about the affordability of the proposed bill with inflation and displayed on a chart



Perceptions of affordability

Customers were significantly less likely to find the proposed plan affordable once they had seen the figures including inflation.

	NET Total affordability: (W n = 216)	NET affordability: JAM (W n =44)	NET affordability: Low income (W n = 27)	NET affordability: Health & wellbeing (W n= 48)	NET affordability: Service experience (W n= 82)
Affordability (no inflation, no chart)	70%	40%	63%	53%	62%
Affordability (no inflation, with chart)	73%	40%	59%	57%	64%
Affordability (with inflation with chart)	54%	22%	50%	41%	43%



Significantly different than
the Wrexham total



Reasons for the proposed bill being seen to be unaffordable

A number of reasons were given for why the bills were perceived to be unaffordable

Wrexham

n=
33



39% Both the current and future bill are unaffordable for me

31% My current bill is affordable but I am worried about the combined impact of £6 plus inflation

26% My current bill is affordable but the increase of £6 over 5 years will make it unaffordable

4% Other

Reasons why the proposed plan (no inflation, no chart) is unaffordable

8. Views towards ODI penalty mechanism



Customers in Wrexham were given the following information:

If Hafren Dyfrdwy does not meet all of its targets, the average 2025 water bill, including inflation, could go to £2 lower than the original proposal (£180 instead of £182).

However, this would mean the service you receive is not as good as the plan you saw earlier. For example there would be more water quality complaints, supply interruptions, leakage, properties suffering from low pressure, and flooding incidents.

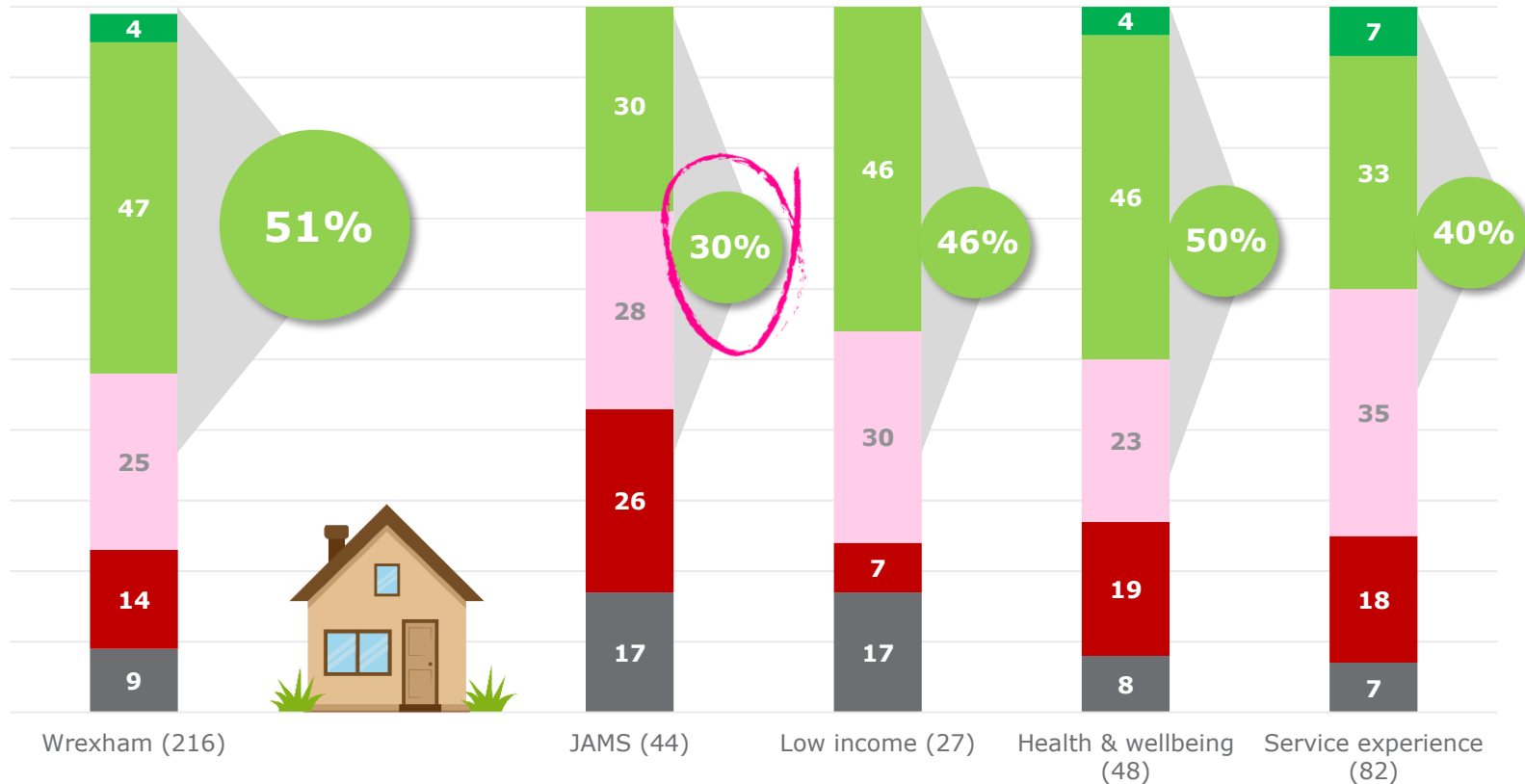




Acceptability of ODIs

Over half of customers in Wrexham find the ODI penalty mechanism acceptable, whilst just under a third of JAMS customers find the ODI penalty mechanism acceptable.

