

Understanding customers' views

PR09 Quantitative Research into Customers' Priorities – Company Reports (England)

Report for Ofwat, Defra, Welsh Assembly Government, CCWater, Environment Agency, DWI, Natural England, Water UK.

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1 Introduction

1.1 Study Background

- 1.1.1 In November 2009, the Water Services Regulation Authority (Ofwat) will set price limits for water and sewerage companies in England and Wales for the five years from 2010 to 2015. This process known as the Periodic Review will bring together the environmental and drinking water quality standards to be met and customer service levels to be achieved into companies' investment plans and through into customers' bills. A key input to the price review process was the need of companies, government and regulators to take account of customers' views.
- 1.1.2 In preparation for setting price limits, each company submitted a Draft Business Plan (DBP) to Ofwat in August 2008. These covered, in detail, the investment proposals for the period 2010 to 2015 and the implications for customers' bills. Each DBP was set in the longer term (25 years) context of each company's Strategic Direction Statement (SDS) published in December 2007. These company DBPs should reflect the views and needs of their customers, as revealed by the company's own research and its analysis of the costs and benefits of different elements of its proposals.
- 1.1.3 Eight stakeholders (Ofwat, Department for Environment, Food and Rural Affairs (Defra), Drinking Water Inspectorate (DWI), Water UK, Environment Agency (EA), Natural England, Welsh Assembly Government (WAG) and Consumer Council for Water (CCWater)) wanted an assessment of customers' views on future services and bill levels which applied a common methodology so that results were comparable between companies. In addition, it was considered valuable to survey customers' reactions to the whole package of proposals and the resultant bill increase that companies had chosen to propose in their DBPs. Where customers received their water and sewerage service from separate companies the survey provided an opportunity to explore the combined impact of these companies' plans. Company research provided values for willingness to pay for individual service improvements and this research is not intended to duplicate this. A customer research study was, therefore, commissioned, in April 2008, to quantify customers' perceptions, and acceptance, of their companies' plans for future water and sewerage services. The research comprised a survey of bill-payers to obtain their views on existing and proposed future services, using summary show material based on figures from companies' DBPs.
- 1.1.4 A large survey was undertaken in September to November 2008. The sample of more than 6,000 respondents was designed to elicit the views of bill-payers in England and Wales.

1.2 Study Reports

- 1.2.1 The data has been analysed and reported at company and overall (England/Wales combined) level.
- 1.2.2 This document provides a full account of the responses to every question by customers interviewed in each of the 20 company areas in England. A separate report includes the findings for the two Welsh companies.

1 Introduction

- 1.2.3 A separate report¹ provides an overall (England and Wales combined) overview of the findings. It also sets out the specific objectives of the research and describes the survey methodology.

1.3 Contents of this Report

- 1.3.1 There are 20 subsequent sections to this report, one for each water company in England. For each company, we have provided:

- a summary of key findings specific to each company;
- a description of how, using show-cards, each company's proposals for the period 2010-2015 (in terms of service improvements and price increases) were presented to customers; and
- reports of the perceptions and attitudes of customers. Customers' responses are reported in relation to several key themes.

- 1.3.2 The themes addressed in this report are as follows:

- views on water and sewerage issues alongside wider social issues, such as health services, immigration, education, transport and crime prevention;
- awareness/understanding of company(ies) responsibilities;
- overall satisfaction of the current service they receive;
- approach to paying their bills;
- value for money of the current service they receive;
- contact with their water/water and sewerage company;
- general overview of company's proposed service offering and the bill level and whether or not this would be acceptable;
- detailed description of the current service level and costs, and whether this is offers value for money;
- views on their company's proposed service offering and the bill level (according to their DBP) and whether or not this would be acceptable, and offers value for money;
- service areas that would cause most concern if they were delayed;
- determining customers' preferences with regard to introducing and continuing bill increases over the 5 year period 2010-2015; and
- demographic information.

