C1

Engagement, Communication and Research

Appendix

BRISTOL WATER

Contents

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About this document

During the process of developing our business plan we have collected a wide range of evidence about how our customers value our service, their preferences and priorities, and their feedback on our proposals. This document presents a summary of that evidence organised by activity – it provides an index to all other documents which rely on customer evidence.

Ongoing and Regular engagement

There are a number of engagement activities that we undertake on a regular basis – once a quarter or once a year. As we undertake these regularly, they help us identify trends in customer views, and also see how changes and improvements we make impact on our customers.

We also engage with our customers every day. Over the last few years we have transformed the way we use this data to ensure we are capturing our customers' views, and learning from their feedback on an ongoing basis.

A1. Customer dashboard

Objectives	**To develop a simple reporting tool for customer engagement data that makes it easy for the business to take into account the customer voice in everyday decision making**
Drivers	Regulatory: ensuring that day-to-day customer contact is used to inform research priorities, and engagement is considered as an on-going process, integrated throughout business activities. Dashboard can also pull out data on particular customer segments e.g. vulnerable customers Business case: making the business more responsive to customer needs and priorities
Service attributes	N/A although dashboard is used to pull out data for customer responses to particular attributes.
# Customers	All
Methodology	We agreed on key data areas to track based on existing and planned research and designed a searchable tool for internal use.
Outputs	The dashboard is a live tool, and is referred to by our customer team regularly, and updated once a quarter. Once a year, we pull out an overview of our customer feedback across a range of service attributes to review what customers are saying to us.
Report	**No report**

Service Attribute	Priority		Customer perception of performance (annual survey) average: 87%	Average satisfaction score from replica survey average: 84.8	SIM dissatisfied (% in 2016/17) n/a	Complaints (% in 2016/17) average: 6%	Inbound calls (% in 2016/17) average: 7%	Overall RAG
Quality	*Provides water that tastes good and has no smell/provide water that looks good*	99%	94.3%	85.1%	3%	9.0%	7.8%	
Pressure	*Avoids low water pressure*	98.5%	92.5%	80.0%	6%	10.4%	6.8%	
Reliability	*Provides a regular water supply*	99.3%	96%	90.9%	9%	2.7%	13.1%	
Leakage	*Repairs leaks as quickly as possible*	98.3%	72.8%	82.9%	38%	9.5%	21.3%	
Metering	n/a			87.5%	6%	4.7%	1.7%	
Affordability	*Affordable bills*	98.3%	61.7%					
Road disruption	n/a					3.5%	0.60%	
Environment	*Helps protect the environment*	93%	59.7%					
Lead	n/a			95.8%	3%	0.5%	0.20%	
Service	*Resolves enquiries promptly*	98.50%	65.70%	n/a		24%*	3.4%**	

Figure 2 - Overview of performance against service attributes from Customer Dashboard 2016/17

Service Attribute	Priority (%age of customers rating it very important or quite important)		Customer perception of performance (annual survey) average: 86%	Average satisfaction score from replica survey average: 84.6	SIM dissatisfied (% in 2017/18) n/a	Complaints (% in 2017/18) average: 7%	Inbound calls (% in 2017/18) average: 7%	Overall RAG
Quality	*Provides water that tastes good and has no smell/provide water that looks good*	99.0%	95.0%	88.6%	2.0%	8.0%	9.4%	
Pressure	*Ensured adequate water pressure*	99.0%	94.0%	69.3%	17.0%	5.8%	6.8%	
Reliability	*Provides a regular water supply*	100.0%	99.0%	84.9%	15.0%	2.7%	12.9%	
Leakage	*Repairs leaks as quickly as possible*	100.0%	73.0%	83.7%	19.00%	8.4%	21.1%	
Metering	*Increases number of customers on meters*	76.0%	64.0%	86.6%	2.0%	8.4%	3.3%	
Affordability	*Affordable bills*	99.0%	83.0%					
Road disruption	*Reduces traffic distruption*	99.0%	65.0%			3.2%	0.01%	
Environment	*Helps protect the environment*	98.0%	73.0%					
Lead	n/a			91.9%		0.4%	0.03%	
Service	*Resolves enquires promptly*	99.0%	70.0%	82.80%	13.00%	17.40%	4.40%	

Figure 1 - Overview of performance against service attributes from Customer Dashboard 2017/18

A1 Customer Dashboard		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers – affordable for all	Affordability is a high priority for customers. Customer perception of performance on this issue is below average.
You get the best possible experience every time you need us	Achieving customer excellence	Customer service is a high priority for customers. Customer perception of performance on this issue is slightly below average. 3.4% of inbound calls to Bristol Water relate to customer service, but 24% of complaints. 0.6% of inbound calls and 3.5% of complaints relate to road disruption.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Leakage is a high priority for customers. It is the most commonly raised topic in inbound calls, with 21.3% of call relating to leakage. It is also the highest cause of customer dissatisfaction.
	Metering and water efficiency promotion and support	1.7% of inbound calls relate to metering and 4.7% of complaints. Customer satisfaction with this issue is above average.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	0.6% of inbound calls and 3.5% of complaints relate to road disruption.
	Building biodiversity and protecting our environment	Environment is one of customers' lowest priorities. Customer perception of performance on this issue is poor.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Water which tastes good, has no smell and looks good is a top priority for customers. Bristol Water is perceived to be performing well in this regard. Inbound calls on this issue amounted to 7.8% of those received and complaints were 9.0% of the total, the third highest amount.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Reliability of supply is a high priority for customers. Bristol Water is perceived to be performing well in this regard. 13.1% of inbound calls relate to reliability, but only 2.7% of complaints received. Water pressure is also seen as a high priority for customers. Bristol Water is perceived to be performing well in this regard. 6.8% of inbound calls and 10.4% of complaints relate to water pressure.
	Resilience – boosting protection for population centres of more than 10,000	N/A

High contribution
Medium contribution
Low contribution

A2. Customer engagement online home

Objectives	**To develop a part of the Bristol Water website to collect updates and information about how we engage with our customers.**
Drivers	Business case: communicating clearly to our customers the opportunities there are to be involved
Service attributes	N/A.
# Customers	All
Methodology	Web page which provides information to customers on: The Bristol Water Challenge Panel Online panel – how to sign up and also recent results Our Customer Forum & our Youth Board Information on any current engagement taking place ‘build your future bill’ innovative slider game
Outputs	https://www.bristolwater.co.uk/about-us/challenge-panel/
Report	**No report**

A3. Customer Forum

Objectives	**To adapt the existing Bristol Water online customer panel to provide more robust findings**
Drivers	Regulatory: represents innovation and embedded customer engagement
Service attributes	N/A
Timescale	Customers are invited to attend approximately 3 evening sessions and one full day workshop per year.
# Customers	40 (approx.)
Methodology	Following the review of the online customer panel (A4) and the customer segmentation (B1) a core of engaged online panel members were identified to form a 'customer forum group' who meet face to face. The meetings are held at Bristol Water offices on weekday evenings and last between one and two hours. The content of the meetings are based on the decision-making needs of Bristol Water at the time, giving a forum for Bristol Water to consult with customers who are relatively well acquainted with the company.
Outputs	Outputs from each forum are outlined below:
September 2017 - Long term strategy.	This workshop asked customers "what should Bristol Water's company focus be". The most popular focus areas from across the group were: environmentally sustainability; affordability; reliability; and quality. Customers also gave their insights on the local area – in terms of the challenges and opportunities they anticipate Bristol facing over the next 30 years.
Report	**A3a. Customer Forum September 2017**
January 2018 – Small company premium and special cost factors	This workshop asked customers about "the pros and cons of being served by a small company compared to a large company". Some customers recognised the benefits but only a few felt this should be reflected in their bills. Many focussed on the size of bills rather than the impact of small company financing costs. Customers were also asked about special costs factors, expressing mixed views on whether smaller companies' additional costs should be passed on to customers and whether the costs of debt financing and equity were within management control. Environmental measures, costs of complex treatment processes and diseconomies of scale were most strongly felt to be outside management control.
Report	**A3b. Customer Forum January 2018**
March 2018 – business plan	This longer event, which we held on a Saturday morning, asked customers about investing in improving services versus keeping bills low, different levels of service

options	(including the effect of a lack of investment) and customer priorities. Customer's appetite for investment decreased as bills increased. They prefer investment in service which delivery efficiencies and do not prioritise customer service. Looking at individual services resilience appears to matter most to customers, although reliability matters most when looking at broad areas.
Report	**A3c. Customer Forum March 2018**

A3 Customer Forum		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	When discussing Bristol Water as a small company, most participants said they were happy with their current bill level. Only a few felt the benefits of being served by a small water company should be reflected in their bills. When discussing investment in services, participants' appetite for investment generally decreased as their bill levels increased, and they tended to support high investment over medium investment if the cost difference was seen as less significant.
You get the best possible experience every time you need us	Achieving customer excellence	Customer service is often prioritised least compared to resilience and reliability as in general it is perceived as being good already.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	Water poverty discussions attracted mixed views. Some were willing to pay more to help those struggling to pay, but others questioned if this was Bristol Water's responsibility. Out of 40 participants, 14 rated this as a high priority, 12 as medium and 4 as low.
Saving water before developing new supplies	15% leakage reduction	Leakage was one of the participants' highest priorities. They saw it as a future-proofing investment with the capacity to lower bills in the long-term.
	Metering and water efficiency promotion and support	Water efficiency was seen as a high priority, with participants recognising that water is a finite resource which needs to be preserved. Metering also scored highly, with participants describing it as 'fair' and 'environmentally friendly', but some strong concerns remained about potential bill increases.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Recreational sites were at the bottom of participants' priorities. Whilst acknowledging their educational and community value, they felt there were more important issues to focus on.
	Building biodiversity and protecting our environment	Water environment and biodiversity were seen as lower priorities when compared to leakage or renewable energy. Renewable energy was viewed as a high priority, future-proofing investment with the capacity to lower bills in the long-term.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Water quality was the top priority for participants who felt that everything else was a secondary consideration. 28 out of 30 participants said that this was a high priority. The remaining two felt that the legal standards already in place were sufficient.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Reliability as a package is rated highly as a priority. However, in terms of individual services, supply interruptions were a relatively low priority compared to water quality. Some participants felt that interruptions were inevitable, and Bristol Water should focus on quick restoration and efficient communication. 14 our of 30 participants said that supply interruptions were high priority.
	Resilience – boosting protection for population centres of more than 10,000	Local resilience was viewed as a high priority and an area where Bristol Water can make a real difference.

Qualitative data from 40 participants (some participants did not respond to all areas)

High contribution
Medium contribution
Low contribution

A4. Online Customer Panel

Objectives	**To generate robust customer insights on a regular basis, allowing tracking of changes over time** **To contribute to the triangulation of evidence on a range of topics**
Drivers	Business case: an online panel can be a very cost-effective approach to ongoing engagement Regulatory: use of ongoing customer research
Service attributes	Customer priorities and satisfaction with service
Timescale	Quarterly (approx. – sometimes timescales shift to consider holiday periods, or additional panels are scheduled for specific needs such as dWRMP consultation etc)
# customers	Approx 1,600
Methodology	About every quarter, we carry out a simple online survey quarterly, with questions tied to other customer engagement in that quarter to triangulate Response numbers vary but are always over 700 and can be up to 1,600.
Outputs	Outputs from each survey are outlined below
April 2016 – Customer priorities	N=1600. Panel members prioritised reliability, water quality, and leakage. They considered meeting the water needs of a growing population, improving the environment, and improving water efficiency as key goals for Bristol Water. Panel members identified use of mobile apps and social media for improving customer service.
Report	**A4a. Online Customer Panel April 2016**
June 2016 – Roadworks and communication methods	N= 1.300 69% of panel members said that they would not prefer an increase in their bill in exchange for re-opening roads sooner. 64% they would be willing to pay an extra £10 on their bill for roadworks to be carried out on weekends, rather than weekdays, with 33% willing to pay between £20-£30 extra per year. Customers also told us about their preferred methods of communication, which involved using an SMS service for roadwork alerts, a preference for an electronic copy of WaterTalk, and support for the idea of Live Chat on our website.
Report	**A4b. Online Customer Panel June 2016**
December 2016 – Testing priorities	N = 1100. We tested our customer priorities from earlier in the year to see if opinions had changed. Customers still prioritised a safe, reliable supply of water, water that tastes and smells good, and reducing leakage.

Report	**A4c. Online Customer Panel December 2016**
March 2017 – Use of Bristol Water's lakes and opinions on drought and related messaging.	N= 1019. 39% of customers visit Bristol Water's lakes at least once a year. Most felt that they should only promote more usage where there is a minimal impact on wildlife. The "drought warning" image was preferred by customers regarding drought messaging and they expressed a preference for TV, radio, and letters for communication regarding drought.
Report	**A4d. Online Customer Panel March 2017**
July 2017- Outcomes and performance commitments	N = 863. Panel members generally agreed with the proposed outcomes, although requested "operationally resilient" should be communicated in clearer language. Most members agreed with including commitment to the community as a performance commitment. There wasn't consensus over how to measure the service provided to vulnerable customers.
Report	**A4e. Online Customer Panel July 2017**
December 2017 – Customer service expectations and experience	N = 700. Customers were most likely to contact us by email (86% very/quite likely), telephone (74%) or via the website (74%). If customers had no water the would be most likely to check the Bristol Water website (35%) or ask a neighbour (31%). 80% of customers were happy to have their meter read every 6 months. Over half of customer felt Bristol Water's customer service was the same as other Utilities (54%) but 44% felt it is better and just 3% felt it is worse.
Report	**A4f. Online Customer Panel December 2017**
March 2018 - Business plan options	N =1,524 . Customers felt that helping customers save water was one of the most important parts of their customer experience – with how we compare to other service providers being the least important. Customers valued water quality very highly, as well as fixing leaks. If bills stayed the same, over half of customers would be willing to pay another £8 on their bill for improvements to service. If the bill was lower, more people would be prepared to pay £18 more, but most would choose to stay the same at £8 more. If the bill increased, customers preferred not to pay additionally for service improvements.
Report	**A4g. Online Customer Panel March 2018**
April 2018 – Draft business plan	N = 1377. Customers were most in agreement with keeping the water flowing (98% strongly agree/agree) and least in agreement with helping improve your community (59%). 55% preferred the suggested improvement plan for excellent customer service while 40% preferred the slower plan and 5% the faster plan. For local community and environmental resilience 59% preferred the slower plan, 30% the suggested plan and 11% the faster plan. For safe and reliable supplies it was 67% slower, 26% suggested and 7% faster. Overall, 46% preferred slower, 44% suggested and 10% faster. In regard

	to social tariffs, 73% support maintaining them at their current level, 51% support helping 75% of those who could benefit, whilst 40% support helping all those who could benefit.
Report	**A4h. Online Customer Panel April 2018**

A4 Online Customer Panel		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	In March 2018 customers were ask to choose between 3 options for service improvements for their preferred bill package with a varying average starting bill. Customer appetite for investment decreased as the starting bill increased.
You get the best possible experience every time you need us	Achieving customer excellence	In August 2017, 93% agreed that customers value a customer focused business. In December 2017, 54% said Bristol Water's customer service was the same as other utilities and 44% felt it was better. In March 2018, customers said that customer experience was the least important service area after reliability and resilience, and that how Bristol Water's customer experience compared to other companies was the least important aspect of their customer experience. In April 2018, 59% said they would prefer the suggested plan for customer experience.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	In August 2017, there was no clear consensus on how the service provided to customers who need extra support should be measured. In April 2017, 75% of participants agreed that we should be supporting those who can't afford their bill and 86% agreed that encouraging regular payments, no matter how small, is the right approach to encouraging people to pay. 73% supported keeping the social tariff at its current level, 51% supported helping 75% of those who could potentially benefit and 40% agreed with helping all those who could benefit.
Saving water before developing new supplies	15% leakage reduction	Leakage is consistently a top priority for the panel. In April 2018, 47% said they preferred the slower plan for leakage.
	Metering and water efficiency promotion and support	In March 2018, customers said that water efficiency (helping customers be aware of their water use and how to reduce it) was the most important aspect of customer experience. In December 2017, 80% said they would be happy having their water meter read every 6 months. Those who were not happy with this mostly wanted more frequent readings. In April 2018, 62% said they preferred the slower plan for water use.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	In August 2017, 86% agreed that commitment to the local community should be a key priority area and performance commitment, but in April 2018, improvements to the community were respondents' lowest priority and 68% said they preferred the slower plan. In our March 2017 survey, 39% said they visit Bristol Water's lakes at least once a year, but most felt increased usage should only be encouraged if there is minimal impact on wildlife. In March 2018, customers said recreational sites were the least important aspect local environment and resilience.
	Building biodiversity and protecting our environment	In August 2017, 91% agreed that customers value a sustainable business. In April 2018, 49% said they preferred the slower plan for the local environment.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	In April and December 2016, water quality was a top priority for the panel. 63% would want the water turned back on even if discoloured if it had been off for 12 hours, and 45% no matter how long it had been off for. In March 2018, customers said that water quality was the most important aspect of reliability, but that discolouration was the least important. In April 2018, 58% said they preferred the slower plan for water quality and 53% the slower plan for the appearance. 42% preferred the suggested plan for the taste or smell of water.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Reliability is consistently a top priority for the panel, although 75% said they preferred the slower plan for supply interruptions in the April 2018 survey.
	Resilience – boosting protection for population centres of more than 10,000	In August 2017, 89% agreed that customers value an operationally resilient business. In April 2018, 59% preferred the slower plan for protection against a major water supply event.