Key: XX% = NET acceptable and very acceptable.
Circled in pink if sig diff to the average.



NB. Customers were told that the average 2025 bill could come down by £2

Q23: After reading what you have just read, could you please state whether you think this is acceptable to you as a customer? Base: All Respondents Wrexham (weighted data) n=216.

9. Views towards ODI incentive mechanism



Customers in Wrexham were given the following information:

On the other hand, if Hafren Dyfrdwy exceeds all of its targets and delivers significant additional improvements, the average 2025 bill, including inflation, could be £1 higher than the proposal you saw earlier (£183 instead of £182).

This would mean the service you receive would be better than the plan we showed you earlier.

For example, there would be fewer water quality complaints, fewer supply interruptions, less leakage and fewer properties suffering from low pressure.

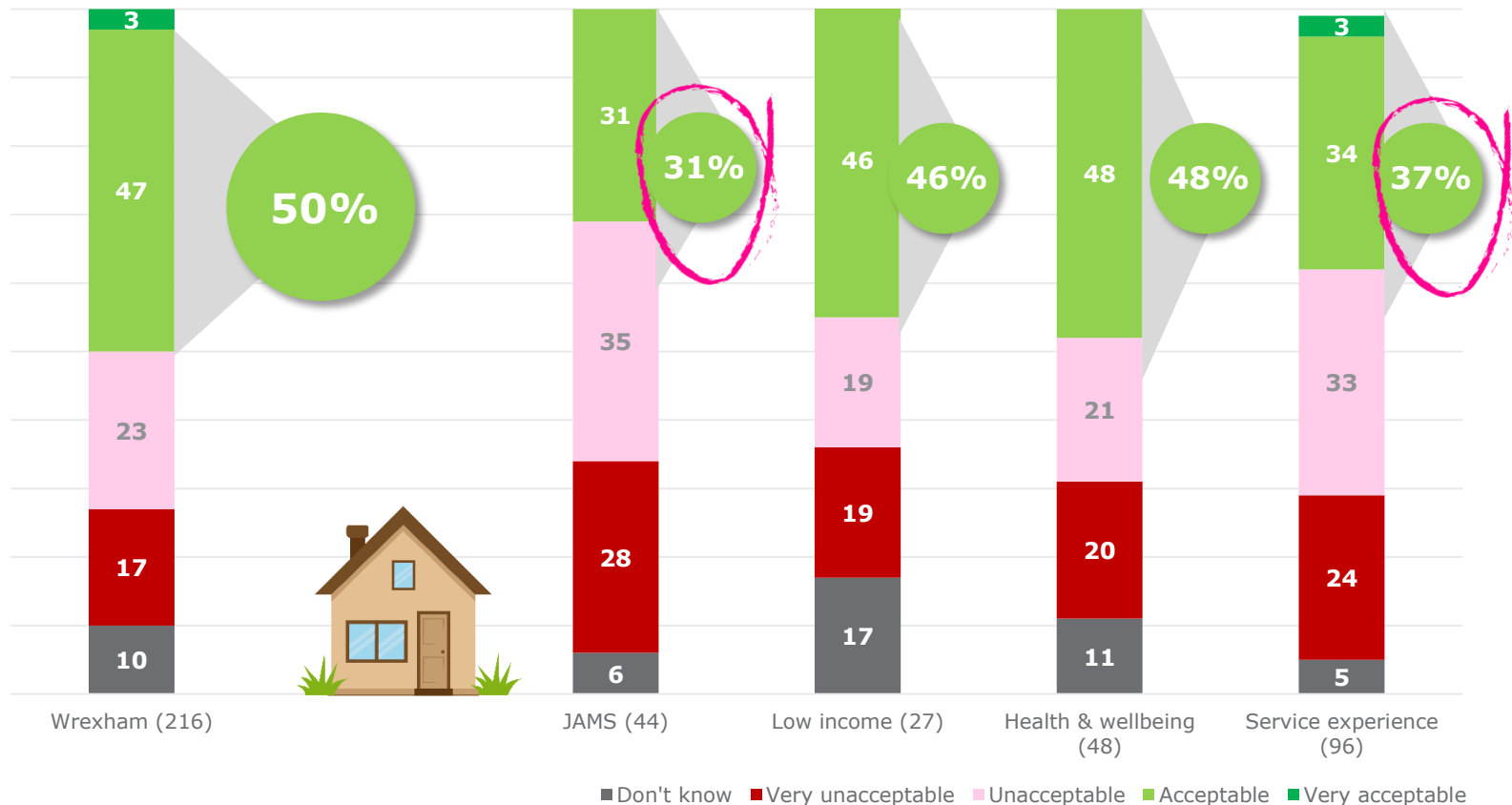




Acceptability of ODIs

Aside from JAMS customers and those who experienced a service issue, acceptance of the reward mechanism was around 50% for various customer groups.