¹ PR09 Quantitative Research into Customers' Priorities – Overall Report, MVA Consultancy (2009)

1 Introduction

1.3.3 Table 1.1 shows the order in which these company findings are set out in the report:

Table 1.1 Sequence of company reports

Section in report	Company
1	Anglian
2	Bournemouth & West Hampshire
3	Bristol
4	Cambridge
5	Essex & Suffolk
6	Folkestone & Dover
7	Northumbrian
8	Portsmouth
9	Severn Trent
10	South East
11	South Staffordshire
12	South West
13	Southern
14	Sutton & East Surrey
15	Tendring Hundred
16	Thames
17	Three Valleys
18	United Utilities
19	Wessex
20	Yorkshire

1.3.4 Both in this and the Welsh company report, and in the overall report, we document customers' views according to customer area. Thus, where customers have separate water and sewerage service providers, customer responses to individual sewerage service proposals are reported alongside all other customer responses in the water only company area.

1.3.5 The sewerage service provider in each water only company area in England is as follows:

- Anglian Water supplies sewerage services for: Cambridge Water, Essex & Suffolk Water and Tendring Hundred;
- Severn Trent Water supplies sewerage services for: South Staffordshire Water;
- Southern Water supplies sewerage services for: Folkestone & Dover Water, Portsmouth Water and South East Water;
- Thames Water supplies sewerage services for: Three Valleys Water, Sutton & East Surrey Water, South East Water and Essex & Suffolk Water; and
- Wessex Water supplies sewerage services for: Bournemouth & West Hampshire Water and Bristol Water.

1 Introduction

- 1.3.6 To aid company comparisons, customer reaction to each question, in turn, is reported by company, nationally (England and Wales) and overall in Appendix E of the overall report. A copy of the questionnaire is in Appendix A of the overall report.

1. Key Findings

Anglian Water is a water and sewerage company billing 1,804,400 properties for water and 2,347,340 properties for sewerage services.

Uninformed Views of Current and Future Services

□ 84% of customers stated that they were **satisfied** with the services provided by Anglian Water, whereas 11% of customers indicated that they were dissatisfied with the service. The main reason customers were satisfied was that there were no problems (60%). The main reasons that customers were dissatisfied were that it was too expensive already (56%) and there was a poor/unreliable water service (16%).

□ 67% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the service was worth the money (38%) and that the bill was affordable (25%). 15% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (59%).

□ Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 62% felt that the overall company plan was **acceptable**, 34% felt that it was **unacceptable**, and 5% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

□ 61% of customers stated that the current water service was **good value for money**, 58% stated the current sewerage service was good value for money, and 54% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (40%) and the service was worth the money (32%).

□ 18% of customers stated that the current water service was **poor value for money**, 17% stated the current sewerage service was poor value for money, and 16% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (75%).

□ The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.40 for **water** services, 3.42 for **sewerage** services, and 3.36 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

□ 65% of customers felt that Anglian Waters' DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the improvements are worth the money (36%) and the plan is affordable (34%).

□ 30% of customers felt that Anglian Waters' DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (60%), and they cannot afford it (16%).

□ 62% of customers felt that Anglian Waters' DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (38%) and the improvements are worth the money (33%).

□ 31% of customers felt that Anglian Waters' DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (62%), they cannot afford it (17%).

□ 63% of customers felt that Anglian Waters' DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (39%) and the improvements are worth the money (33%).

□ 32% of customers felt that Anglian Waters' DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (64%), and they cannot afford it (16%).

Value for Money

□ The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.22 for **water** services, 3.17 for **sewerage** services, and 3.37 for services **overall**.

□ The proportion of customers rating the proposed DBP services as **good value for money** were 44% (water service), 40% (sewerage) and 47% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 21% (water service), 21% (sewerage service) and 20% (service overall).

Timing

□ 57% of Anglian Water customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year, whereas 26% would like to see bills change every year according to how much work water companies have to do.

2. Introduction

The attitudes and preferences of Anglian Water customers, reported in section 3, are based on a sample of 300. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis.