High contribution
Medium contribution
Low contribution

A5. Annual customer survey

Objectives	**To understand customer perceptions of Bristol Water as a company, and their priorities for their service**
Drivers	Business case: provides evidence to tailor BW services and communications Regulatory: use of ongoing customer research
Service attributes	All
Timescales	Conducted between January and March each year
# customers	1,000
Methodology	Online/telephone survey
Outputs	Outputs from each survey are outlined below
March 2014	N = 1000. Customers prioritised safe drinking water that smells, tasks, and looks good as being most important to them, followed by reliability of supply, fixing leaks, and ensuring adequate pressure. Areas for improvement were identified as keeping customers informed of how money is used, resolving enquiries promptly and efficiently, and value for money. 81% of customers were very or fairly satisfied with the value for money Bristol Water provided, and 83% rated Bristol Water's reputation as very good or good.
Report	**A5a. Annual customer survey 2014**
March 2015	N = 500. Customers prioritised water that smells, looks, and tastes good, reliability of supply and value for money as their top three service priorities. They also prioritised fixing leaks. 69% of customers were very or fairly satisfied with the service they received, and 67% rated Bristol Water's reputation as very good or good. Areas for improvement included ease of transferring account, helping people who cannot afford to pay bills, and protecting the environment.
Report	**A5b. Annual customer survey 2015**
March 2016	N = 1000. Customers prioritised affordable bills. Attention should also be given to helping protect the environment and resolving enquiries promptly as these were on the border of being priorities. 83% of respondents rated Bristol Water's service as excellent, very good or good, whilst 71% rated the value for money of Bristol Water's service as very good or good and 75 rated Bristol Water's reputation as a service provider as very good or good. There was a high overall level of satisfaction with the service offered by Bristol Water and 67% believed that Bristol Water's service compares very/quite well with other

	utility providers.
Report	**A5c. Annual customer survey 2016**
April 2017	N = 1,000. Customers prioritised reliability, water quality, and affordability. They had high satisfaction for the first two of these service attributes, but low satisfaction with regards to affordable bills. 86% of respondents rated the service received from Bristol Water as either excellent, very good or good. The main reasons for dissatisfaction included poor water quality, expensive bills and poor quality of work carried out. 78% rated the value for money from Bristol Water as either good or very good. 82% rated Bristol Water's reputation as a service provider as either very good or good. 69% think that Bristol Water compares very or quite well with other utility providers.
Report	**A5d. Annual customer survey 2017**
February 2018	N = 1,000. Customers prioritised affordable bills, carrying out work efficiently, keeping customers informed of planned work, reducing traffic disruption and resolving enquiries promptly. These issues appear to relate to infrastructure repairs. 87% of respondents rated the service received from Bristol Water as excellent, very good or good. 84% of respondents rate Bristol Water's reputation as a service provider as very good or good. There is a high overall level of satisfaction with the services offered by Bristol Water and 74% believe that the service received from Bristol Water compares very/quite well with other utility providers. Just 5% would switch water provider if they could and the mean likelihood of recommending Bristol Water was 8. The majority of respondents also placed a high importance on environmental and biodiversity efforts. 98% felt that a water company should be either very or quite involved in supporting environmental/biodiversity protection. The majority believed that Bristol Water performed well on each. 79% rate the value for money of Bristol Water's service as very good or good.
Report	**A5e. Annual customer survey 2018**

A5 Annual Customer Survey		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Affordable bills are consistently a high priority for customers. 89% said this was very important in 2018. Customers also have low satisfaction with affordability, with 19% saying Bristol Water were performing very well in this area in 2018.
You get the best possible experience every time you need us	Achieving customer excellence	Customers feel it is important that Bristol Water responds quickly in an emergency that customers are kept informed during planned work, that it is easy to contact Bristol Water and that problems are solved promptly. However, these are not as high priority as reliability, water quality, leakage or affordability.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	Helping customers who cannoy pay bills is a relatively low priority for customers. 25% said this was very important in 2018, a decrease from 61% in 2017.
Saving water before developing new supplies	15% leakage reduction	Repairing leaks as quickly as possible is consistently a high priority for customers. 93% said this was very important in 2018. It is not an area in which Bristol Water are perceived to be perfoming well.
	Metering and water efficiency promotion and support	Increasing the number of customers on a water meter and supporting customers to use less water are low priorities for customers. These are also areas where Bristol Water are not perceived to be performing well, with 3% and 6% respectively saying that we were performing very well in these areas in 2018.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Contributions to the community are a relatively low priority for customers. 38% said this was very important in 2018. It is also not an area in which Bristol Water are perceived to be performing well.
	Building biodiversity and protecting our environment	Protecting the environment is less of a priority that reliability, water quality, leakage and affordability. 76% said this was very important in 2018.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Water which looks, tastes and smells good is consistently one of customers' top priorities, with 90% saying it was very important in 2018. It is also an area in which they are perceived to be performing well, with 77% and 70% saying that we were performing very well for appearance and taste respectively.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	A regular and reliable supply of water is consistently one of customers top priorities, with 94% saying it was very important in 2018. It is also an area in which Bristol Water are perceived to be performing well, with 85% saying we were performing very well in 2018.
	Resilience – boosting protection for population centres of more than 10,000	Customers feel it is important that Bristol Water responds quickly in an emergency, with 89% saying this was very important in 2018. However, having a clear plan for how to maintain supply during a drought is not a high priority, with 20% saying this was very important in 2018.

	High contribution
	Medium contribution
	Low contribution

A6. ICS Benchmarking survey

Objectives	**To benchmark Bristol Water's performance on customer service against an external standard**
Drivers	Business case: provides external validation of commitment
Service attributes	Performance
Timescales	Jan – Mar – yearly
# customers	Benchmarking: 200 HH per year ServCheck: 72 BW staff
Methodology	Benchmarking: Telephone survey of 100 people who have contacted Bristol Water ops and 100 people who have contacted Bristol Water billing. ServCheck: Online survey of BW staff to measure the commitment to customer service
Outputs	Outputs from each survey are outlined below
2017	Benchmarking: We scored 83.6 compared to the UKCSI overall of 77.8 and the average utilities score of 74.4 Our net promoter score was 41.7 compared to the UKCSI overall average of 77.8 and the average Utilities score of 74.4 Our customer effort score was equally positive at 3.5 compared to the UKCSI overall average of 4.9 and the average Utilities score of 4.8 ServCheck: We scored 67.95 overall which is just off the overall average of 70.97 and the Utilities average of 72.74
Report	**A6a. ICS benchmarking survey summary 2017** **A6b. ICS benchmarking survey 2017** **A6c. ICS infographic 2017** **A6d. ICS Servcheck 2017**
2018	Benchmarking: We scored 81.16 compared to the UKCSI overall of 78.1 and the average utilities score of 74.4 Our net promoter score was 17.5 compared to the UKCSI overall average of 15.3 and the average Utilities score of -8.0. Our customer effort score was equally positive at 3.9 compared to the UKCSI overall average of 4.9 and the average Utilities score of 5.0 ServCheck: We scored 72.08 overall which is just off the utilities average of 72.74 and

	higher than the all sectors average of 70.97.
Report	**A6f. ICS benchmarking survey summary 2018** **A6e. ICS benchmarking survey 2018**

A6 ICS Benchmarking Survey		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	Bristol Water's UKCSI index score was 83.6, compared to a UKCSI overall average of 77.8 and a utilities sector average of 74.4. Bristol Water's top five scores were for helpfulness of staff (in person and over the phone), competence of staff (in person and over the phone) and product reliability. The bottom five scores were for outcome of complaint, speed of resolution, handling of complaint, cost and staff doing what they say they would do. However, for all of these except outcome and cost Bristol Water are nonetheless above the UKCSI overall average score.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

High contribution
Medium contribution
Low contribution

A7. UK Customer Satisfaction Index

Objectives	**To benchmark Bristol Water's performance on customer service against an external standard**
Drivers	Business case: provides external validation of commitment
Service attributes	Performance
Timescale	Bi-annual (January and July)
# customers	45,000 survey responses (6,000 of which are from the utilities sector)
Methodology	A bi-annual survey online survey of consumers which is demographically representative of the UK population.
Outputs	Outputs from each index report are outlined below.
Jan 2018	The utilities sector's customer satisfaction index (CSI) is 3.7 points below the all-sector average of 78.1. However, Bristol Water has the third highest UKCSI score in the utilities sector with 77.4.
Report	**A7a. UKCSI Utilities Sector Report January 2018**
Jul 2018	The utilities sector's CSI is 3.2 points below the all-sector average of 77.9. However, Bristol Water has the third highest UKCSI score in the utilities sector with 79.6.
Report	**A7b. UKCSI Utilities Sector Report July 2018**

A8. Annual stakeholder survey

Objectives	To understand the views of Bristol Waters stakeholders on the business
Drivers	Business case: understanding stakeholder attitudes to Bristol Water is essential to managing corporate reputation
Service attributes	Priorities and perceptions. Should also specifically include questions around innovation and biodiversity and the environment.
Timescale	Annually, usually between March and June
# customers	34 in depth stakeholder interviews 418 online survey to businesses & stakeholders (370 in 2016)
Methodology	Mix of online quantitative and telephone qualitative to capture a broad set of trackable measures and in depth information
Outputs	Outputs from each survey are outlined below
2016	N = 35 interviews, survey completed by 271 businesses. 82% regard the service that they receive from Bristol Water as excellent, very good or good. 70% felt that Bristol Water compared very well or quite well to other utility providers. 66% said that Bristol Water is good or very good to do business with. Bristol Water are considered to be very easy to deal with at all levels up to director level. A number of staff were praised for their professionalism, ease of contact, enthusiasm and attention to detail and always being well prepared for meetings. Many respondents had noticed that there were a number of new people who have recently joined who are doing a lot to keep engaged and some respondents commented that the staff go over and above what is required.
Report	**A8a. Annual stakeholder survey 2016**
2017	N = 38 interviews, survey completed by 384 businesses. 85% regard the service that they receive from Bristol Water as excellent, very good or good. (82% in 2016). Business customer 85%, Stakeholders 89% (Excellent, very good or good, N/A excluded for stakeholders) 72% felt that Bristol Water compared very well or quite well to other utility providers. (70% in 2016) 72% said that Bristol Water is good or very good to do business with. (66% in 2016). Business customer 69%, Stakeholders 83% (Very good or good, N/A excluded for stakeholders) The majority of respondents commented that Bristol Water are very easy to deal with

	and could be relied upon to provide a professional, efficient and high quality service.
Report	**A8b. Annual stakeholder survey 2017**
2018	N = 30 interviews, survey completed by 259 businesses. 86% regard the service that they receive from Bristol Water as excellent, very good or good. (85% in 2017). 60% felt that Bristol Water compared very well or quite well to other utility providers. (72% in 2016) 70% said that Bristol Water is good or very good to do business with. (72% in 2016). There was an overwhelming recognition that Bristol Water deliver their core service of providing water extremely well. Their excellent communication and responsiveness was praised and they were seen as being both engaging and approachable. It was clear that businesses and stakeholders value the staff that they interact with, and have built up strong relationships.
Report	**A8c. Annual stakeholder survey 2018**

A8 Annual Stakeholder Survey		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	Most businesses and stakeholders regard the service they receive from Bristol Water as good, very good or excellent, that Bristol Water compares very well or quite well to other utilities providers and that Bristol Water is good or very good to do business with.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

High contribution
Medium contribution
Low contribution

A9. Market engagement days

Objectives	**To engage with developers and SLPs on an ongoing basis, continuing to develop a positive working relationship** **Adding developer/SLP voice to rich picture of customer priorities**
Drivers	Regulatory: developer/SLP relationship highlighted as problem area historically
Service attributes	N/A
Timescale	Bi-annually from March 2017
# customers	March 2017 – 18 Nov 2017 - 16
Methodology	Our Developer/SLP team coordinate developer days with agenda set jointly to include developer/SLP priorities, practical knowledge sharing, and session coordinated with PR19 engagement team each time
Outputs	Outputs from the workshops held are outlined below:
Q1 2017	This workshop included a session on Developer and SLP priorities, as well as discussions on business planning, site issues, and retail separation. Participants informed us that timescales and quality are of equal importance, and that they were happy about the speed with which Bristol Water processes applications. Participants gave feedback on Bristol Water's charging mechanism, recommending transparency and justification for infrastructure changes. We also received feedback on the complexity of our forms, and recommendations for more communication early in the process to mitigate issues on site.
Report	**A9a. Market engagement newsletter March 2017**
Q3 2017	This workshop focused on discussions around the Bristol Water website, D-MEX & new charging mechanism, retail separation, site issues. Following on from the previous day, we published a charging arrangement document for the new changes mechanism. We discussed the DMEX measure, and asked for their feedback via an Ofwat pilot. We also received requests to produce our designs in CAD.
Report	**A9b. Market engagement newsletter November 2017**

A9 Market Engagement Days		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	Participants said that timescales and quality were of equal importance, and that they were happy with the speed with which Bristol Water processes applications and sends quotes. They recommended transparency in charging mechanisms and justification for infrastructure changes.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

	High contribution
	Medium contribution
	Low contribution

A10. Staff roadshows

Objectives	**To understand how Bristol Water staff views on priorities etc. may differ from customers** **To support the development of a culture with customer engagement at its heart** **To tap into the creativity and expertise of Bristol Water staff to develop customer engagement that is innovative and effective**
Drivers	Business case: Bristol Water staff are one of its main assets and can all contribute to making the business more customer focused
Service attributes	Range of priorities and also customer perceptions
Timescale	November 2016 September 2017 February 2018
# customers	All BW staff
Methodology	Creative exercises are developed for each session to invite feedback on the latest stage of the business plan process and on opportunities for customer engagement
Outputs	• Roadshow 1: November 2016 – Develop. At this event we discussed key PR19 themes including great customer service, affordable bills, innovation. We also discussed how we were engaging with customers and stakeholders. • Roadshow 2: September 2017 – Own. Here, we talked to staff about how we were shaping our business plan with the help of employee, customers, and stakeholder participation. • Roadshow 3: February 2018 – Deliver. At this event, we discussed how we are ensuring our business is fit to deliver, how we are responding to regulatory requirements, who are delivery partners are, and how we are talking about our plan.
Report	No report produced.

A11. Summer roadshows

Objectives	**To engage the widest possible base of customers in Bristol Waters strategic plans**
Drivers	Regulatory: direct local engagement with a wide range of customers continues to be a priority Business case: supports customer perceptions of Bristol Water
Service attributes	N/A
Timescale	Annual during summer months to capture local events
# customers	>1,000 140 completed online scenario game (2017) 700 responses to draft business plan consultation (2018)
Methodology	In the summer months, we take our water bar to various locations around our supply area, often at festival and local events. We use these opportunities to chat to customers about key priorities and issues they care about, and also to test different ways of collecting opinions on the building blocks of our business pan. Events in 2017: 8th June – Bristol Pride – Harbourside 26th June to 2nd July – Keynsham 29th July to 31st July – Upfest – Southville 9th to 12th August – Bristol International Balloon Fiesta – Ashton Court Estate 17th September – Peaceful Portway – Bristol Portway Events in 2018: 26th April – Varsity – Harbourside 11th to 13th May – Foodies Festival – Durdham Downs 9th to 10th June – Bristol Festival of Nature – Harbourside 14th June – Bristol Pride – Harbourside 14th to 17th June – Forest Live – Westonbirt Arboretum 23rd to 24th June – Dogfest – Ashton Court Estate 25th June to 1st July – Keynsham Music Festival – Keynsham 6th to 8th July – Backwell Festival – Backwell 28th to 30th July – Upfest – Southville 3rd to 5th August – Valley Fest – Chew Valley Lakes 9th to 12th August – Bristol International Balloon Fiesta – Ashton Court Estate
Outputs	There are no formal outputs from these events, but we often capture video footage – a selection of links have been provided below.
2017	Events attended: Bristol Balloon Fiesta, Upfest, Keynsham, Bristol Pride, Peaceful Portway https://youtu.be/0XzDXzLgAZk - Bristol Balloon Fiesta 2017 https://www.youtube.com/watch?v=-aBZYL0ao5I&list=PLTMortSCiUMRMeECA0BF6evyjtKKGn85k – Keynsham festival 2017

	https://www.youtube.com/watch?v=6-gWzt87lX4&list=PLTMortSCiUMRMeECA0BF6evyjtKKGn85k&index=2 – Bristol Pride 2017 https://www.youtube.com/watch?v=neX798e8WXI&index=3&list=PLTMortSCiUMRMeECA0BF6evyjtKKGn85k = Upfest 2017
2018	Events attended: Bristol Foodies Fest, Varsity, Bristol Pride, Forest Live, Bristol International Balloon Fiesta, Backwell Festival, Bristol Festival of Nature, Keynsham Music Festival, Upfest, Valley Fest, Dogfest.