Key: XX% = NET acceptable and very acceptable.
Circled in pink if sig diff to the average.



NB. The changes to bills that the average 2025 customer would increase by £1

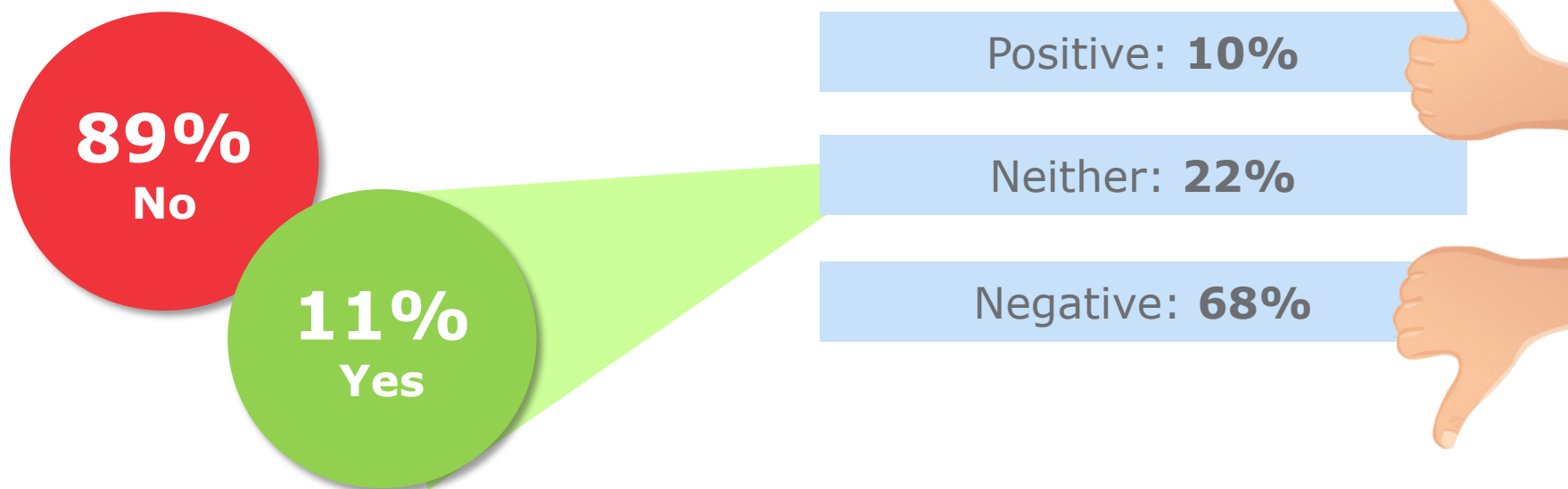
9. Water companies in the media





Seen any stories in the media concerning water companies

The majority of customers have not seen any stories in the past few months concerning water companies. Over two thirds who had seen stories believe they were negative.



Q25: Have you seen any stories in the news over the past few months concerning water companies? N=216

39 Q26: And did you consider these stories to be mainly positive or negative? (All those who had seen stories in the media n=23)