A12. Youth board

Objectives	To engage future customers in the development of Bristol Water's business plan and potential future activities
Drivers	Regulatory: Ofwat encourage companies to engage with future customers to inform their business planning.
Service attributes	Water efficiency
Timescale	April 2018 and regular thereafter
# customers	19
Methodology	A group of young people aged 16-17. The panel was introduced to the company, and given an insight into how Bristol Water operates, through the eyes of a Bristol Water "mentor". They were then given a challenge around water efficiency and asked to develop ideas to solve a particular problem. When reconvened, the panel (in groups) pitched their ideas. Bristol Water representatives then pitched various options for the business plan to the young people to hear their preferences and feedback. An eleven-question online survey was also conducted with all schools participating in the Bristol Water Youth Board.
Outputs	Outputs from the workshop with the panel and from the school survey are shown below.
Workshop	Teams pitched a smart shower head and app, a marketing campaign to reduce shower time, a memetic marketing campaign and smart water meter app. Themes from all presentations were use of smart technology and social media, focus on showering and age targeted messaging. BW presented three investment areas to youth board: customer service, reliability and local resilience. Reliability given highest priority on average, but mixed responses with not clear consensus.
Survey	In the online survey reliability was also given the highest priority and customer service the lowest. 59% of young people said reliability was their top priority whilst 61% said that customer service was their lowest priority. Views on resilience were mixed, with 34% suggesting it was their highest priority and 26% their lowest. When asked about expectations, 91% said it is very important to provide a regular and reliable supply of water. More than two-thirds of students said it is very important that Bristol Water help protect the environment. Statements that don't relate to the core business functions are seen as less important. The most negative responses were given to statements where the customer benefit is less clear, such as community

	contributions or an increase in the number of customers with water meters. Around half of students have positive impressions of Bristol Water and very few have negative associations.
Report	**A12. Youth board**

A12 Youth Board		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	The Youth Board overall gave customer service a lower priority than reliability or local resilience. They said it was important but nice to have, not necessarily a priority. The School Survey respondents said that customer service was a business function to support the supply of water, and was therefore less important than other investment areas.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	Water poverty was viewed as a high priority by the youth board, although some saw this as Bristol Water's responsibility. A third of School Survey respondents said that helping people who cannot pay bills was very important.
Saving water before developing new supplies	15% leakage reduction	Leakage was viewed as a high priority by the youth board, who said it is wasteful and demotivates customers to save water. Two thirds of School Survey respondents said that fixing leaks as quickly as possible was very important.
	Metering and water efficiency promotion and support	Water efficiency was viewed as a high priority by the youth board. Metering was viewed as less of a priority in comparison, but seen as something which further encourages water efficiency. Increasing the number of customers on a water meter is one of the lowest priorities for respondents to the School Survey, who gave their most negative responses where the customer benefit of a measure was less clear.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Recreational sites are seen by the youth board as something which would be nice to have, but not a priority. Contributions to the community were one of the lowest priorities for respondents to the School Survey, who gave their most negative responses where the customer benefit of a measure was less clear.
	Building biodiversity and protecting our environment	The Youth Board said water environment and biodiversity were key for sustainability, but these were given a lower priority than other aspects of local resilience, such as water consumption or leakage. More than two thirds of respondents to the School Survey said that it is very important that Bristol Water help protect the environment.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	The youth board saw water quality as the highest priority. However, discoloured water was viewed as a low priority as it was perceived as having a lower impact on customers. Two thirds of School Survey respondents said that providing water which tastes and looks good and has no smell was very important.
	Reducing supply interruptions to 1.8 minutes per customer	Supply interruptions were seen as a medium priority by the youth board. The two highest priorities for respondents to the School Survey were a regular, reliable supply of water and quick responses to water supply emergencies. 91% felt it was very important ro provide a regular and reliable supply of water.
	Resilience – boosting protection for population centres of more than 10,000	Overall, resilience was given a lower priority than reliability but a higher priority than customer service by the youth board. They believe it helps meet the needs of tomorrow, but that today's supply should be a higher priority. Respondents to the School Survey also felt that local resilience was a lower priority than reliability but a higher priority than customer service.

	High contribution
	Medium contribution
	Low contribution

A13. Staff online panel

Objectives	**To understand how staff views align with customer views** **To understand how staff perceive Bristol Water's performance** **To better involve all staff in understanding customer engagement and involvement**
Drivers	Regulatory: Responds to encouragement from Ofwat for engagement to be embedded throughout the business Business case: Bristol Water staff are one of its main assets and can all contribute to making the business more customer focused
Service attributes	Performance, customer perceptions
Timescale	Jul - Sep (or can be spread out across year) *Note – this was tentatively planned for 2017 but not delivered.*
# customers	50 staff from across the business
Methodology	To be paired with the customer online panel
Interdependencies	A4 – Online customer panel
Outputs	Outputs from surveys are outlined below:
April 2018 – Business plan options	N = 42. Staff have similar views to customers on customer experience, although customers think water poverty should be more of a priority and staff feel increasing the number of people with a water meter is important. For reliability, staff place a higher importance than customers on supply interruptions and less importance on water quality. For local environment and resilience, both staff and customers see maintenance of recreational sites as the lowest priority and leakage as the highest. Overall, both staff and customers feel reliability is the most important service attribute, but staff say that local environment is the lowest priority, while customers say it is customer experience.
Report	**A13a. Staff online panel March 2018**
May 2018 – Draft business plan consultation	N = 30. The staff panel agree with the customer panel that keeping water flowing is the most important ambition and helping to improve the community the least. Across all of the performance commitments in the Customer Experience, Local Community and Environmental Resilience, and the Safe and Reliable Supply outcomes, a smaller proportion of staff chose the slower plan than customers. Overall, most staff prefer the suggested plan. A slightly smaller percentage of staff agree (39%) or strongly agree (25%) with supporting 14,500 customers with low incomes through social tariffs than customers

	(44% and 29% respectively). However, when asked about supporting 75% of those who could benefit 54% of agree and 21% strongly agree compared to 34% and 17% of customers. Similarly, 31% agree and 28% strongly agree with support all those who could benefit from social tariffs, compared to 23% and 17% of customers.
Report	**A13b. Staff Online Panel May 2018.**

A14. Debt advice workshops

Objectives	**To strengthen our relationship with our debt advice partners** **To understand key issues that affect customers in vulnerable circumstances** **To engage our partners in the development of our plans and provide updates of performance**
Drivers	Regulatory: Ensuring we are working with partners to support vulnerable customers Business case: To better support customers to be able to pay their bills Social: To support those struggling by providing services and options to help them pay their bill
Service attributes	Affordability & vulnerability
Timescale	January/February each year
# customers	Around 30 debt advice partners
Methodology	We annual debt advice workshops are mandatory for all of our funded partners to attend. The agenda includes providing an update on our annual progress (including our bills, schemes, performance and funding) as well as practical knowledge sharing, and sessions coordinated on future planning and continuous improvement. As part of our drive to improve our partnerships and relationships we also regularly seek feedback through engagement visits.
Outputs	Outputs from the workshops held are outlined below:
February 2018	We talked to our partners about how we can improve the sign up process to our PSR and suggestions included PSR sign up box on our social tariff applications forms, providing each partner with a crib sheet explaining what it is for, providing case studies of how PSR has helped in our materials. We also wanted to know about how we can improve the targeting of those on Priority Services Register (PSR) and suggested included automatic approaches with flags indicating when a customer may be eligible, working more closely with councils to target blue badge holders. We also asked about how we can raise awareness of our social tariffs. Suggestions included targeting customers on universal credit, including information in tenancy packs, working with local authorities to use data such as bedroom tax, free schools meals and housing associations.
Report	**No report was produced, feedback incorporated directly into the relevant strategies**

A15. Retailer engagement

Objectives	**To engage with retailers on an ongoing basis, continuing to develop a positive working relationship** **Adding retailer voice to rich picture of customer priorities** **To engage our retailers in the development of our plans and provide updates of performance**
Drivers	Regulatory: Retailer relationship and improved customer service
Service attributes	N/A
Timescale	Regular face to face account/relationship meetings, which are scheduled on a minimum of a quarterly basis. Weekly operational calls are held with the largest retailer (customer base) in our area of supply Day to day interactions via wholesale service desk and account manager So far we have been seeking official survey feedback from retailers on a quarterly basis. But due to our structured meetings and daily communications, we do not wait for these survey results to act on any issues/concerns or innovate/provide new services
# customers	18 active retailers, 26 with signed contracts
Methodology	Our account manager coordinates the account/relationship visits. The agenda for these meetings are standard and cover performance (including complaints and financial) but we also include any new initiatives that we are developing, any feedback from recent operational incidents or events and any discussions around water resource, drought plans, industry consultations, water efficiency and most recently our PR19 plans. The retailers also nominate specific agenda items
Outputs	Outputs from the surveys are outlined below:
Survey 1 **August 2017**	The initial survey (survey monkey) covered the services/products we were providing to retailers. The first survey results received were very positive and we agreed to re-run the same survey later in the year. It also picked up on how we compared to other wholesalers in the market
Report	**A15a. Wholesale satisfaction survey 1&2 (Aug and Dec 2017)**
Survey 2 **December 2017**	The 2nd survey (survey monkey) followed the same questions as survey 1. Again the results were very positive. From this we agreed to carry out a more detailed survey as e completed our first year in the market
Report	**A15a. Wholesale satisfaction survey 1&2 (Aug and Dec 2017)**
Survey 3	1st year in the market survey (survey monkey) looking for more detailed feedback on

March 2018	specific areas of our service. This covered the responsiveness of our wholesale services team, our account management, our non-primary services, our retailer portal and the overall customer experience. The overall response was very positive again
Report	**A15b. Wholesale satisfaction survey 3 (March 2018)**
Survey 4 **April 2018**	This email survey followed on from an operational incident we had and wanted to capture our communications during that incident. Again the results were positive. Since the survey results and Ofwat's feedback from the "beast from the east" report, we have started using the recently published RWG good practice guide for unplanned works. This has been received very positively by our retailers, feedback below; Castle Water - *Clear and concise. All information required was on the form. Only 1 customer affected.* SES Business - *Happy with what we had sent, they like clarity and simplicity of the information.* Pennon Water Services - *Liked the form used. Simple and clear.*
Report	**No report was produced, feedback incorporated directly into improvement initiatives**
Survey 5 **July 2018**	This email survey was to capture any feedback around our proposed business plan for PR19. Feedback was positive and they supported our proposals, but retailers were receiving a lot of information on PR19 from all wholesalers in the market and would not have the resources or time to review in detail
Report	**No report was produced, feedback incorporated directly into improvement initiatives**

One-off engagement

We undertook a range of one-off engagement activities to understand customer views on specific issues relevant to our business plan.

B1. Customer segmentation and sampling frame

Objectives	**To refine our understanding of Bristol Waters customers** **To provide a framework within which future research can explore the variation in views among different customers**
Drivers	Regulatory: avoiding one-size-fits-all approach to customers Business case: improving our service to customers by tailoring it to customer needs and priorities
Service attributes	N/A – although this piece of work is specifically relevant to improving understanding of affordability
Timescales	June – July 2017
# customers	All
Methodology	We conducted a desk review of existing customer data (Bristol Water billing data, commercial segmentation data e.g. Mosaic), and then commissioned an external provider to conduct a statistical analysis to produce a segmentation model, and develop customer persona. We use this segmentation to ensure the engagement we do is representative of Bristol Water customers, and to consider differences between our customer groups – enabling us to target activities and messages more closely.
Interdependencies	Informs all research, A1. Customer dashboard (supported development)
Outputs	6 unique customer personas reflecting the different types of Bristol Water customer Young urban renters – 22%, Mature and measured – 22%, Social renters – 13%, Comfortable families –29%, Safely Affluent – 5%, Thirsty empty nesters – 8%
Report	**B1. Customer segmentation and sampling frame**

B2. Rapid evidence review

Objectives	**To understand engagement conducted to date** **To understand how we have been talking to our customers so far**
Drivers	Regulatory: proportionate – understanding a starting point from which to develop our future engagement Business case: review and learn from past activities
Service attributes	N/A
Timescales	December 2016
# customers	N/A
Methodology	We collected together available research and engagement conducted throughout PR14 and reviewed what it told us about our customers, as well as what had worked and hadn't worked in the past in terms of how we approached our research.
Interdependencies	All PR14 research
Outputs	This report demonstrated that we had a good range of research on customer priorities both from the last price review, and ongoing customer engagement, and a broad range of data regarding customer perceptions of the company. Particular gaps were identified, such as a lack of customer demographic data, as well as engagement with customers on longer term issues, such as resilience.
Report	**B2. Rapid evidence review.**

B2 Rapid Evidence Review		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Customers demonstrated that their priority was for the lowest bill or avoiding declining services rather than paying more for service improvements. Affordability was perceived to be an area for improvement.
You get the best possible experience every time you need us	Achieving customer excellence	Bristol Water performs higher than the industry average in terms of customer satisfaction. Resolving enquiries promptly was felt to be an area for improvement.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Leakage ranks consistently high as a customer priority in both qualitative and quantitative research.
	Metering and water efficiency promotion and support	Metering consistently is consistently ranked low as a customer priority, although feedback from qualitative research suggests that customers consider metering a higher priority following discussion. WTP research shows having a meter makes no difference to a customers' valuation of metering. Customers do not necessarily understand the system wide impacts of prioritising metering.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	Environmental concerns do feature in customer priorities, but not consistently, and often as an area for improvement.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Taste and appearance consistently ranked in customers' top three priorities across all qualitative research and received one of the higher values in the WTP.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Reliability of supply is consistently ranked in customers' top three priorities across all qualitative research and received one of the higher values in the WTP. Low pressure is consistently ranked low as a customer priority. Customers think that Bristol Water perform well for reliability and pressure.
	Resilience – boosting protection for population centres of more than 10,000	Hosepipe bans are consistently ranked low as a customer priority.

(dark blue)	High contribution
(medium blue)	Medium contribution
(light blue)	Low contribution

B3. Developing a PR19 societal valuation strategy

Objectives	**Develop a strategy to for the structuring of the programme of work to deliver the customer and societal valuations required for the PR19 business planning process**
Drivers	Business: To ensure efficient use of resources, and that valuation research is meeting business needs Regulatory: To ensure research is proportionate, and triangulated
Service attributes	All
Timescales	January 2017
# customers	N/A
Methodology	Review of valuation methods used by Bristol Water and the wider industry in PR14, review of the regulatory context and objectives, review of our customer and business priorities.
Interdependencies	B2. Rapid evidence review
Outputs	The outputs of this review guided our strategy for valuation research, which included: - Making best use of research we had already conducted, and had already been conducted across the industry, - Conducting further stated preference research on resilience, and alternative water resource options - Running stated preference questions as part of deliberative events - Estimating the value of lost economic output due to usage restrictions - Accounting for new guidance on environmental valuation of water resource options
Report	**B3. Developing a PR19 societal valuation strategy**

B4. Customer experience of attributes review

Objectives	**To draw together existing evidence about the priorities customers place on service attributes from ongoing customer data**
Drivers	Regulatory: ensuring that day-to-day customer contact is used to inform research priorities, and engagement is considered as an on-going process, integrated throughout business activities. Dashboard can also pull out data on particular customer segments e.g. vulnerable customers Business case: making the business more responsive to customer needs and priorities
Service attributes	All
Timescales	March 2017
# customers	>2,400
Methodology	We collected and compared data gathered from customers on a regular basis (i.e. inbound calls, complaints, SIM survey, replica survey, feedback cards, social media) to better understand their views on service attributes.
Interdependencies	A1. Customer dashboard (developed together), A44. Online Customer Panel (priorities), A5. Annual customer survey, A8. Annual stakeholder survey, A9. Market engagement days (priorities), B5. Customer priorities focus groups
Outputs	Overall, Bristol Water customers are happy with the service they receive and it compares favourably both within and outside the industry. The data provides a solid reasoning for continuing our business as usual operations in aspects where it is high customer priority but customers are satisfied by the level of service they receive. However, customers consistently rate Bristol Water's performance on affordability low whilst it is a top priority. The reduction in bills in 2015/16 had a small positive impact on customers' view on affordability, but it still ranks as one of the lowest performers. Research shows that customer prioritise having the lowest bills rather than paying for service enhancements. Leakage is the largest cause of dissatisfaction for customers. However, industry comparison shows that we perform in the top quartile for leakage. The dissatisfaction stems from the customers experience after reporting a leak. 72% of customers rated our service as providing good value for money, which is a positive increase from 70% in 2015/16. 94.9% of customers surveyed considered that it was easy to contact us by phone – this has remained fairly consistent over previous years. 81.7% of customers rated our reputation as very good or good which is an improvement on the score of 80% in 2015/16.
Report	**B4. Customer experience of attributes review**

B4 Customer experience of attributes review		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Customers prioritise bills which are affordable but Bristol Water's performance in this area is consistently rated as low. Research shows that customers prioritise having the lowest bills rather than paying for service enhancements. Customers on social tariffs generally prioritise affordable bills.
You get the best possible experience every time you need us	Achieving customer excellence	UKCSI score of 83.6% for customer satisfaction, compared to utilities sector average of 74.4% and national average of 77.8%. However, customers who express negative experiences with service attributes such as poor pressure and leaks often explain this as being due to poor communication.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Leakage is the largest cause of dissatisfaction for customers. However, Bristol Water perform in the top quartile for leakage. Dissatisfaction stems from customer experience after reporting a leak, with many customers saying they experienced a lack of communication, slow speed of resolution or lack of updates. Leakage often scores as high priority when offered as an option but is not raised as a priority during discussions.
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	The environment doesn't rank as one of the top priorities, but research suggests customers do value the environment. Annual surveys suggest that customers are not aware of the environmental efforts we make.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Customers prioritise high water quality. This has been consistent since the last price review.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Customers prioritise a reliable supply of water. This has been consistent since the last price review. Customers who have experienced supply interruptions in particular generally prioritise reliability.
	Resilience – boosting protection for population centres of more than 10,000	N/A

High contribution
Medium contribution
Low contribution

B5. Customer priorities focus groups

Objectives	**To update our understanding of what service attributes Bristol Water customers prioritise and why** **To feed in customer views to the first draft of the business plan** **To start to understand how different customer segments views may differ** **To better understand customer attitudes to leakage**
Drivers	Regulatory: involving customers early, ensuring research is proportionate
Service attributes	All (scoping study)
Timescales	Mar 2017
# customers	27
Methodology	3 x 90 minute focus groups, Group 1: Customers on a social tariff (7 customers) Group 2: Customers who experienced disruption (10 customers) Group 3: Control group (10 customers). Customers were initially asked an open question "What is a water company for?" to hear their opinions before being presented with different kinds of service attributes. Following this open session, customers were asked to rank their top ten out of 24 of Bristol Water's service attributes (these attributes were based on those included in the Annual Survey (8). They were then asked to share the reasons behind their choices and whether their choices changed during their discussions with other participants. Finally, customers discussed what communication and engagement channels with Bristol Water are preferred.
Interdependencies	A4. Online Customer Panel (priorities), A5. Annual survey, A8. Annual stakeholder survey, A9. Market engagement days (priorities), B4. Customer experience of attributes review, B2. Rapid evidence review
Outputs	Customers cared about affordability of water bills, and having a water supply that is safe to drink, and that looks and tastes good. Customers who had recently experienced disruption also prioritised reliability of supply. There was little consensus around other issues. Conserving water was mentioned by many participants as being important, but there were mixed opinions around metering, and little consistency in prioritising environmental issues and water efficiency. There were few conversations relating to leakage, or to droughts and water restrictions. Customers believed that Bristol Water had a responsibility to keep customers informed, but held mixed views regarding what they felt it was important to be informed about. Some expressed a preference for digital communication while others were more reliant on post and telephone.
Report	**B5. Customer priorities focus groups**

B5 Customer Priorities Focus Groups		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Affordability was prioritised by all three groups.
You get the best possible experience every time you need us	Achieving customer excellence	Participants believed Bristol Water has a responsibility to keep customers informed, but expressed a range of opinions on what information should be provided and the means of providing it.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	Most participants on a social tariff said that helping people who cannot pay their bills should be a priority.
Saving water before developing new supplies	15% leakage reduction	Leakage was rarely prioritised or discussed.
	Metering and water efficiency promotion and support	Water conservation was mentioned as being important, but views on metering were mixed. Some participants who had experienced service disruption felt they were necessary or useful tools, but others were not keen to have one installed.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Participants expressed strong views on Bristol Water's responsibility to the local and international community, but had mixed opinions on what this should involve. Some participants advocated education schemes and working more closely with schools.
	Building biodiversity and protecting our environment	Environmental issues were not consistently prioritised. Around half of the participants on a social tariff said environmental considerations should be part of providing a basic water service.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	A water supply which is safe to drink and which looks and tastes good was prioritised by all three groups.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	A regular water supply was a top priority for participants who had experienced disruption and for the control group.
	Resilience – boosting protection for population centres of more than 10,000	Droughts and water restrictions (including hosepipe bans) were rarely prioritised or discussed.

Focus groups with: customers on a social tariff (7 participants); customers who have experienced service disruption (10 participants);

	High contribution
	Medium contribution
	Low contribution

B6. PR19 Willingness to pay research

Objectives	**To provide up to date valuation data for a range of service attributes using the industry preferred method**
Drivers	Regulatory: providing adequate and proportionate valuation data
Service attributes	• Unplanned supply interruption 3-6h, 6-12h, 12-24h, >24h • Planned supply interruption 3-6h, 6-12h, 12-24h, >24h • Taste & odour not ideal (few days) • Discoloured water (few hours) • Occasional low pressure (3-6h per time) • Hosepipe ban (May-Sep) • Restriction on essential use of water (2 months) • Works causing road disruption in Bristol area (any duration)
Timescale	Mar – Aug 2017
# customers	• 1,016 x HH online interviews • 100 x HH in-home interviews with less engaged / vulnerable customers • 300 x non-household (NHH) CATI interviews
Methodology	The survey questionnaire was designed around two interlinked exercises: (1) a 'MaxDiff' exercise focussed on which types of service issue would have the most, and least, impact on respondents if they were to be affected by them; and (2) a 'Package' exercise focussed on high level trade-offs between service improvements or deteriorations and changes in the level of the bill.
Interdependencies	B3. Developing a PR19 societal valuation study, All valuation research on relevant attributes for triangulation in B20
Outputs	Respondents were not willing, on average, to accept any service deteriorations in exchange for bill reductions. In fact, in the context of a decreasing bill, in real terms, respondents would be unwilling to accept any deterioration in service, and would rather see any amount of service improvement than no service improvement. Once the bill change is in the positive range, however, respondents become cost sensitive. With respect to improvement packages, we found that households were willing to pay up to a total of £20.96 per year, on average, for an intermediate improvement package including both water and wastewater service improvements. This represents a decrease in WTP in comparison to the findings for PR14 where the corresponding WTP figure was £31 per household per year for water service improvements alone.

Household and non-household WTP for package improvements (£/year)

Variable	Household	Non-household
SQ to +1	£20.96	£151.64

	(£17.65 ; £24.24)[(1)]	(£124.49 ; £178.73)
+1 to +2	£12.16	£68.50
	(£9.52 ; £14.78)	(£14.78 ; £122.14)

Unit WTP values, by customer type

Service measure	Unit	Willingness to pay (£/unit)			
		Household		Non-Household	
		Central	Range	Central	Range
Water					
Unplanned supply interruption (3-6h)	case/prop	£136	(£115; £158)	£1,565	(£1,285; £1,845)
Unplanned supply interruption (6-12h)	case/prop	£287	(£242; £332)	£1,941	(£1,594; £2,288)
Unplanned supply interruption (12-24h)	case/prop	£293	(£247; £339)	£2,661	(£2,185; £3,137)
Unplanned supply interruption (>24h)	case/prop	£332	(£280; £384)	£3,464	(£2,844; £4,083)
Planned supply interruption (3-6h)	case/prop	£91	(£77; £105)	£706	(£580; £832)
Planned supply interruption (6-12h)	case/prop	£121	(£102; £140)	£1,007	(£827; £1,187)
Planned supply interruption (12-24h)	case/prop	£175	(£147; £202)	£1,138	(£934; £1,341)
Planned supply interruption (>24h)	case/prop	£154	(£129; £178)	£1,342	(£1,102; £1,582)
Taste & odour not ideal (few days)	case/prop	£147	(£124; £171)	£804	(£660; £948)
Discoloured water (few hours)	case/prop	£60	(£51; £70)	£353	(£290; £416)
Occasional low pressure (3-6h per time)	case/prop	£80	(£67; £93)	£338	(£278; £398)
Hosepipe ban (May-Sep)	case/prop	£38	(£32; £44)	£211	(£173; £249)
Restriction on essential use of water (2 months)	case/prop	£594	(£500; £687)	£4,361	(£3,580; £5,140)
Works causing road disruption in Bristol area (any duration)	case/prop	£67	(£56; £77)	£735	(£604; £867)

B6 - PR19 Willingness to Pay research - Quantitative valuation data from 1,016 customers		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Customers were overall willing to pay for service improvements, and did not want to see a deterioration of service linked to lower bills. Customers have a willingness to pay for services improvements of £20.96 for a +1 improvement package from the status quo and and £12.16 for a +1 package to +2 improvement package.
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	Customers were willing to pay an average central value of £38 to reduce the instance of hosepipe bans. This was one of the lower values given by customers.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Customers were willing to pay an average central value of £60 to reduce the instances of discoloured water and £147 to reduce the instances of water that doesn't taste or smell good (average central valuations)
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top	Customers were willing to pay an average central value of £91 to reduce the number of planned supply interruptions (average central valuation).
	Resilience – boosting protection for population centres of more than 10,000	Customers were willing to pay an average central value of £136 to reduce the number of unplanned supply interruptions that last between 3 and 6 hours. Customers also placed a high value (£594) on avoiding long-term water restrictions.

High contribution
Medium contribution
Low contribution

B7. Water resource research (willingness to pay part 2)

Objectives	**To provide up to date valuation data for a range of service attributes using the industry preferred method**
Drivers	Regulatory: providing adequate and proportionate valuation data
Service attributes	• Reduce leakage (from 84 to 76 litres / property / day) • Education on how to save water • Issue water saving devices to customers • Water transfers from neighbouring companies • Increase use of current water resources • Develop new water resources • Implement universal metering
Timescale	March – Aug 2017
# customers	573 with household customers, (50 face to face) 300 with non-household customers.
Methodology	The survey was a standard stated preference choice exercise, designed around the core idea that the utility of a water resources management plan, to a customer, can be decomposed into three factors: • the impact on the frequency of TUBs/NEUBs, • the impact on the customer's bill, and • the external costs/benefits of the supply-demand measures included within the plan. Respondents were asked to make a sequence of choices between options each representing a potential water resources plan. The options were accordingly characterised by the combination of supply-demand measures included and the impact on the level of service and on the customer's bill.
Interdependencies	B3. Developing a PR19 societal valuation study, B6. PR19 Willingness to pay research All valuation research on relevant attributes for triangulation in B20
Outputs	

Variable	Households [£/HH/year]	Non-Households [£/NHH/year]
Reduce leakage (from 84 to 76 litres / property / day)	£9.60	£39.85
Education on how to save water	£9.59	£17.84
Issue water saving devices to customers	£9.00	£19.29
Water transfers from neighbouring companies	-£2.28	£9.82
Increase use of current water resources	-£3.77	£12.92

	Develop new water resources	-£4.71	£7.88
	Implement universal metering	-£8.90	-£3.97
Interdependencies	May be possible to carry out secondary analysis using customer segments		
Report	**B7. Water resources research (WTP2)**		

B7 Water Resources Research (Willingness to Pay, part 2)		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	The highest WTP was for reducing leakage. Households would be willing to pay an additional £9.60pa for a leakage reduction from 84 to 76 litres/property/day.
	Metering and water efficiency promotion and support	The lowest WTP was for the implementation of universal metering. Households would expect a reduction of £8.90pa in their bills if this were implemented. However, customers expressed high WTP for education on how to save water and for water saving devices to be issues to customers. They would be prepared to pay £9.59pa and £9.00pa for these measures respectively.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

High contribution
Medium contribution
Low contribution

B8. Review of benefits transfer valuation evidence

Objectives	**To translate comparable evidence about costs/benefits related to service attributes from other sectors/contexts**
Drivers	Regulatory: triangulation of valuation findings
Service attributes	• Hosepipe ban, • Short & long interruptions to supply • Drought restrictions • Low pressure • Water quality – discolouration, taste and odour • Leakage • Low river flows • Water meters • Traffic disruption
Timescale	PR14 data Apr - Jun 2017
# customers	N/A
Methodology	The Benefits Transfer method involves "transferring" to the current context, any available valuation evidence from comparable studies that were completed in another location, at another time, or in another context. This study compares the results of Bristol Water's PR14 stated preference studies (Stage 1 and Stage 2) with the results from a range of alternative sources, including other companies' PR14 stated preference studies. This allows Bristol Water to benchmark the results emerging from its other Stated Preference and Revealed Preference research, to assess their robustness. All values are adjusted for inflation and are reported in 2017 prices
Interdependencies	B3. Developing a PR19 societal valuation study, All valuation research on relevant attributes for triangulation in B20
Outputs	Hosepipe ban, NEUBs, short interruptions to supply, drought restrictions, wide range of industry estimates, BW PR14 values in middle of range. Long interruptions to supply, leakage: wide range of industry estimates with BW PR14 values towards the top end of the range. Low pressure: Most industry values focus on persistent low pressure, but BW valued occasional low pressure, hence BW value at the low end of the range, consistent with other study looking at low pressure.

	Discolouration: wide range of estimates with Bristol Water's valuation estimates towards the middle of the range Taste and odour: BW PR14 values at the low end of industry range - but some very high industry valuations. Low river flows: BW PR14 valuations higher than industry values Water meters and traffic disruption: No comparable data
Report	**B8. Review of benefits transfer valuation evidence**

B9. Macroeconomic analysis of drought impacts

Objectives	**To develop robust, triangulated evidence about the costs of service attributes commonly used in valuation studies to represent resilience using an alternative to the stated preference approach**
Drivers	Resilience is a priority for Bristol Water and Ofwat, as decisions about acceptable levels of resilience can significantly affected expenditure and therefore pricing Regulatory: innovative methods and triangulation are encouraged by Ofwat
Service attributes	Resilience
Timescale	Mar-Aug 2017
# customers	285 NHH
Methodology	Quantitative macroeconomic analysis of costs of disruption caused by service attributes associated with resilience (e.g. economic impact of a business having no water for 1 day is £x) Qualitative interviews with representatives of key industries/businesses to test assumptions about economic impacts of impacts and refine model.
Interdependencies	B3. Developing a PR19 societal valuation study, All valuation research on relevant attributes for triangulation in B20
Outputs	Daily loss in gross value added (GVA) due to drought (millions) Level S2 drought 0.9m (1 month) 1.6m (3 months) 2.2m (6 months) Level S3 drought 1.5m (1 month) 2.5m (3 months) 3.3m (6 months) Level S4 drought 14.2m (1 month) 17.6m (3 months) 19.6m (6 months) Many respondents perceived that the drought and associated restrictions at any level of duration and severity would not affect their business. However, in terms of mitigation efforts, for a level 2 drought, most respondents would invest in water saving measures or maintenance. For a level 2 drought, these remain popular measures, but there is a marked increase in the number of respondents saying they would tell staff to work from home, which comes into line with using stored water and reducing certain core activities without decreasing output. The sectors that appear to be most severely affected by drought are human health and social work activities; accommodation and food service activities; food products, beverages and tobacco; and education.
Report	**B9. Macroeconomic analysis of drought impacts**

B9 Macroeconomic analysis of drought impacts		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence / leading utility company in UKCSI	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	Many respondents felt that drought and associated restrictions at any level of duration and severity would not affect their business. The sectors which appear to be most severly affected by drought are: human health and social work activities; accommodation and food service activities; food products, beverages and tobacco; and education. The impact of a drought on businesses was found to increase signficantly for higher levels of droughts and when droughts lasted for longer periods. In terms of mitigation, for a level 2 drought most respondents would invest in water saving measures or maintenance, but for level 4 they would be more likely to terll staff to work from home.

Quantitative and qualitative valuation data from 285 non-domestic customers

High contribution
Medium contribution
Low contribution

B10. Developer and SLP engagement review

Objectives	**To present a clear understanding of Developer and SLP priorities and perceptions** **To finalise an engagement strategy for Developers and SLPs that is integrated into overall engagement framework**
Drivers	Business: Bristol has strong relationships and good performance with these customers but currently are not using this to both business and customer advantage
Service attributes	N/A
Timescale	Jan – Mar 2017
# customers	N/A
Methodology	Brief evidence review of current research Interviews with Developer and SLP team Further development of engagement ideas proposed within this document
Interdependencies	A1. Customer dashboard, A8. Market engagement days
Outputs	This piece of work produced a working document, owned by the Bristol Water developer team to shape Market Engagement Days (see page 32).
Report	**B10. Developer and SLP engagement review**

B11. Deliberative resilience research

Objectives	**To explore *how* customers and stakeholders value resilience attributes when considered in the context of real life scenarios** **To develop evidence about the risk profiles of customers in relation to investment**
Drivers	Regulatory: this was an area identified at PR14 where evidence was not strong enough to justify the BW position, innovation in practice, triangulation
Service attributes	Resilience relating to drought avoidance and water resource options
Timescale	June 2017
# customers	111 HH
Methodology	3 day-long events with 37 customers per event. Simplified valuation survey applied pre- and post-event with participants responding individually on keypads. Discovery session to aid customer understanding of their water supply. Resilience scenarios to support discussion of the impact of potential events such as droughts and mains bursts on customers, businesses, and the environment. Top Trumps budgeting exercise to investigate customers' views on the trade-offs between short and long-term water resource options.
Interdependencies	B1. Customer segmentation and sampling frame to inform sampling, all valuation research on relevant attributes for triangulation in B20
Outputs	Quantitative findings: • Leakage (1% reduction) 6.86 (pre) 8.94 (post) • Water efficiency (improvement by one) 7.70 (pre) 7.46 (post) • Increased metering (1% increase) 0.25 (pre) 0.04 (post) • Protection of environment (improvement by one) 15.10 (pre) 14.87 (post) Qualitative findings: Customers were unwilling to pay more to reduce the impact of events such as droughts as many felt the current level of risk was acceptable. There was a clear preference for Bristol Water to focus on reducing demand (i.e. through leakage reduction, water efficiency measures etc) and getting the most out of the current system before committing to the development of new water sources. Leakage was a top priority throughout, as was water efficiency, although there was disagreement Bristol Water's role in educating customers. Metering was a divisive issue, with some fearing bills would be unfairly high for large families, and health needs.