10. Appendix



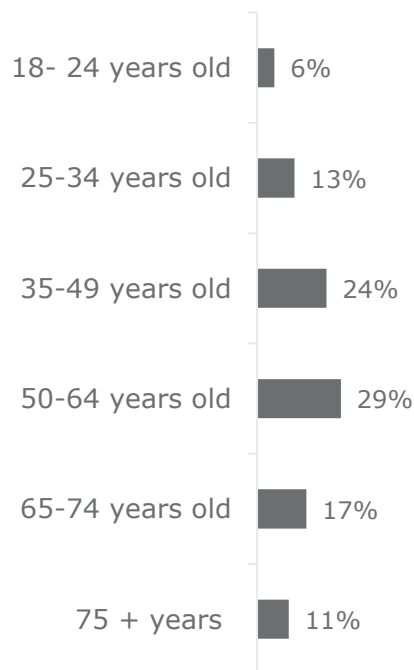
10a. Other demographics & attitudes



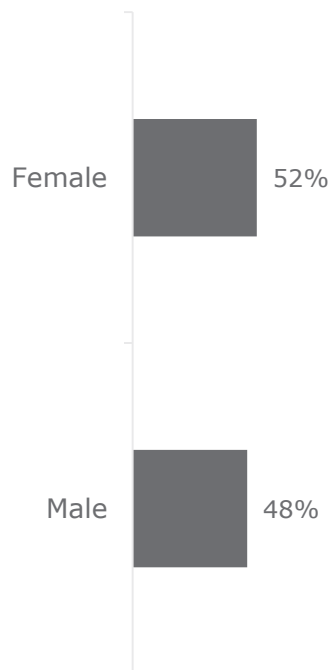


Demographics

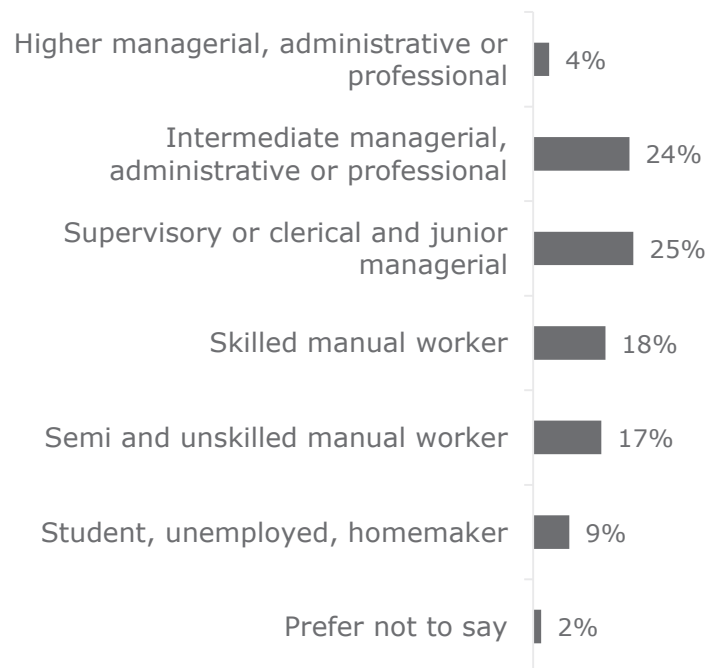
Age



Gender



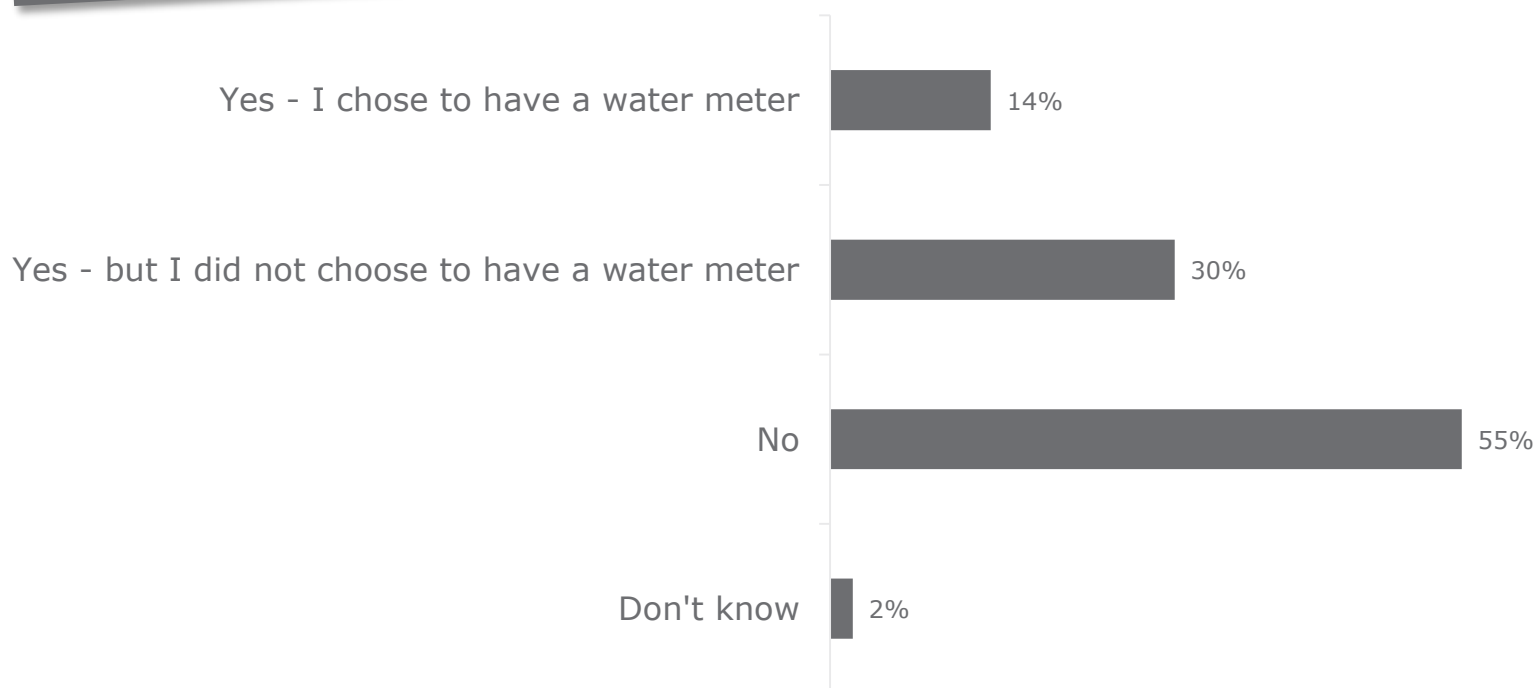
SEC





Breakdown: metered/ unmetered customers

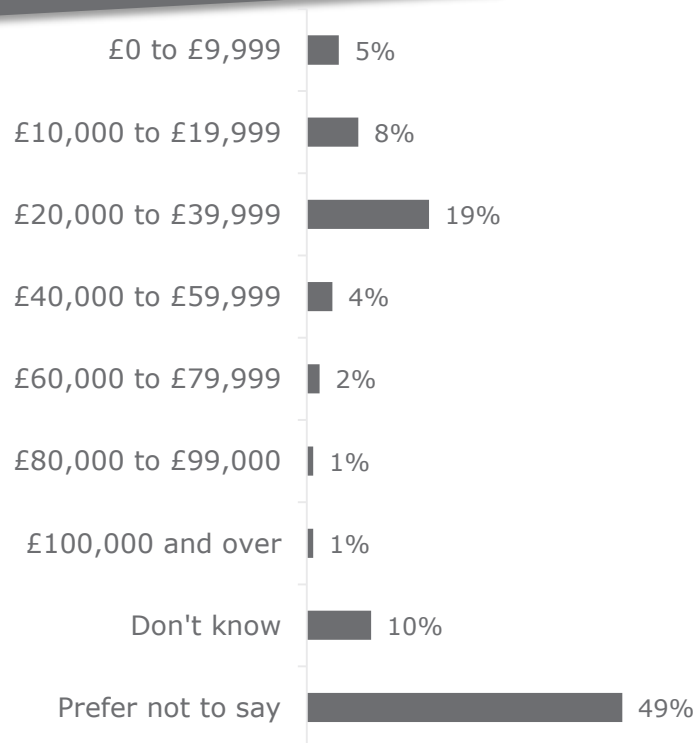
Metered/unmetered



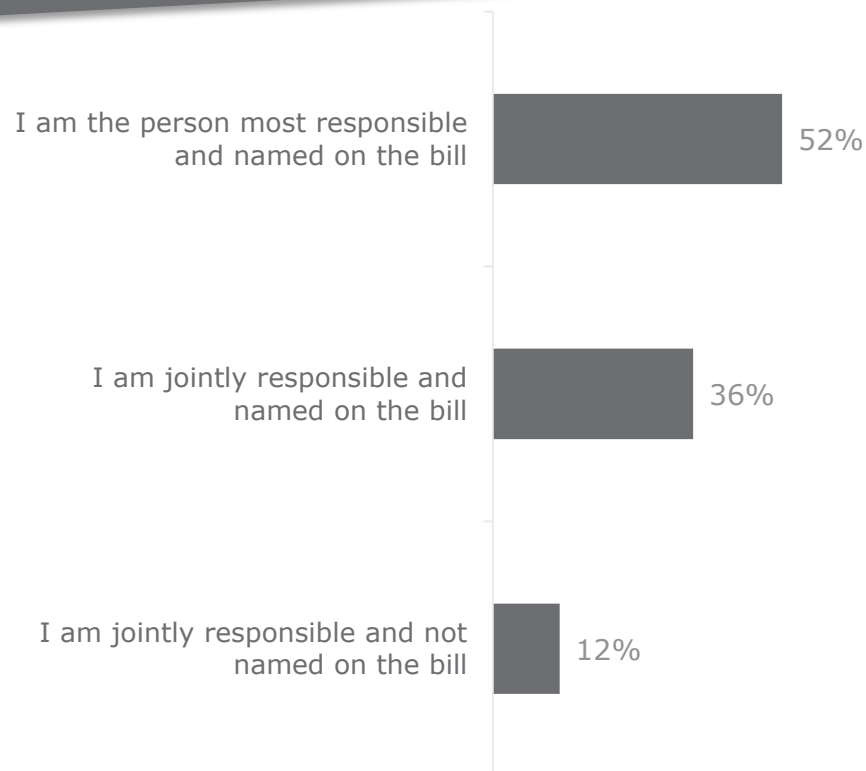
Breakdown: income and responsibility



Household Income



Responsibility for paying the bill



Q28. Which of the following income bands does your total household income fall into? (Wrexham:216)

S06: Which of the following best describes how responsible you are for paying the water bill in your household? (Wrexham:216)

●●●

10b. Showcards





Acceptability: no inflation, no chart

Customers were shown:

The plans that your water company is proposing, including the improvements to service you have just seen and investment required to meet new legal requirements, will mean that over the 5 year period the average household bill for water services will increase, on average, by £6 before the effect of inflation is added in.

In percentage terms this means that the average water bill will increase by 3% over the 5 year period (before the effect of inflation is added in).

Not shown to those with a septic tank:

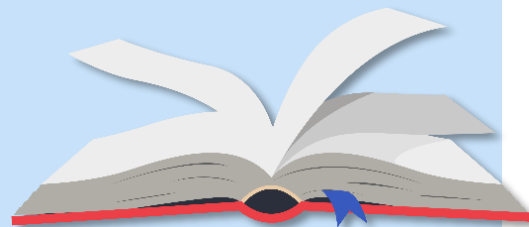
Please remember that Welsh Water supplies your wastewater services and this part of the bill is predicted to increase by 2.4% over the 5 year period before inflation which equates to £6.

If respondent asked:

Inflation is the rate of increase in prices for goods and services. So, if inflation is 3% higher than 12 months earlier, 4 pints of milk which was £1 twelve months ago will now cost £1.03.

Incomes and pensions can also rise in line with inflation which can offset the increase in cost of goods and

Given the information you have been provided, overall how acceptable do you consider the proposed plan to be?





Acceptability: no inflation, with chart

Customers were shown:

The profile of the bill over the 5 year period depends on when the investments your water company makes will take place. We will now show you the proposed profile over time.