	Most customers expressed support for the environment and wanted Bristol Water to mitigate negative activities, but were not always willing to pay more for this.
Report	**B11. Exploring resilience – deliberative workshops**

B11 Deliberative Resilience Research		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Participants were shocked by the amount of water lost through leakage and felt water shold not be wasted in this manner. Many groups chose to move resources from fixing leaks to maximising current water sources once they realised there was a limit to the cost effectiveness of investment in leakage reduction, but leakage remained a top priority.
	Metering and water efficiency promotion and support	Participants were divided on increasing the use of water meters. Those in favour highlighted the benefits of saving water, reducing bills and helping to identify leaks. Those against feared bills could be unfairly high. Many participants called for more investment in smart meters so they could monitor their water use more effectively. Participants agreed that education is important but were not always willing to pay more on their bills for thise as they did not feel it was Bristol Water's responsibility. Water efficiency devices were identified as a priority by some groups, but others felt a greater focus on education and water meters would encourage people to buy their own devices.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	Almost all groups expressed support for the environment but many had difficulty making the link between environmental action and benefits to them. They felt Bristol Water should take some responsibility to mitigate any negative impacts caused by their activities, but were not always willing to pay more.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	Most participants were unwilling to pay more to reduce the impact of disruptive events such as droughts and network failures, although some would pay more if the funds were ringfenced for this purpose. Participants could identify a wide range of impacts would could result from such events, but many had no personal experience of these issues and felt the current level of risk was acceptable. Maximising current water sources was seen as a logical first priority over developing new water sources or water trading.

Quantitative and qualitative valuation data from 111 participants

	High contribution
	Medium contribution
	Low contribution

B12. Innovative “Slider” stated preference game

Objectives	**To create a flexible tool that can be used on an ongoing basis to better understand customer’s risk preferences and how they value resilience attributes** **To generate quantitative data on customers’ preferences for resilience attributes**
Drivers	Regulatory: Ofwat is encouraging innovative and ongoing customer engagement. Resilience is also a key area of focus for both Ofwat and Bristol Water. This tool would also enable triangulation as outcomes from deliberative research on resilience and quantitative studies would feed into the design of the game. Business: A flexible tool can be updated and has a long life. It can be used on an ongoing basis, or for particular research campaigns.
Service attributes	• Unplanned interruptions (3-6 hours and 12-24 hours), • Hosepipe ban • Discoloured tap water • Traffic disruption • Leaky pipes • Water meters in more homes • Helping customers use less water • Protecting the environment
Timescales	June / July 2017
# customers	300 HH
Methodology	Online “slider” tool – presenting a more graphical, user-friendly method of stated preference research. The slider elicits data from respondents by asking them to select their desired service level for a set of service attributes using “sliders” on a computer or tablet screen. As customers select higher/lower service levels, the bill shown in the tool rises/falls to illustrate the trade-offs between service quality and price. The slider allows respondents to customise their bill to their liking.
Interdependencies	B3. Developing a PR19 societal valuation study, All valuation research on relevant attributes for triangulation in B20
Outputs	See table on next page for valuation results. Additional findings: Metered customers tend to want more metering in more homes; Older customers were less concerned with environmental quality; Respondents with higher social grade wanted to lessen the chance of a long interruptions in supply and wanted less leakage on a system level;

	The more adults in the household, the more customers wanted to shift traffic disruptions to nights and weekends. The more children in the household, the more customers wanted to lessen the chance of long interruptions and discoloured water, and reduce the overall leakage on the system.
Report	**B12. Analysis of innovative slider stated preference method**

B12 Innovative 'Slider' Stated Preference Game		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	The more adults in the household, the more customers wanted to shift traffic disruptions to nights and weekends.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Respondents with higher social grade or more children in the household wanted less leakage on a system wide level.
	Metering and water efficiency promotion and support	Metered customers tend to want more metering in more homes.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	The more adults in the household, the more customers wanted to shift traffic disruptions to nights and weekends.
	Building biodiversity and protecting our environment	Older customers were less concerned with environmental quality.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	The more children in the household, the more customers wanted to lessen the chance of discoloured water.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Respondents with higher social grade or more children in the household wanted to lessen the chance of a long interruption to supply.
	Resilience – boosting protection for population centres of more than 10,000	N/A

Quantitative valuation data from 400 participants

	High contribution
	Medium contribution
	Low contribution

WTP Estimates

Attribute	Simplified WTP	Probit WTP	Unit
No water for 3-6 hours with no warning	15.19	17.25	1% change in probability
No water for 12-24 hours with no warning	20.79	19.59	1% change in probability
Hosepipe ban	1.65	1.78	1% change in probability
Discoloured tap water	1.85	2.01	1% change in probability

Traffic disruption	1.55	1.58	Move from “current levels” to “lower”
Leaky pipes	11.67	12.14	Per 10Ml/day reduction
Water meters in more homes	3.04	3.34	Per +100K customers metered
Helping customers use less water	1.89	1.97	Move from “current levels” to “lower”
Protecting the environment	2.64	2.54	Move from “current levels” to “lower”

B13. Customers in vulnerable circumstances

Objectives	**To provide qualitative insight into vulnerable customer perceptions of key topics in the draft PR19 Business Plan** **Understand overall service experiences and expectations** **Explore how current services and service experiences meet vulnerable customers' needs**
Drivers	Regulatory: affordability and vulnerability is a key focus for Ofwat Business case: this is an area under active consideration
Service attributes	Affordability
Timescale	Aug – Sept 2017
# customers	10 stakeholders, 18 HH
Methodology	Three stage iterative approach 1) Scoping: Literature review and staff interviews 2) Stakeholders: 10 face to face/ telephone stakeholder interviews 3) Direct Engagement: 18 in-home and in-venue paired interviews
Interdependencies	A14. Debt advice workshops, B21. Social Tariff Eligibility Modelling
Outputs	**Both stakeholders and staff are positive about current support and level of service** • Bristol Water is more positively perceived for its support for people in vulnerable circumstances than other public sector organisations or utilities • Customers in circumstances which mean they may be vulnerable also agree **However, this is not permission to rest on laurels** • Strong indications that financial and other risk factors will increase the numbers experiencing vulnerability • Service and support expectations are increasing • Profiling analysis suggests there is a large gap between those eligible/who would benefit from support and those getting it • Actual experience of service failure revealed support mechanisms were lacking **Challenges in providing support to those with additional needs:** • Some people are easier to help than others (Active Managers will engage with information and signposting whereas Debt Copers need tools and strategies to help them (but may not engage with the information/signposting) and the Debt Deniers are so disengaged they need particular strategies

	• Expectations of support and fair treatment very low: informal networks are trusted. Implications for partnership working within local communities
Report	**B13. Customers in vulnerable circumstances**

B14. Focus Group on performance commitments

Objectives	**To understand customer views on performance commitments** **To understand customer views on how outcome delivery incentives should be applied to these performance commitments**
Drivers	Regulatory – to demonstrate customer input into determining performance commitments Business case: making the business more responsive to customer needs and priorities
Service attributes	All 24 performance commitments were discussed
Timescale	September 2017
# customers	29 HH
Methodology	3 half day sessions with household customers which included: Introduction to the idea of measuring performance, Bristol Water's performance commitments, and Bristol Water's performance in relation to other water companies. A ranking exercise and discussion on Bristol Water's performance commitments, and customer views on the best options for measurement. Discussion on preferences for financial / reputational incentives for the PCs, and the detail of the financial incentives (i.e. in period and out of period.
Interdependencies	A1. Customer dashboard, B1. Customer segmentation and sampling frame
Outputs	Customer prioritised performance commitments relating to affordability and vulnerable customers and the environment, and had clear views on how these should be measured (% in water poverty and perception of value for money, and biodiversity index and energy efficiency). They also prioritised leakage and per capita consumption. Customers preferred financial incentives over reputational, with the exception of biodiversity, drought risk, raw water quality, and water quality. Most customers expressed a preference for a penalty and reward system because of its mutual benefit to customers and Bristol Water. They believe that making the company more attractive to investors is important in order to improve infrastructure, while ensuring that if customers receive a bad service, they will at least receive a discounted bill. However, they recommend the following for penalty-only: customer service, DMex, water quality, value for money. Customers preferred in-period adjustments for Bristol Water's statutory duties (i.e. water quality compliance) and customer service and end-of-period for performance commitments associated with longer timescales, such as environmental concerns.
Report	**B14. Performance commitments focus groups**

B14 Focus Group on Performance Commitments		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Participants think that measuring the percentage in water poverty and perception of value for money are the best ways of assessing affordability.
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	Most participants value the commitment to tackling water poverty because they feel that access to clear drinking water is a human right, that it is important to help families and that they still receive some money if they help a customer pay, although some say it this is not necessary as water cannot be cut off.
Saving water before developing new supplies	15% leakage reduction	Participants prioritise the commitment to leakage because they feel wastage affects value for money, water is a finite resource and leaked treated water could damage habitats.
	Metering and water efficiency promotion and support	Participants prioritise per capita consumption they feel it is important to encourage customers to use less water and inform them that water is a finite resource. Some participants feel that water meters can be cheaper for some people and encourage reduced water use, but feel that they are not a priority and that vulnerable customers would need to be protected.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	Participants think that biodiversity index and energy efficiency are the best measures for Bristol Water's environmental impact. Biodiversity index was prioritised by participants because they say that wildlife needs to be protected and reservoirs are important habitats.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Raw water quality, water quality compliance, discolouration and turbidity were all prioritised by participants as they feel this would help to reassure customers there was no health risk. Most also prioritise taste, although some say taste and hardness vary by area and are subjective.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Unplanned outages and supply interruptions are not prioritised by participants as they feel these are manageable for most customers.
	Resilience – boosting protection for population centres of more than 10,000	Participants prioritise security of supply for measuring resilience. They do not feel that drought risk is a priority as drought is not likely and there is little that can be done to prevent it.

Focus groups with 29 customers

(dark blue)	High contribution
(medium blue)	Medium contribution
(light blue)	Low contribution

B15. Revealed preference research: Focus groups and survey

Objectives	**To understand and place a value on choices customers make when their water supply is interrupted** **To understand and place a value on choices customers make if they are unhappy with the taste / appearance / hardness of their water**
Drivers	Regulatory – Ofwat is keen for companies to conduct revealed preference research
Service attributes	Supply interruptions, taste and appearance, hardness
Timescales	July – September 2017
# customers	528 HH 262 NHH
Methodology	4 focus groups in areas that had recently experienced supply disruption 12 face-to-face interviews 750 phone interviews
Interdependencies	B3. Developing a PR19 societal valuation study, All valuation research on relevant attributes for triangulation in B20 Can be compared with customer data on priorities for service attributes
Outputs	The severity of the impact caused by a water supply interruption on households and businesses depends on the length of duration, what day of the week it takes place and at what time it starts and finishes. Customers were frustrated at not knowing how long the situation would last as it made planning difficult. For households, alternative arrangements focused on kitchen and bathroom activities and involved going to friends or neighbours, buying bottled water, and choosing to stay / eat out. NHH customers involved in catering were most impacted and had to use high volumes of bottled water, hygiene products, and petrol. Some had to close for the day. The vast majority of household and non-household customers were also able to reveal the implications of the actions they undertook to mitigate the supply that ended up costing them money. NHH customers were more likely to contact BW than HH customers who tended to get their information from neighbours. Most were happy with BW's handling of the incident. Average cost of supply disruption for household customers:

	Unweighted = £12.26, Weighted = £12.31 *Note – there were regional differences in costs, please see report for details.* Average cost of supply disruption for non-household customers: Base = £9.57, Unweighted = £10.77, Weighted = £5.74
Report	**B15a. Revealed preference qualitative research** **B15b. Revealed preference valuation**

B15 Revealed Preference Research: Focus Groups and Survey		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	The severity of the impact cause by a water supply interruption depends on the duration, day of the week, time it starts and finishes, and the size of the business or number of people in the household. Overall, respondents who experienced supply interruptions in Shirehampton or Whitchurch were happy with how Bristol Water handled the situation. Customers in these locations and in Willsbridge were calculated to have spent an average of £12.31 for domestic customers and £9.57 for non-domestic customers due to the supply interruptions.
	Resilience – boosting protection for population centres of more than 10,000	N/A

Qualitative and quantitative data from a total of 528 domestic customers and

	High contribution
	Medium contribution
	Low contribution

B16. UWE Water demand study

Objectives	**The findings of the ongoing UWE study investigating water demand in student accommodation.**
Drivers	Regulatory: drive for innovation in research Business case: metering is a priority for the business, water usage has long term implications for water resource planning
Service attributes	Metering
Timescale	Research ongoing – review produced for 2016-2017 programme
# customers	N/A
Methodology	Research owned by UWE and delivered according to their methodology
Outputs	Generally, 2014-2015 results have marked a leap forward toward a better understanding of water consumption dynamics within the Student Village. The following key findings were identified: • Demographics seem to play a big role in water consumption. • Maintenance is still a big factor (i.e. flushing the system) • Intra-Court variability is so high that a Block-level control (reference) group is required • Analysis of “soft measures” and “student behaviour” is likely to become an important requirement for the project in future.
Report	**B16. Social cultural drivers of water demand (UWE)**

B16 UWE Water Demand Study		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence / leading utility company in UKCSI	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	The study showed that behavioural adaptation to 'hard' interventions (new fixtures, such as low flow showerheads) can easily offset any initial water savings. It also showed that demographics can play a big role in water consumption.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

	High contribution
	Medium contribution
	Low contribution

B17. Co-Creation workshops with stakeholders

Objectives	**To engage key stakeholders in the contents of Bristol Waters plans as they develop (WRMP, SDS, and BP)**
Drivers	To support positive relationships with stakeholders
Service attributes	N/A
Timescale	Ongoing
# customers	Water in the Future Nov 2017: 30 Environmental resilience Nov 2017: 18 Resource Efficient West of England Nov 2017:25
Methodology	One to one interactions with stakeholders, group presentations and discussions on key themes.
Outputs	**Water in the Future:** Outputs collated with responses from customers, developers, and reviewed by Bristol Water exec as part of development of Bristol Water's long-term strategy. Key themes from stakeholders were around giving local people responsibility and ownership for the services they use. **Environmental resilience:** Outputs included suggestions for co-creating environmental projects which included initiatives that support biodiversity conservation, water quality pollution reduction and recreational access and facilities. **Resource efficient West of England**: The workshop revealed many opportunities and a strong commitment to work together to encourage resource efficient behaviours. Participants agreed to pursue collaborative action in 6 areas.
Report	**B17a. Water in the Future** **B17b. Environmental resilience co-creation** **B17c. Creating a resource efficient West of England**

B17 Co-creation Workshops with Stakeholders		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	Stakeholders say that Bristol Water should use data sharing to work with partners to empower future customers to avoid water poverty.
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	Stakeholders believe that Bristol Water should aim to reflect and act on the true environmental cost of water, in partnership with customers, and communicate our ambitions for the environment as a positive selling point of our business.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

	High contribution
	Medium contribution
	Low contribution

B18. Drought Plan consultation

Objectives	**To engage customers & key stakeholders in the contents of Bristol Waters plans as they develop (WRMP, SDS, and BP)**
Drivers	Regulatory: statutory duty to provide customers and stakeholders the opportunity to comment on the proposals set out in the draft Plan
Service attributes	Drought
Timescale	8 week period 27th March – 21st May 2017
# customers	29
Methodology	A separate online survey to link in with the online panel in (March 2017) was available for customers on the website. To make it simpler to comment and to encourage a higher response rate, a short questionnaire was created which included specific questions on key elements of the plan.
Interdependencies	A4d. Online customer panel (Use of Bristol Water's lakes and opinions on drought and related messaging).
Outputs	64 customers started the survey and 29 completed it. Most customers said they understood the Drought Plan's content (88%) and felt it considered all the challenges (70%), considered all measures to take (72%), struck the right balance between risk and uncertainty (84%), struck the right balance between customer measures and actions which might affect the environment (87%). Most also said that phasing restrictions were appropriate (80%), emergency measures were acceptable (93%) and understood the 'Temporary Use Ban' process. 48% said it was right to delay implementing restrictions to certain customers until there were severe drought restrictions, while 38% said it was not. 75% said they had no concerns about the implementation of restrictions. We have made changes to our drought plan that are supported by the comments and feedback received from customers. For example, we have changed the process by which temporary use bans (TUBS) and non-essential use bans (NEUB) will be implemented, from a phased approach to an approach when TUBS are all implemented at the same time (in zone 4) and similarly NEUBs are all implemented at the same time (in zone 5). In addition customers also showed support for ongoing water efficiency campaigns and this will be taken forward in developing our future water efficiency policy/process.
Report	**B18. Drought plan consultation**

B18 Drought Plan Consultation		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	83% of respondents do not have any specific concerns about the drought management option proposed. 84% of respondents feel that the draft plan strikes the right balance between risk and uncertainty, and 87% feel it strikes the right balance between customer measures and measures which might affect the enironment. 75% do not have any concerns about the implementation of restrictions or feel they would be unfair. Respondents are divided over whether it is right to delay implementing restrictions for some customers until there are severe drought conditions, with 48% believing it is fair and 38% that it is unfair.