Not shown to those with a septic tank:

To remind you, your wastewater bill, provided by Welsh Water, will increase from a predicted £253 in 2020 to £259 in 2025 before inflation.

Having seen this graph, overall how acceptable do you now consider the proposed plan to be for your water services?





Acceptability: with inflation, with chart

Customers were shown:

We would now like to discuss your future water bill, including a forecast for inflation. Inflation is the rate of increase in prices for goods and services. So, if inflation is 3% higher than 12 months earlier, 4 pints of milk which was £1 twelve months ago will now cost £1.03. When you look at the bill please remember that incomes and pensions can also rise in line with inflation which can offset the increase in cost of goods and services.

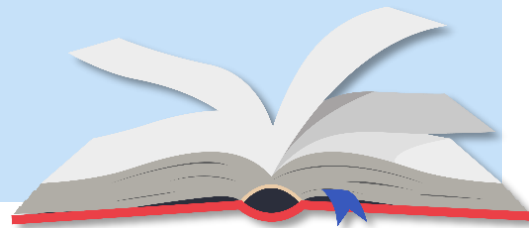
The average household water bill by 2020 is predicted to be £159. Your bills are affected each year by inflation. The average bill for water services, including a forecast of inflation, will increase from £159 in 2020, to £182

in 2025. This is an average increase of £5 per year, or £0.38 per month (which is 3% per year).

Not shown to those with a septic tank:

Please remember, Welsh Water provides your waste water bill which (the average bill) is forecast to increase from £266 in 2020 prices to £300 in 2025. This is an average increase of £7 per year or £0.58 per month (which is 3% per year).

Given the information you have been provided, overall how acceptable do you consider the proposed plan for water services to be?



Hafren Dyfrdwy serves ~ 120,000 properties in mid & North Wales



Eight pledges to put our customers first



Having the lowest possible bills

Providing water which is good to drink

Ensuring water is always there when you need it


Ensuring the environment is protected and thrives

Providing outstanding customer experience

Ensuring everyone can access and afford water

Making a positive difference

Being a company you can trust



These are the **core service areas**, and where the vast majority of the money from customer bills is spent.



Improving the reliability & quality of tap water



Providing water which is good to drink



Maintain high standards of safe drinking water



A 35% reduction in the number of complaints about the taste, smell & appearance of tap water



A programme of lead pipe replacement in schools & nurseries and target replacement in hotspot areas

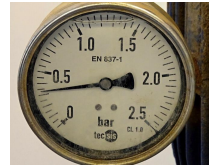


Investment in treated water reservoirs and in the safety of our dams

Ensuring water is always there when you need it



Reducing leakage by at least 15%



A 25% reduction in the number of properties suffering from low pressure



A 27% reduction in the average amount of time customers are without water, due to pipe bursts or maintenance



Maintaining and replacing pipes to reduce mains bursts by 11%



Inspiring children and adults to use water wisely and promoting the health benefits of tap water



Ensuring all customers can access and afford water



Having the lowest possible bills



The lowest bills in the UK for years to come



An efficient company that reinvests for the long term to safeguard resilience services for customers

Ensuring everyone can access and afford water



A 200% increase in the number of customers who are struggling to pay their bills that we offer financial support to



A care and assistance team trained to respond to customers' individual needs



Support for all customers in vulnerable circumstances during water supply incidents

Taste, smell & appearance

Complaints from customers about their tap water



You may occasionally become aware of a different taste or smell of your drinking water. This could be due to the use of chlorine to maintain good hygiene in the pipe network, a change in where your water comes from, or your plumbing.

Your water should be clear, but very occasionally for a short time it may appear different in colour. This can be caused by a burst main or leak, or air making the water appear white.

Your water will still be safe to drink.

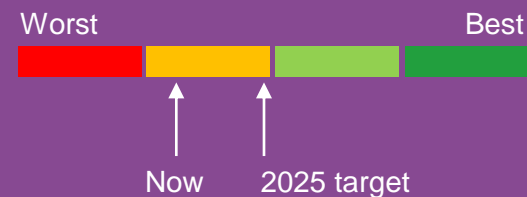
Where we will be in 2020:

Around 490 complaints per year about the taste, smell and appearance of drinking water.

What Hafren Dyfrdwy proposes for 2025:

Reduce complaints to no more than 320 per year about the taste, smell and appearance of drinking water. This represents a 35% improvement.

How Hafren Dyfrdwy compares to other companies:



Water supply interruptions

Losing the water supply to your home for hours at a time



From time to time, water pipes burst and Hafren Dyfrdwy is unable to keep the water supply flowing to your home.

Your water supply at your home or business would be interrupted. You may or may not be warned about this in advance and it could last a few hours, or a day or more.

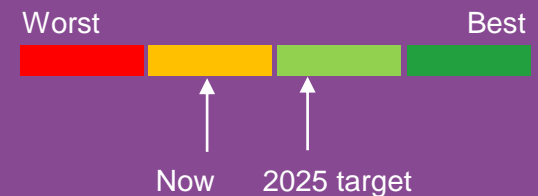
Where we will be in 2020:

Every year some customers in the region experience an interruption to supply. Hafren Dyfrdwy reports on the average length of interruption across all customers. In 2020 this will be around 11 minutes.

What Hafren Dyfrdwy proposes for 2025:

To reduce the average length of interruptions across all customers to 8 minutes. This represents an 27% improvement.

How Hafren Dyfrdwy compares to other companies:



Leakage

Water leaking from pipes



Underground pipes supply the tap water to your property. Sometimes pipes can leak and water is lost between the treatment works and your property.

You might see water running down the street or experience traffic disruption while a leak is being repaired. You might have a leak on your supply pipe which you own and which is your responsibility to repair.

Where we are now:

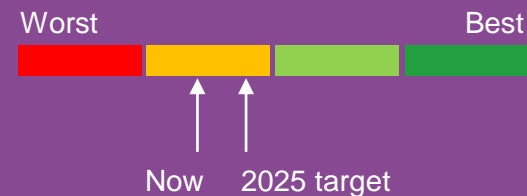
Around 6 mega litres per day of leakage.

A standard **Olympic-size swimming pool** contains 2.5 mega litres of water.

What Hafren Dyfrdwy proposes for 2025:

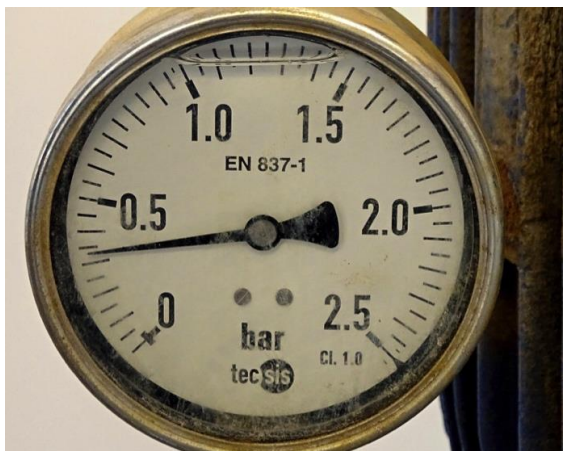
To reduce leakage by at least 15%.

How Hafren Dyfrdwy compares to other companies:



Low pressure

Water trickling from your tap, which can affect showers and boilers



You should expect the water to arrive at your home/ business under a certain pressure so that it flows well from the tap. Low pressure can reduce water flow to a dribble and some modern boilers and showers will not work below certain pressure levels.

There is a minimum standard on pressure that water companies have to reach. Very occasionally Hafren Dyfrdwy doesn't meet this standard.

Where we will be in 2020:

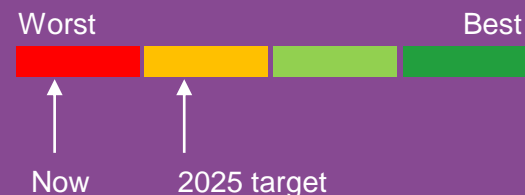
The number of properties in the region are affected by persistent low pressure is 56.

What Hafren Dyfrdwy proposes for 2025:

To reduce the number of properties to 42.

This represents a 25% improvement.

How Hafren Dyfrdwy compares to other companies:



Lead pipes

Protecting properties, schools and nurseries from lead in drinking water



Water leaving the treatment works is virtually free of lead, but small traces can sometimes be picked up as the water passes through old lead pipes.

Whilst water pipes in the road are owned by Hafren Dyfrdwy, customers own the part of the supply pipe that lies within their property boundary.

There are strict regulations concerning the amount of lead allowed in drinking water. Public health officials are currently considering reducing the current standard and this is likely to come into force in 2030.

How this affects you...

Lead can cause health problems – particularly among young children. Lead can build up in your body over a period of time, so long term exposure to even small amounts of lead can be harmful.

What Hafren Dyfrdwy proposes by 2025:

Offer all schools & nurseries in the region the opportunity to be tested against the tighter lead standards and offer replacement if lead pipes are found.

Plus there will be proactive targeted replacement in a few hotspot areas where samples are only just complying with the current standard, and improved awareness and education about lead in water for all.

Education

Inspiring customers to use water wisely



severn dee



Hafren Dyfrdwy works with school children to teach them about using water responsibly and what not to flush down the toilet.

The company also provides free in-home water efficiency checks to help customers save water and work with restaurants to prevent fats and oils being put down drains.

Small changes to your water usage can help ensure there will be enough water for future generations.

Disposing of items like fats and wipes correctly prevents sewer flooding.

Where we are now:

Hafren Dyfrdwy currently runs assemblies in schools and helps customers use less water (for example by installing water saving devices).

What Hafren Dyfrdwy proposes by 2025:

Hafren Dyfrdwy is proposing to increase their education activities with school children, including more fun learning using virtual reality games.

Education

Inspiring customers to use water wisely



severn dee



Hafren Dyfrdwy works with school children to teach them about using water responsibly.

The company also provides free in-home water efficiency checks to help customers save water.

Small changes to your water usage can help ensure there will be enough water for future generations.

Where we are now:

Hafren Dyfrdwy currently runs assemblies in schools and helps customers use less water (for example by installing water saving devices).

What Hafren Dyfrdwy proposes by 2025:

Hafren Dyfrdwy is proposing to increase their education activities with school children, including more fun learning using virtual reality games.