	High contribution
	Medium contribution
	Low contribution

B19. Company financing and bill impacts deliberative event

Objectives	**To understand customer preferences in paying up front, versus spreading costs and incurring impact, and how that relates to bill levels**
Drivers	Regulatory: Required by Ofwat to have engaged on this topic Business: Needed to inform business plan decisions
Service attributes	N/A
Timescale	December 2017
# customers	38
Methodology	Full day deliberative event, working with 4 groups of customers (8 or 9 per table). Range of activities: • Asking customers their views on financing for an individual asset, and for a community asset. • Informing customers about the make-up of the average Bristol Water bill and hearing their views on the level of finance in the bill. • Working with customers to understand the decisions that play into determining these levels through playing a Water Supply game, mimicking Bristol Water bills levels and showing customers how bill levels, bill profile and finance can change depending on decisions made around asset maintenance and investment for the future. Using group discussion, key pad voting, game playing to learn customer views.
Outputs	27. Company finance and bill impact deliberative event
Interdependencies	Business plan options research
Report	**B19. Company financing and bill impacts deliberative events report**

B19 Company Financing and Bill Impacts Deliberative Event		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Participants priority was a low bill and a stable bill. 67% of participants thought Bristol Water's current proportion of finance was 'about right'. 24% considered it to be 'too high'. Participants were interested in using models that would allow people in different circumstances to pay different amounts. They were generally debt averse and preferred to pay up-front.
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

Quantitative and Qualitative data from 38 participants

	High contribution
	Medium contribution
	Low contribution

B20. Triangulation by attribute

Objectives

To explain the methodology behind reviewing the valuation data available and producing recommended values for service attributes.

Drivers

Regulatory: Ofwat recommends triangulation of a range of valuation data

Business: To sense check different research activities against each other and provide well-evidence valuation data for business plan modelling.

Service attributes

All

Timescale

December 2017

 # customers

N/A

Methodology

The basic principle is to use several different methods to estimate the same value, and critically assess the results to get a more robust picture. There are five steps in the triangulation process: assessment of the strengths and weaknesses of each study in turn; assessment of the context in which each attribute will be used; assessment of the individual results generated by each study on a given attribute; review of relevant qualitative research or ongoing customer data; and recommendation of values to use in Cost Benefit Analysis (CBA).

Interdependencies

All research

Outputs

A range of values is recommended for each attribute along with a level of confidence based on how robust the evidence is in each case. The values below are for household customers only. Please refer to the report for further information.

Rota cuts:

Attribute	Unit	Central	Low	High
Level 4 Restrictions	Avoiding one expected day of interruption in one property	£47.10	£9.90	£84.40

Planned short-term interruptions:

Attribute	Unit	Central	Low	High
Planned Interruption (3-6h)	Avoiding one affected property	£91.0	£19.4	£434.1
Planned Interruption (6-12h)	Avoiding one affected property	£121.0		
Planned Interruption (12-24h)	Avoiding one affected property	£175.0		

Unexpected short-term interruptions:

Attribute	Unit	Central	Low
Unexpected Interruption (3-6h)	Avoiding one affected property	£177.3	£12.3
Unexpected Interruption (6-12h)	Avoiding one affected property	£287.0	£12.3
Unexpected Interruption (12-24h)	Avoiding one affected property	£293.0	£12.3

Unexpected long-term interruptions:

Attribute	Unit	Central	Low	High
Unexpected Interruption (few days)	Avoiding one affected property	£426.6		

Hosepipe ban:

Attribute	Unit	Central	Low	High
Hosepipe Ban	Reducing probability that one property is affected by 1 percentage point	£0.4	£0.1	£1.8

Leakage reduction:

Attribute	Unit	Central	Low	High
Leakage Reduction	Avoid 1Ml/day in the whole supply area	£0.7		£2.3

Meter penetration:

Attribute	Unit	Central	Low	High
Metering Penetration	10 percentage points increase in metering	£0.6	£0.4	£1.8

Water efficiency measures:

Attribute	Unit	Central	Low
Water Efficiency Measures	Improving water efficiency (education and devices)	£8.4	£2.0

Environmental improvement:

No valuation recommended.

Water discolouration:

Attribute	Unit	Central	Low	High
Water Discolouration	Reduce the probability of a "Few hour" incident at one property by 1 percentage point	£2.1		

Taste and odour:

Attribute	Unit	Central	Low	High
Taste and Odour	Reduce the probability of a "Few hour" incident at one property by 1 percentage point	£3.3	£1.5	£5.2

Occasional low water pressure:

Attribute	Unit	Central	Low	High
Occasional Low Water Pressure	Reduce the probability of an incident at one property by 1 percentage point	£2.0	£0.8	£3.1

Value of avoiding traffic disruption:

Attribute	Unit	Central	Low	High
Traffic Disruption	Avoid 1 hr disruption	£18.7		£67.0

Report B20. Triangulation by attribute

B20 Triangulation of Attributes		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	Triangulation produced a central weighted average WTP for domestic customers of £18.70 to avoid 1hr of traffic disruption.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Triangulation produced a central weighted average WTP of £0.60 to avoid 1Ml/day of leakage in the whole supply area.
	Metering and water efficiency promotion and support	Triangulation produced a central weighted average WTP of £0.50 for a 10% increase in metering and of £8.40 to improve water efficiency through education and water saving devices.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Triangulation produced a central weighted average WTP for domestic customers of £18.70 to avoid 1hr of traffic disruption.
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Triangulation produced a central weighted average WTP of £2.20 to reduce the probability of a 'few hour' water discolouration incident at one property by 1% and of £3.60 to reduce the probability of a 'few hour' taste/odour incident at one property by 1%.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Triangulation produced a central weighted average WTP of £127.70 to avoid one property being affected by a planned interruption of 3-6 hours and of £245.20 for an unplanned interruption. For long term unplanned interruptions of a few days this rises to £534.20 and for a few weeks to £1339.60. There is also a central weighted average WTP of £2.00 to reduce the probability of a low water pressure incident at one property by 1%.
	Resilience – boosting protection for population centres of more than 10,000	Triangulation produced a central weighted average WTP of £62.20 to avoid one expected day of interruption in one property from level 4 drought restrictions and of £0.50 to reduce the probability of one property being affected by a hosepipe ban by 1%.

Critical assessment of valuation data

	High contribution
	Medium contribution
	Low contribution

B21. Social tariff eligibility modelling

Objectives	**To understand what proportion of customers are eligible for social tariffs relative to Bristol Water's customer base** **To understand the proportion of customers currently on social tariffs relative to those who are eligible for social tariffs** **To understand which geographic areas are under or over represented for help with affordability** **To identify those customers who are eligible for social tariffs but are not on a social tariff**
Drivers	Regulatory: avoiding one-size-fits-all approach to customers Customers: ensuring all customers are able to afford their water bill
Service attributes	Affordability
Timescale	Dec – Jan 2018
# customers	All
Methodology	Use high level rules to determine which customers are eligible for social tariffs. Rules are based on information BW holds but will need to be augmented by additional data from CACI (Ocean dataset). Initial required data includes: income support, pension credit, debt issues, income-related allowance, presence to children under 19 etc.
Interdependencies	B1. Customer segmentation, B13. Customers in vulnerable circumstances
Outputs	1) A data report of customer names / contacts of those customers who are eligible for social tariffs but not currently on a social tariff. 2) A report which will include visual maps on the proportion of Bristol Water customers eligible for each social tariff compared to customers who are actually on those tariffs. We would like it to be measured on the lowest possible geographical level to provide good granularity between different areas. We would also like an option to update the model when necessary in the future. *See table on next page for results*
Report	**B21. Social tariff eligibility modelling**

Summary of results	Rules	Customers on the tariff	Customers eligible	Additional eligible	Current coverage
Assist	• Debt problems • Customer spends more than 2% of discretionary income on water	5,585	9,195	3,610	60.73%
Pension Credit	• Retired • Discretionary income less than £15k • No children	3,660	26,268	22,608	13.93%
Restart	• Debt problems • Standard tariff between 1.5% - 2% of discretionary income	4,354	7,300	2,946	59.64%
WaterSure Plus - Family	• In receipt of child benefit • 3+ children •	1,612	5,721	4,109	26.17%
WaterSure Plus - Medial	• Receipt of disability benefit • High water needs	984	1,527	543	64.44%
Total		**16,195**	**50,011**	**33,816**	**32.38%**

B21 Social Tariff Eligibility Mapping		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	N/A
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	In total, 32.38% of those who are eligible are on a social tariff.
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

	High contribution
	Medium contribution
	Low contribution

B22. Water Resource Management Plan Consultation

Objectives	**To engage customers & key stakeholders in the contents of Bristol Waters plans as they develop (WRMP, SDS, and BP)**
Drivers	Regulatory: statutory duty to provide customers and stakeholders the opportunity to comment on the proposals set out in the draft Plan
Service attributes	N/A
Timescale	Jan - Mar 2018
# customers	265
Methodology	A separate online survey to link to be added to the online panel and to be available for customers on the website. To make it simpler to comment and to encourage a higher response rate, a short questionnaire will be created which will include specific questions on key elements of the plan.
Interdependencies	B11. Exploring resilience – deliberative workshops, B23. WRMP demand reduction deliberative events, B7. Water resource research (willingness to pay part 2), B20. Triangulation by attribute
Outputs	N = 265. 92% said they understood the plan and 65% said that nothing was missing, whilst 73% said the plan struck the right balance of short and long term risk. 58% had no concerns that that plan might lead to unaffordable water, although 24% had concerns. Overall, 85% agreed with the approach laid out in the plan and only 5% did not agree. The main theme emerging from the verbatim comments was a continued focus on waste reduction. Answers varied dramatically and will require further attention.
Report	**B22. dWRMP Consultation 2018**

B22 Water Resource Management Plan Consultation		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	58% had no concerns that that plan might lead to unaffordable water, although 24% had concerns.
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	92% said they understood the plan and 65% said that nothing was missing, whilst 73% said the plan struck the right balance of short and long term risk. Overall, 85% agreed with the approach laid out in the plan and only 5% did not agree. The main theme emerging from the verbatim comments was a continued focus on waste reduction. Answers varied dramatically and will require further attention.
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

	High contribution
	Medium contribution
	Low contribution

B23. WRMP demand reduction deliberative events

Objectives	**To further explore customer views on demand reduction, in particular in relation to leakage, metering, and water efficiency**
Drivers	Regulatory: Behaviour change around water efficiency is a key priority Business: Based on previous research events, this is an area that warrants further exploration, and is an area customers are particularly interested in.
Service attributes	Leakage, metering, water efficiency
Timescale	February 2018
# customers	112
Methodology	Three one-day deliberative events to explore customer views on proposed demand reduction options, understand customer views on Bristol Water's proposals within the Water Resource Management Plan (WRMP) 19 and generate ideas about how to promote water efficiency measures.
Interdependencies	B11. Exploring resilience – deliberative workshops, B22. WRMP consultation, B24. Business plan options deliberative event
Outputs	Customers generally supported the WRMP19 proposals but were concerned about increasing bills. They valued a balanced approach to risk and expressed confidence that Bristol Water would ensure an adequate supply in the future. Customers feel that Bristol Water should be responsible for the costs and measured required to tackle to forecast supply-demand deficit but recognise that changing customer behaviour would be beneficial and think awareness programmes should focus on water efficiency devices, the benefits of metering, details of Bristol Water's network and the forecast deficit. Customers prefer demand management to increasing supply, but believe in the long term the supply must be increased to keep up with population growth. They view leakage, water efficiency and environmental protection as high priority, support metering and would pay to avoid a supply-demand deficit.
Report	**B23. Demand reduction WRMP deliberative events**

B23 WRMP Demand Reduction deliberative events		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Keeping bills low was a key consideration for customers when evaluating demand reduction measures
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Fixing leaks was customers 2nd priority for demand management options, even though they were aware of BW's strong leakage performance in relation to other companies.
	Metering and water efficiency promotion and support	Metering was customers 3rd priority for demand management options, and water efficiency the 6th. However education about water demand was consistently prioritised above all others by customers.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Some customers were interested in community inititiatives and how communities could work together to save water. In addition, education was a consistent priority as a demand reduction option.
	Building biodiversity and protecting our environment	Customers supported demand reduction options that helped to protect the environment, but improving environmental resilience in itself was not a priority.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Customers supported pressure management as a way of proactively preventing leaks and bursts
	Resilience – boosting protection for population centres of more than 10,000	N/A

Qualitative data from 112 participants

(dark blue)	High contribution
(medium blue)	Medium contribution
(light blue)	Low contribution

B24. Business plan options deliberative event

Objectives	**To involve customers in the development of Bristol Water's business plan** **To understand customer preferences around different potential service packages**
Drivers	Regulatory: Ofwat are encouraging companies to involve customers in decision making process Business: To support business plan decision making
Service attributes	Customer experience, local resilience, reliability, bill levels
Timescale	February 2018
# customers	38
Methodology	A full-day deliberative event helping customers to understand the various options and the impact it would have on their bill and water service, and to learn their views.
Interdependencies	B25. Business plan options focus groups with seldom-heard customers, A12. Youth Board, A4f. Online customer panel (business plan options), B20. Triangulation by attribute,
Outputs	Customers commented on the extent of leakage, water quality and customer service. They welcomed the inclusion of biodiversity and spoke about the importance of public education on water consumption and of transparency in water usage and billing. They referred to the need to plan for population increase and expressed mixed opinions on metering.
Report	**B24. Business plan options events** **(combined with 25. Business plan options focus groups)**

B24 Business Plan Options: Deliberative Event		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	As bills increase, customer appetite for investment in services decreases. Customers who preferred higher levels of investments were mostly from socioeconomic group B and were slightly older. Those in social rented accommodation or private rented accommodation were less likely to select high levels of investment.
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	N/A
	Metering and water efficiency promotion and support	Participants spoke about the importance of public education on water consumption. Opinions on water meters were mixed.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	Customers welcomed the inclusion of biodiversity in the plan.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

Deliberative event with 38 customers

	High contribution
	Medium contribution
	Low contribution

B25. Business plan options focus groups with seldom-heard customers

Objectives	**To learn customer views about the options being considered for the business plan** **To ensure groups who don't frequently engage with customer research have an opportunity to share their views**
Drivers	Regulatory: To demonstrate customer involvement in the business planning process Business: To ensure a range of different customer voices are heard
Service attributes	All
Timescale	February 2018
# customers	24
Methodology	Three focus groups, each with 8-10 people. These groups were focused on specific demographics: Customers living in a rural area Customers from lower socio-economic groups Customers with English as a second language
Interdependencies	B24. Business plan options deliberative event. A12. Youth Board, A4f. Online customer panel (business plan options), B20. Triangulation by attribute
Outputs	Across the different groups, participants prioritised reliability strongly. While a few prioritised customer experience, resilience was not widely chosen. However, this view did shift slightly in later activities. They often linked the information they were given about service areas to their own experience of repairs or supply interruptions. Some were surprised by the leakage figure and expressed mixed opinions on the maintenance cost. A common theme was that while customers saw resilience as important, and some has experienced disruption, they were happy with the current level of service / risk and so did not see the need for additional investment.
Report	**B24. Business plan options events (combined with business plan options deliberative event)**

B25 Business Plan Options: Focus Groups with Seldom-heard Customers		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	As bills increase, customer appetite for investment in services decreases.
You get the best possible experience every time you need us	Achieving customer excellence	Participants prioritised customer experience across all groups.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Some participants were surprised by the leakage figure and expressed mixed opinions on the maintenance cost.
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer	Participants prioritised reliability strongly across all groups.
	Resilience – boosting protection for population centres of more than 10,000	Resilience was not widely prioritised. They saw resilience as important but were happy with the current level of service or did not see the need for additional investment.