Helping customers who struggle

Supporting customers who struggle to pay their water bill



severn dee



Hafren Dyfrdwy provides a range of support options to customers who are struggling to pay their water bill.

How this affects you...

You might qualify for support if you are struggling to pay your bill. This could range from a discount on your bill to flexible payment plans.

Where we will be in 2020:

Hafren Dyfrdwy will be supporting 54% of customers who are struggling to pay their water bill through bill discounts and other options.

What Hafren Dyfrdwy proposes by 2025:

A new range of support options which will support 73% of customers who are struggling to pay their water bill.

Support for all customers in vulnerable circumstances during water supply incidents



Hafren Dyfrdwy has a *priority services register* which lists those customers in vulnerable circumstances who might need tailored support such as delivery of bottled water in an incident.

How this affects you...

Some people have medical conditions or other circumstances, which means a disruption to their water supply can cause huge problems for them. The priority services register helps us to help these customers when they need it most.

Where we are now:

Hafren Dyfrdwy currently offers bottled water to vulnerable customers in an incident.

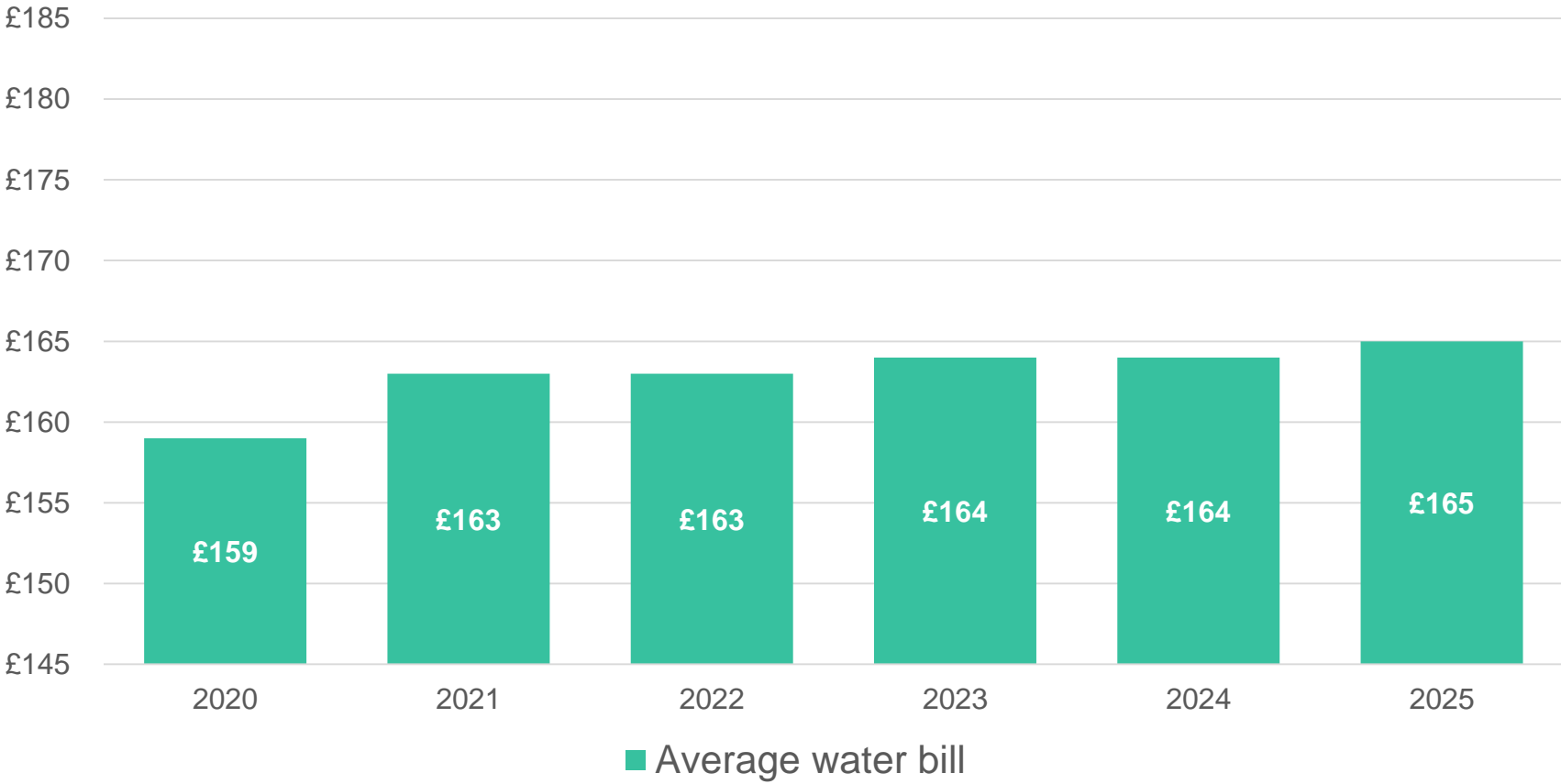
What Hafren Dyfrdwy proposes

Hafren Dyfrdwy has set up a new priority services register and is proposing to offer tailored services to 100% of customers on the register during an incident.

Average household water bill *excluding inflation*



severn dee



Average household water bill *including inflation*



severn dee