Focus groups with 25 customers in total

	High contribution
	Medium contribution
	Low contribution

B26. Customer Summit

Objectives	To obtain feedback from engaged customers on the draft business plan
Drivers	Business: To support business plan decision making
Service attributes	Options informing draft business plan.
Timescale	May 2018
# customers	96
Methodology	A full day deliberative event presenting Bristol Water's draft business plan to customers and seeking feedback, with customers who have previously attended engagement events.
Interdependencies	B28. Draft business plan consultation – representative survey, B29. Draft business plan consultation – focus groups with seldom heard customers, B30. Draft business plan consultation – overall consultation, A4g. online panel (Draft business plan)
Outputs	Customers' views were sought on their priorities and their preferred improvement plan. Customers were pleased with the plan overall but felt environment and education were underrepresented in the plan. Customers' personal experience influenced their investment decisions and they tended to deprioritise services which they felt were already good (water quality) or did not directly benefit them (customer experience).
Report	**B26. Customer summit**

B26 Customer Summit		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Customers' personal experience was found to significantly influence their investment decisions.
You get the best possible experience every time you need us	Achieving customer excellence	Customer experience was deprioritised because participants felt it did not deliver direct benefits to them. They also felt that this was Bristol Water's responsibility and costs should not be passed on.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	Participants were unsure about the performance metric for vulnerable customers and felt more could be done to make customers aware support would be available.
Saving water before developing new supplies	15% leakage reduction	Fixing leaks was a high priority for participants, but most opted for the suggested plan as they felt it represented better value for money.
	Metering and water efficiency promotion and support	Education was felt to be underrepresented in the draft business plan. Some participants felt that water conservation measures targeted customers and did not include how Bristol Water could contribute to efficiency. Most participants expressed strong support for metering, but some felt it would not fit with their personal circumstances.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	The suggested plan was most popular for community, but some participants felt this was a deviation from Bristol Water's core responsibilities.
	Building biodiversity and protecting our environment	Environment was felt to be underrepresented in the draft business plan. Participants were split between those who wanted to keep bills low and those who had strong environmental commitments.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Water quality was deprioritised because participants perceived it as good already.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Most participants preferred the slower plan because they thought the problem did not occur often enough to warrant investment.
	Resilience – boosting protection for population centres of more than 10,000	Most participants preferred the faster plan because they felt it offered higher impact per pound spent.

Qualitative data from 96 participants

	High contribution
	Medium contribution
	Low contribution

B27. Sensitivity testing

Objectives	**To understand customer preferences around service improvements with different bill profile**
Drivers	Regulatory: Involving customers throughout the business planning process, and understanding their willingness to pay in different scenarios Business: To support the development of the business plan
Service attributes	N/A
Timescale	March – May 2018
# customers	612
Methodology	We tested customer acceptability of three possible business plans using three different exercises: a single plan choice exercise, a multiple plan choice exercise, a multiple plan choice with comparative information exercise.
Interdependencies	B20. Triangulation by attribute
Outputs	A higher proportion of customers accept the business plan with lower bill impacts and lower levels of service, which probably reflects customers' income elasticity of demand. That is, better off customers tend to accept plans with better service and higher bills, but less well-off customers may only accept lower cost plans. In addition, customers; propensity to accept the business plan reduces slightly as the starting "baseline" level of the bill increases. Customers categorised in the "safely affluent" and "comfortable family" groups have the highest propensity to accept Bristol Water's business plans, accepting the highest cost plan over 80% of the time. The other groups ("social renter", "mature and measured", thirsty empty nester" and "young urban renter") all had a lower propensity to accept changes BW's business plan proposals, especially those with higher bills and service levels.
Report	**B27. Sensitivity testing**

B27 - Sensitivity Testing- Quantitative valuation data from 612 customers		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Customers accept the business plan with lower bill impacts and lower levels of service, which probably reflects customers' income elasticity of demand. That is, better off customers tend to accept plans with better service and higher bills, but less well off customers may only accept lower costs plans. Some customers may have a budget constraint limiting their willingness to select a plan with a larger service improvement and higher bill. 'Safely affluent' and 'comfortable families' have the highest propensity to accept the business plans, accepting the highest cost plan 80% of the time.
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Respondents indicated an 'expected' WTP of £2.57 to avoid 1Ml/day of leakage in the whole supply area.
	Metering and water efficiency promotion and support	Respondents indicated an 'expected' WTP of £0.72 for a 10% increase in metering. They also indicated an 'expected' WTP of £6.62 to improve water efficiency using education and water saving devices.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	N/A
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Respondents indicated an 'expected' WTP of £2.30 and £3.36 in order to reduce the probability a 'few hour' incident at one property by 1% for discolouration and taste/smell respectively.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	Respondents indicated an 'expected' WTP of £184.49 in order to avoid an unexpected interruption of 3-6 hours for one property.
	Resilience – boosting protection for population centres of more than 10,000	Respondents indicated an 'expected' WTP of £56.60 to avoid one expected day of interruption in one property from level 4 drought restrictions. They also indicated an 'expected' WTP of £1.84 to reduce the probability of a low pressure incident at one property by 1%.

High contribution
Medium contribution
Low contribution

B28. Draft business plan consultation- representative survey

Objectives	**To understand the acceptability of the draft Business Plan to a representative range of Bristol Water customers**
Drivers	Regulatory: demonstrating acceptability of Business Plan to customers
Service attributes	N/A
Timescale	Apr - Jun 2018
# customers	1140
Methodology	A mix of open and closed survey questions designed to elicit feedback on key elements of the Business Plan Online with telephone interviews to top up sample where required – fresh sample of Bristol Water customers recruited specifically for this exercise
Interdependencies	B26. Customer summit, B29. Draft business plan consultation – focus groups with seldom heard customers, B30. Draft business plan consultation – overall consultation, A4g. online panel (Draft business plan)
Outputs	Two key concerns for customers across all questions are lower bills and good value for money. The faster option was the least preferred option across all questions. Customers' overall preferences did not necessarily match their preferences in relation to individual issues. Across all the outcome packages, more customers chose the slower plan and fewer chose the faster plan than when just looking at the individual services. Customer choices are heavily influence by the impact on their bill, with the higher bill impacts seeing less support from customers. The majority of customers strongly agreed with the each of the priorities we presented for 2020-2025.
Report	**B28. Draft business plan consultation representative survey**

B28 Draft Business Plan Consultation: Representative Survey		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	Lower bills and good value for money were key concerns for customers across all questions. Customer choices were heavily influenced by the impact on their bill, with higher bill impacts receiving less support from customers.
You get the best possible experience every time you need us	Achieving customer excellence	For customer experience, the majority of respondents chose the suggested plan, suggesting that it would be the best compromise between making improvements and saving costs. The faster plan was popular with comfortable families, who were four times more likely to raise the importance of good customer service than social renters.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	For vulnerability assistance, more respondents chose the suggested plan than the slower or faster plans. Most customers agree or strongly agree with supporting people who can't afford their bill with a social tariff, but support for the tariff declines as the increase to customers' bills rises.
Saving water before developing new supplies	15% leakage reduction	For leakage, more respondents chose the slower plan than the suggested or faster. Social renters were particularly likely to prefer the slower plan. Most customers who chose the slower plan said they would like to minimise their bills.
	Metering and water efficiency promotion and support	For water use, more respondents chose the slower plan than the suggested or faster. Most customers who chose the slower plan said they would like to minimise their bills.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	For community, more respondents chose the slower plan than the suggested or faster. Most customers who chose the slower plan said they would like to minimise their bills.
	Building biodiversity and protecting our environment	The biodiversity plan is the only plan within the Local Community and Environmental Resilience outcome where customers did not prefer the slower option, with more selecting the suggested plan. Customers who chose the suggested plan often felt this would be the best value for money or the best compromise between making improvements and saving costs, while those who chose the slower plan wanted to minimise their bills.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Taste and smell of water was the only performance commitment across any of the outcomes where respondents preferred the faster plan. For the appearance of water, respondents preferred the suggested plan, whilst for water quality and compliance risk more respondents chose the slower plan.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	For supply interruption, the majority of respondents chose the slower plan. Most customers who chose the slower plan said they would like low bills.
	Resilience – boosting protection for population centres of more than 10,000	For major supply events, more respondents chose the slower plan than suggested or faster. Most customers who chose the slower plan said they would like low bills.

Quantitative and qualititative data from 1140 customers

	High contribution
	Medium contribution
	Low contribution

B29. Draft business plan consultation – focus group with seldom heard customers

Objectives	To ensure that Bristol Water can provide evidence of acceptability from all customer groups, including those who are hardest to hear
Drivers	Regulatory: not taking a one-size-fits-all approach Social responsibility: ensuring that the hardest to hear are not excluded from taking part
Service attributes	N/A
Timescale	Apr - Jun 2018
# customers	31
Methodology	Review of customer segmentation to confirm sampling for focus groups A series of focus groups (10 people per group) with particular groups: Customers living in a rural area Customers who speak English as a second language Customers from lower socio economic groups Short focus group sessions with questions targeted on key aspects of the business plan, include some quantitative measures to provide comparable data Thematic analysis for robust findings
Interdependencies	B26. Customer summit, B28. Draft business plan consultation – representative survey, B30. Draft business plan consultation – overall consultation, A4g. online panel (Draft business plan)
Outputs	The suggested plan was the most popular overall. However, results for individual service areas were mixed, with the slower plan being the most popular for the 'local community and environmental resilience' area and the faster plan being the most popular for the 'safe and reliable supply' service area. Customers' overall preferences do not necessarily match their preferences in relation to individual issues. Results for individual services do not necessarily match results for service areas as a whole. Future customers often said that the faster plan represented good value for money and a good investment. Low income customers had more mixed comments, some preferring the suggested plan because they felt it represented a good balance, with others preferring the slower plan on the basis of cost. Some rural customers also commented that the faster plan is good value for money, but others commented that they preferred the suggested plan overall.
Report	**B29. Draft business plan consultation focus groups**

B29 Draft Business Plan Consultation: Focus Groups with Seldom-heard Customers		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	The suggested plan was most popular overall, although future customers often said the faster plan represented good value for money and a good investment. Customers were more likely to chose the suggested or faster plans if the base bill was lower, particularly those for customers with lower incomes.
You get the best possible experience every time you need us	Achieving customer excellence	Most customers preferred the suggested plan for customer experience, with some selecting the slower plan. No future customers or low income customers chose the faster plan. Future customers said that reaching the top 10 of all companies was no important to them. The rural group preferred the slower plan as they felt you should not pay extra for good customer service.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	For vulnerability assistance, the faster plan was more popular with future customers, who felt that paying an extra £1 to help people would be worth it. Low income and rural customers were more divided on this issue. In relation to a social tariff, half of the customers at the focus group strongly agree with supporting all those who could potentially benefit. The greatest number of respondents disagree or strongly disagree with maintaining the current level of the social tariff. However, some future customers felt the cost of this should be met by the government or that they shouldn't have to pay extra to support others.
Saving water before developing new supplies	15% leakage reduction	The suggested plan for leakage was most popular with future and low income customers. No low income customers chose the slower plan. The faster plan was most popular with rural customers, who were surprised by the current levels of leakage and felt this might reduce customer motivation to reduce consumption.
	Metering and water efficiency promotion and support	Low income customers preferred the slower plan for water use, whilst future and rural customers had mixed views.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Future customers preferred the slower plan and felt that other aspects of the plan like leakage or the environment were more important. Low income customers were split between the slower and suggested plans. Rural customers had mixed views.
	Building biodiversity and protecting our environment	Customer views on the local environment were mixed. Low income customers preferred the slower plan, who did not see improving the environment as the responsibility of the bill payer, but this was less popular with rural customers, who commented on the importance of the environment.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Most customers chose the faster plan for water taste, and no customers chose the slower plan for water clarity. For water quality, all future customers chose the faster plan, saying it is the same as the suggested plan. The faster plan was also popular withlow income customers, although rural customers were more divided.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	For supply interruption, the suggested plan was popular across all three groups. Future customers said that the additional cost for this plan was low, and rural customers said it included a lot of improvements for the cost.
	Resilience – boosting protection for population centres of more than 10,000	The suggested plan was the most popular, although the slower plan was also relatively popular.

Focus groups with: future customers (9 participants); low income customers (10 participants); and rural customers (12 participants)

	High contribution
	Medium contribution
	Low contribution

B30. Draft business plan consultation – overall consultation report

Objectives	**To provide all Bristol Water customers with the opportunity to comment on our draft business plan**
Drivers	Regulatory: demonstrating acceptability of Business Plan to customers
Service attributes	Customer experience, vulnerability assistance, leakage, PCC, enhancing local environment, contribution to the local community, water quality, interruptions to supply, water that doesn’t look clear, water that doesn’t taste or smell right, protection against a major supply event.
Timescale	Apr - Jun 2018
# customers	2,218
Methodology	We created a range of different ways that customers could give feedback on our draft business plan: Online panel – we used a similar survey to the representative survey with our online panel members Interactive survey at roadshows – at the summer roadshows we attended we asked customers to fill in an interactive survey on a tablet Feedback cards – we included feedback questions on the cards we leave when we call and people are out WaterTalk – we created a tear off questionnaire in our WaterTalk magazine that goes to our whole supply area for customers to tear off and send back to us Questionnaire on website – we hosted the draft business plan document and key questions about the plan on our website for customers to comment on. Rep Survey, focus groups
Interdependencies	B26. Customer summit, B28. Draft business plan consultation – representative survey, B29. Draft business plan consultation – focus groups with seldom heard customers, A4g. online panel (Draft business plan)
Outputs	Overall, customers were positive about being asked for feedback on our Draft Business Plan and felt valued and involved in the decision making process. In most cases customers were able to respond to the questions and provided substantive comments and views. All of our plans were acceptable to a clear majority of customers. We therefore are confident that the research is robust and provides solid customer

	evidence to inform our Final Business Plan, as well as the further research on this plan. **Key conclusions** Our Priorities: To add water quality explicitly into our priorities and to do further research on our community commitments. The overall bill impact: We recommend that the final bill level should be no higher than in the suggested plan Individual Performance Commitments: We recommend for all to be at the suggested plan, with some at a lower price. We will carry out further research on our proposals, in particular the community commitments. **Our outcomes:** Continue with suggested plan for excelling at customer experiences Continue with suggested plan for leakage and water efficiency Continue with the suggested plan for safe and reliable. We recommend further research regarding proposals for the environment and community, as they require clear explanation for customers in order to test their support.. Although customers as a whole found the plan acceptable, their sensitivity to this will depend on the level of the bill. Reducing the bill for the suggested programme will build support, in particular: • Amongst the “social renters” customer segment, who are our most price sensitive; • To reflect areas where some customers expect improvements to save money, such as leakage and water efficiency; and • Considering the cost of the package where improvements are about reducing long-term risk, rather than service issues customers generally have experience of, such as safe and reliable supply. **Vulnerability Assistance** Ensure all customers who could benefit from social tariffs do so, with a revised target to increase from 50% of those eligible to 75%, subject to further customer research on future social tariff designs.
Report	**B30a. Draft business plan consultation** **B30b. Draft business plan consultation recommendations and next steps**

B30 Draft Business Plan Consultation: Open Consultation		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	More than 90% of participants agree or strongly agree with the ambition to give customers an affordable bill. The vast majority of comments on the ambitions were about keeping bills affordable. Participants were more likely to accept investment when the overall bill was lower, particularly social renters.
You get the best possible experience every time you need us	Achieving customer excellence	More than 80% of participants agree with the customer experience ambition. Most participants preferred the suggested plan for excellent customer experiences, showing a willingness to pay for some improvements.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	More participants chose the suggested option than the slower or faster options for vulnerability assistance, showing a willingness to pay for some improvements. More participants chose the faster plan for vulnerability assistance than excellent customer experiences. Safely affluent customers were more likely to chose the faster plan and social renters more likely to chose the slower plan.
Saving water before developing new supplies	15% leakage reduction	Participants express mixed views on leakage. The majority of customers mentioning leakage see it as a key area for investment and are willing to pay to address it, although some feel it should be improved without an increase in bill.
	Metering and water efficiency promotion and support	More than 80% of participants agree with the water saving ambition. Most participants prefer the slower plan for water use, but many of the comments on the issue suggest it is important and call for measures to help customers address it.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	The community ambition received the lowest level of agreement, but more than 60% agree with it and less than 10% disagree. Most participants preferred the suggested plan for the local community and environmental resilience outcome but the slower plan for local community contributions individually.
	Building biodiversity and protecting our environment	Participants express mixed views on the environment. Some highlight this as a key concern which should be included in the ambitions but some say this is not a concern for them or for Bristol Water. Social renters were more likely to chose the slower plan.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	Some customers felt that water quality should be included explicitly in the ambitions or commented on the importance of water quality. Most participants preferred the slower plan for water quality. The faster plan was second most popular for water appearance, closely behind the suggested plan. The slower plan was most popular for taste.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	The ambition to keep water flowing to customers' taps is the most popular with participants. However, most participants support the slower plan for supply interruptions, and this performance commitment had the lowest support for the faster plan of all the commitments in the Safe and Reliable Outcome. Most participants who comment on this issue said they had not experienced interruptions or felt they were manageable.
	Resilience – boosting protection for population centres of more than 10,000	Participants preferred the slower plan for major water supply events overall, with those from the online panel preferring the slower plan and those from the representative survey preferring the suggested or faster plans.

Quantitative and qualitative data from 3,646 customers

	High contribution
	Medium contribution
	Low contribution

B31. Acceptability testing

Objectives	**To test the acceptability of key elements of our final business plan with customers, following feedback on our draft business plan consultation**
Drivers	Regulatory: demonstrating acceptability of Business Plan to customers Business: To support the development of the business plan
Service attributes	Customer experience, vulnerability assistance, leakage, PCC, enhancing local environment, contribution to the local community, water quality, interruptions to supply, water that doesn't look clear, water that doesn't taste or smell right, protection against a major supply event.
Timescale	July 2018
# customers	304 household customers
Methodology	We conducted an online survey of 304 household customers, with customers sampled to represent the full range of our customers segments. We asked about: • Acceptability of the final business plan before and after inflation • Whether customers preferred a slower plan at a lower cost • Customer views on incentives • Customer views on our community initiatives performance commitment • Customer views on the company specific adjustment and sharing mechanism
Interdependencies	B32. Future of the Water Sector B33. Final business plan consultation – representative survey B34. Final business plan consultation – focus groups with seldom heard customers
Outputs	Acceptability of final business plan: • 93% of customers thought the final business plan was acceptable before inflation, and 83% when inflation was included • A large majority of customers found that each of our proposed performance commitments was acceptable Whether customers preferred a slower plan at a lower cost • When asked to choose between the suggested plan and a slower plan with a lower bill 82% of customers chose the suggested plan Customer views on incentives • When asked to chose between a range of packages with lower or higher levels of incentive (and therefore bill variability) most customers chose a package with a small level of incentive (c. £4)

- Most customers (80%) favoured small and regular bill changes over a larger bill change if penalties were applied at the end of the period only

Customer views on our community initiatives performance commitment

- Most customers chose to support an incentive for community initiatives, with 42% supporting a £2 incentive level and 33% a £5 level.

Customer views on the company specific adjustment and sharing mechanism

- Most customers wanted Bristol Water to remain their supplier, either regardless of the £3 extra cost of borrowing being offset (38%) or only where the costs of borrowing were offset by service or cost benefits.
- When asked about the additional cost of borrowing in the context of a sharing incentive 53% of customers supported the additional cost only if the proposed sharing mechanism was in place, with 17% supporting the extra cost without sharing and 12% supporting regardless.
- The cost of borrowing was the most common preference when we asked customers what sharing should be linked to, above community initiatives and customer service, which was least preferred.
- Finally we asked customers what level of bill reduction they would expect as compensation for transferring to a larger water company as their supplier. 11% of customer said less than £5, 22% between £5 and £20, 23% between £20 and £50, 19% greater than £50, and 25% said they wouldn't be happy with this change regardless of the bill impact

Report	**B32. Acceptability testing**

B31 Pre-acceptability Testing		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	66% of participants agree with the proposed change in relation to affordable bills for all. They typically favour smaller, regular bill changes, although many were happy to delay. Most customers across all segments wanted cost savings from lower than expected borrowing costs to be used to lower bills.
You get the best possible experience every time you need us	Achieving customer excellence	77% of participants agree with the proposed change for customer satisfaction and 68% with the proposed change for customer service.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	83% of participants agree with the proposed change for reducing leaks. It was one of the highest priorities when participants were asked which areas they wanted incentives for.
	Metering and water efficiency promotion and support	71% of participants agree with the proposed change for helping customers use less water.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	75% of customers support an incentive for community initiatives. Of those who did want to incentivise community initiatives, a larger proportion preferred smaller incentives of aroung +/- £2.
	Building biodiversity and protecting our environment	73% of participants agree with the proposed change for biodiversity.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	87% of participants agree with the proposed change for drinking water quality, 72% for discoloured water and 68% for the taste of tap water. Drinking water quality was the top priority when participants were asked which areas they wanted incentives for.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	67% of participants agree with the proposed change for water interruptions.
	Resilience – boosting protection for population centres of more than 10,000	N/A

	High contribution
	Medium contribution
	Low contribution

B32. Future of the water sector

Objectives	**To explore customer perceptions of the future of water providers and the water sector as a whole**
Drivers	Regulatory: demonstrating acceptability of Business Plan to customers Business: To support the development of the business plan
Service attributes	Customer experience, contribution to the local community, leakage, affordability.
Timescale	July 2018
# customers	400 customers plus four focus groups
Methodology	4 focus groups with Bristol Water customers to gather qualitative information, with a spread of age and customer segments. These were held in two locations: Central Bristol and Chipping Sodbury. 400 online interviews to gather qualitative information, averaging 18 minutes in length. Findings were weighted to Bristol Water's customer base demographics.
Interdependencies	B31. Pre-acceptability testing B33. Final business plan consultation – representative survey B34. Final business plan consultation – focus groups with seldom heard customers
Outputs	Bristol Water is viewed positively in terms of service and cost with other utility/transport providers; more than 85% of customers are satisfied with the service which they receive. More than a third of customers believe that Bristol Water sufficiently invests in the future, but more than half are unsure. Generally, reactions to Bristol Water's business plan are very positive and customers agree with priorities identified. Most are opposed to nationalisation of Bristol Water and the water industry as a whole. Customers expect a nationalised industry to lack investment, customer focus and innovation. Those in favour of privatisation have significantly more trust and belief in Bristol Water, and rate the organisation's performance more highly, than those who favour nationalisation. Customers welcome the idea of community initiatives, with most willing to pay £2 extra and some willing to pay £5. There is substantial endorsement to keep Bristol Water as an independent small

	company.
Report	**B33: Future of the water sector**

B32 Future of the Water Sector		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	A Small Company Premium was considered worthwhile for the levels of service currently experienced and there was no interest in a potential slight reduction linked to borrowing power of larger companies. Sharing of financial success as small bill decrease generally considered unnecessary and commitment to successful outcomes preferable to small bill reduction. 39% believe the cost of water is high or very high, but majority say it is neither night nor low.
You get the best possible experience every time you need us	Achieving customer excellence	N/A
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	N/A
Saving water before developing new supplies	15% leakage reduction	Leakages are considered Bristol Water's key priority to focus on and invest in over the next 5 to 10 years. 1 in 10 feel that treatment of leakages is poor or very poor.
	Metering and water efficiency promotion and support	N/A
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	Customers welcome the idea of community initiatives, with most willing to pay £2 extra and some willing to pay £5. There is a preference for customer input into selection of initiatives. The concept of a social contract to benefit community appeals overall - executive pay is considered a key area to focus on.
	Building biodiversity and protecting our environment	N/A
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	N/A
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	N/A
	Resilience – boosting protection for population centres of more than 10,000	N/A

High contribution
Medium contribution
Low contribution

B33. Final business plan consultation – representative survey

Objectives	To test the acceptability of the Business Plan
Drivers	Regulatory: demonstrating acceptability of Business Plan to customers Business: To support the development of the business plan
Service attributes	Affordability, customer experience, vulnerability assistance, leakage, water efficiency, contribution to the local community, environmental issues, appearance of water, taste of water, supply interruptions.
Timescale	July and August 2018
# customers	679
Methodology	Customers were chosen to be representative of Bristol Water's customers as a whole. Face-to-face interviews were used to target customers in quotas where people do not usually participate in consultation and engagement processes. The "seldom heard" customers represented 7% of the total samples (50 customers). All customers were given the same questions. Customers were screened before being surveyed in order to ensure that they were a Bristol Water customer; that they were solely or jointly responsible for paying the water bill; that they did not work for Bristol Water, Wessex Water, Kier, Pelican or Waltons and that they had not taken part in Bristol Water research in the last 12 months. For the purposes of analysis, customers were also placed into one of six segments, which broadly describe the type of customers: Young Urban Renters; Mature and Measured; Social Renters; Comfortable Families; Safety Affluent; and Thirsty Empty Nesters. A few customers refused to answer the questions which were required to place them in a particular segment, so these customers have been included as 'None of these'.
Interdependencies	B31. Pre-acceptability testing B32. Future of the Water Sector B34. Final business plan consultation – focus groups with seldom heard customers
Outputs	For most areas of the Business Plan, the majority of the survey customers found the proposals either strongly acceptable or acceptable. For the bill level with inflation, 48.7% of customers in the survey found the proposed bill to be strongly acceptable or acceptable. 21.9% of customers in the survey found the proposed bill to be unacceptable or completely unacceptable. The rest were neutral or said they didn't know. For the amount of the bill to be invested in community initiatives, 44.2% of survey

	customers agreed with the £2 figure. 18.9% of customers chose the higher amount and 25.6% chose £0 investment. The rest said they didn't know how much to invest.
Report	**B35-B34: Final business plan consultation – representative survey and Final business plan consultation – focus groups with seldom heard customers**

B33 Final Business Plan Consultation - Representative Survey		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	48.7% of participants agree or strongly agree with the proposed bill level, whilst 21.9% disagree or strongly disagree.
You get the best possible experience every time you need us	Achieving customer excellence	80% of participants agree or strongly agree with proposed improvements to customer service.
	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	80% of participants agree or strongly agree with proposed improvements to customer service.
Saving water before developing new supplies	15% leakage reduction	82% of participants agree or strongly agree with the proposed improvements in relation to water lost through pipe leaks.
	Metering and water efficiency promotion and support	82% of participants agree or strongly agree with helping customers reduce their water usage by 5%.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	44.2% of partipants agree with the £2 figure for investment in community initiatives. 18.9% chose the higher £5 investment and 25.6% chose the £0 investment. 81% of participants agree or strongly agree with the proposals to improve access to reservoirs and provide drinking water fountains.
	Building biodiversity and protecting our environment	82% of participants agree or strongly agree with the proposal to work with the local community on environmental initiatives and 81% agree or strongly agree with improving the number and variety of plants and animals on land where Bristol Water work.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	72% of participants agree or strongly agree with the plans to reduce contacts about discoloured water or the taste of tap water.
	Reducing supply interruptions to 1.8 minutes per customer (our forecast industry top quartile)	72% of participants agree or strongly agree with the plans to reduce interruptions.
	Resilience – boosting protection for population centres of more than 10,000	N/A

	High contribution
	Medium contribution
	Low contribution

B34. Final business plan consultation – focus groups with seldom heard customers

Objectives	**To test the acceptability of the Business Plan**
Drivers	Regulatory: demonstrating acceptability of Business Plan to customers Business: To support the development of the business plan
Service attributes	Affordability, customer experience, vulnerability assistance, leakage, water efficiency, contribution to the local community, environmental issues, water supply.
Timescale	July and August 2018
# customers	32 (9 future customers, 12 low income customers, 11 customers in the control group)
Methodology	The focus groups were designed to match closely the format of the representative survey. Customers were given information on the performance commitments, divided into three service areas. They were shown one service area at a time, given time to ask clarifying questions and then asked to what extent they agreed with the proposed set of performance commitments and why. Notes were taken about what customers said. At the end of discussing each service area, customers were asked to fill in a card indicating their overall levels of support and their overarching comments. Customers were then shown the proposed bill figures, both with and without inflation, from 2020 to 2025 and given time to ask clarifying questions. They were asked how acceptable they found the proposals and why. Customers filled in individual cards at the end. Customers were then told about the proposed community initiatives and invited to asked clarifying questions. They discussed each initiative and then held up a ‘yes’ or a ‘no’ indicate whether they supported the initiative. These votes were recorded, along with notes from the discussion. Customers were then asked for a show of hands to indicate support for the initiatives overall, on a scale from very acceptable to very unacceptable. The variable part of the bill was then explained to customers, who were asked how much of their bill they would be willing to invest in initiatives like the ones they had just discussed. Tallies were recorded as well as notes as to why customers had chosen their preferred amounts. For the Business Plan as a whole, customers were shown a ‘target’ with the Busines Plan in the middle and invited to write their names on the target – the closer to the middle, the more acceptable they found the Business Plan overall. They were also asked to write post-its indicating their overall views on the Business Plan.

Interdependencies	B31. Pre-acceptability testing B32. Future of the Water Sector B33. Final business plan consultation – representative survey
Outputs	For most areas of the Business Plan, the majority of the focus group customers found the proposals either strongly acceptable or acceptable. For the bill level with inflation, acceptability was much higher than for the representative survey customers at 82.8%. It is possible this is because focus group customers were given the opportunity to ask questions and find out more about the figures before voting. For the amount of the bill to be invested in community initiatives, 53.1% of focus group customers agreed with the £2 figure. None of the focus group customers chose the £0 investment – all those who did not choose £2 chose £5 instead. The focus groups produced many positive comments about the Business Plan, especially on the environmental aspects, but there were also many suggestions for amendments or additions. Common suggestions included the need for Bristol Water: • to communicate more clearly to customers how their bill is being spent; • to update customers on progress towards meeting the targets in the Business Plan; and • to explain clearly any increases or decreases to the bill which come as a result of parts of the Business Plan.
Report	B33. Final business plan consultation (combined report with B34 Final business plan consultation – focus groups with seldom heard groups

B34 Final Business Plan Consultation - Focus Groups with Seldom Heard Customers		
Customer priorities	**Customer promises**	**What customers told us**
We give you a bill which you can afford	Lower bills for customers - affordable for all	82.8% of participants agree or strongly agree with the proposed bill level - higher than the amount in the survey. Participants suggested that Bristol Water should communicate more clearly to customers how their bill is being spent and explain any increases or decreased clearly.
You get the best possible experience every time you need us	Achieving customer excellence	None of the focus group members disagree or strongly disagree with the improvements to customer service.
You get the best possible experience every time you need us	Inclusive services that meets customers individual needs, especially when they are most vulnerable. Aiming for zero water poverty	None of the focus group members disagree or strongly disagree with the improvements to customer service. Participants in all three focus groups felt that support for vulnerable customers and those who have difficulty paying needs to be better communicated. Participants in all three groups also raised concerns about how this support would be paid for and whether it would lead to a rise in bills.
Saving water before developing new supplies	15% leakage reduction	None of the focus group members disagree or strongly disagree with the proposal to reduce water lost through leakage.
Saving water before developing new supplies	Metering and water efficiency promotion and support	None of the focus group members disagree or strongly disagree with helping customers reduce water usage.
Trust beyond water – helping you to improve your communities and the local environment	Accountable to the community partners we work with for the wellbeing of society – 'Bristol Water For All'	53.1% of participants agree with the £2 figure for investment in community initiatives. None of the participants chose the £0 investment, all those who did not chose £2 chose £5 instead. None of the focus group members disagree or strongly disagree with the proposals to improve access to reservoirs and provide more drinking fountains.
Trust beyond water – helping you to improve your communities and the local environment	Building biodiversity and protecting our environment	None of the focus group members disagree or strongly disagree with working with the community on environmental initiatives or with the proposal to improve the number and variety of plants and animals on land where Bristol Water work.
Keeping top quality water flowing to your tap	Improving water quality (including contacts for discolouration and taste)	None of the focus group members disagree or strongly disagree with the improvements to water supply. Some commented that they had never experienced the problems referred to in the proposals and felt service was already good.
Keeping top quality water flowing to your tap	Reducing supply interruptions to 1.8 minutes per customer	None of the focus group members disagree or strongly disagree with the improvements to water supply. Some commented that they had never experienced the problems referred to in the proposals and felt service was already good.
Keeping top quality water flowing to your tap	Resilience – boosting protection for population centres of more than 10,000	N/A

High contribution
Medium contribution
Low contribution

B36. Comparative Review of PR19 WTP Results

Objectives	**A comparative anonymised review of stated preference (SP) willingness to pay (WTP) results for 13 water companies from England and Wales.** **To understand whether their own results are 'within the pack' or are outliers.**
Drivers	Regulatory: providing adequate and proportionate valuation data
Service attributes	• Unplanned supply interruption 3-6h, 6-12h, 12-24h, >24h • Planned supply interruption 3-6h, 6-12h, 12-24h, >24h • Taste & odour not ideal (few days) • Discoloured water (few hours) • Occasional low pressure (3-6h per time) • Hosepipe ban (May-Sep) • Restriction on essential use of water (2 months) Works causing road disruption in Bristol area (any duration)
Timescale	June 2018
# Customers	N/A
Methodology	Comparison of PR19 results alongside one another This study compares the results of Bristol Water’s PR19 stated preference studies (Stage 1 and Stage 2) with the results from a range of alternative water companies.

Outputs

For most service measures, as at PR14, the range of PR19 unit values across companies/studies was large.

Company	Households			Non-households		
	PR19 £/hh/year	PR14 £/hh/year	Change (%)	PR19 £/hh/year	PR14 £/hh/year	Change (%)
Dual service companies						
A	29.5	34.0	-13%	77.3	48.2	60%
B	76.6	43.6	75%	1264.6	280.5	351%
E	28.9	44.9	-36%	121.5	299.5	-59%
G	19.3	38.8	-50%	95.1	85.8	11%
J	50.4	16.1	214%	87.0	43.8	99%
M	30.2	24.0	26%	148.6	87.2	70%
Q	13.2	24.0	-45%			
T	35.0	49.6	-30%	279.4	240.1	16%
U	94.3	25.1	275%	201.9	44.3	356%
Water only companies						
C	27.5	17.9	54%	734.4	118.5	520%
I	36.7	12.0	205%	126.5	16.0	691%
L	11.4	31.0	-63%	99.4	51.1	94%
Summary statistics						
Mean	37.7	30.1	25%	294.1	119.5	146%
Median	29.8	28.0	6%	126.5	85.8	47%
Std deviation	24.9	12.2	103%	373.0	103.4	261%
Min	11.4	12.0	-5%	77.3	16.0	383%
Max	94.3	49.6	90%	1264.6	299.5	322%

Report

B36. Comparative review of PR19 WTP results

B36a. Comparative Review of PR19 WRP Results Bristol Water