The views of sewerage customers on sewerage issues have been given for the relevant water only companies in Section 3.7

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	87%	93%	92%	78%	92%	85%	87%	78%	85%	93%	84%	81%	90%	83%	85%	89%	95%	86%	83%	89%
Transport	86%	79%	89%	85%	91%	83%	87%	88%	87%	84%	91%	81%	87%	89%	89%	89%	82%	84%	87%	86%
Health Services	98%	100%	97%	98%	100%	96%	98%	98%	98%	97%	97%	96%	99%	96%	100%	96%	96%	98%	96%	98%
Crime Prevention	94%	90%	96%	93%	96%	93%	93%	92%	97%	91%	100%	91%	94%	87%	98%	96%	96%	94%	90%	96%
Environment	94%	86%	97%	93%	94%	91%	97%	92%	94%	94%	100%	92%	95%	93%	91%	93%	96%	96%	90%	96%
Cost of Living	98%	90%	98%	100%	96%	98%	98%	98%	98%	97%	100%	96%	99%	96%	98%	93%	98%	99%	99%	97%
Immigration	67%	60%	73%	60%	70%	65%	68%	53%	73%	66%	59%	63%	71%	58%	60%	59%	73%	75%	68%	67%
Water and Sewerage Services	98%	95%	98%	98%	96%	97%	99%	98%	98%	97%	100%	97%	98%	100%	96%	100%	100%	96%	97%	98%
Utility Services	97%	98%	97%	96%	98%	96%	97%	92%	98%	97%	97%	98%	96%	93%	95%	100%	100%	97%	96%	97%
TOTAL	91%	88%	93%	89%	93%	89%	92%	88%	92%	91%	92%	88%	92%	88%	90%	91%	93%	92%	90%	92%
No of respondents	294	42	149	96	53	137	102	50	127	115	32	97	139	54	55	27	44	114	104	190

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	51%	45%	52%	54%	51%	48%	56%	66%	50%	45%	47%	49%	51%	53%	57%	41%	50%	51%	52%	51%
Improving air quality	26%	26%	23%	31%	16%	31%	24%	32%	24%	26%	16%	25%	28%	31%	29%	22%	17%	27%	21%	29%
Reducing climate change	32%	38%	34%	27%	53%	29%	25%	22%	29%	39%	28%	29%	35%	22%	38%	30%	39%	32%	32%	32%
More activity on nature conservation etc	12%	14%	15%	6%	16%	13%	10%	10%	10%	15%	6%	13%	12%	7%	13%	7%	22%	12%	11%	13%
Reducing litter and household waste	41%	45%	41%	40%	35%	43%	42%	32%	43%	43%	50%	41%	41%	45%	38%	41%	43%	40%	42%	41%
Improvements to tackling flooding	17%	12%	16%	20%	16%	14%	20%	16%	18%	16%	25%	18%	16%	22%	16%	30%	15%	12%	17%	16%
Encouraging people to use less water	9%	5%	8%	12%	7%	8%	13%	12%	12%	5%	19%	9%	8%	9%	5%	7%	7%	13%	12%	8%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	79%	71%	82%	79%	76%	86%	73%	78%	85%	74%	91%	79%	79%	76%	91%	70%	80%	77%	77%	81%
Removal and treatment of waste water	68%	60%	69%	71%	67%	71%	64%	68%	73%	63%	81%	64%	69%	65%	77%	59%	70%	66%	61%	72%
Dealing with sewer flooding	51%	48%	55%	51%	53%	52%	50%	50%	56%	48%	53%	49%	50%	44%	57%	41%	59%	52%	51%	51%
Maintaining pipes, treatment works, and other infrastructure	53%	62%	54%	48%	49%	54%	53%	52%	58%	47%	72%	54%	50%	58%	52%	52%	61%	48%	57%	51%
Protecting the water environment	56%	71%	55%	55%	56%	60%	51%	60%	54%	57%	50%	55%	56%	55%	63%	67%	61%	50%	57%	56%
Managing water pollution from agriculture and manufacturing	40%	40%	40%	40%	42%	45%	31%	40%	45%	33%	47%	37%	38%	36%	45%	48%	50%	33%	45%	37%
Drainage of roads	43%	38%	44%	45%	42%	47%	36%	40%	43%	45%	63%	43%	38%	40%	45%	48%	46%	41%	46%	41%
Reducing litter in waterways	48%	50%	44%	54%	47%	47%	48%	46%	49%	47%	56%	45%	48%	55%	50%	48%	41%	46%	42%	51%
Preventing flooding from rivers	45%	36%	44%	54%	49%	42%	46%	48%	45%	45%	47%	36%	52%	47%	55%	48%	35%	43%	49%	44%
Managing canal systems	31%	29%	31%	30%	31%	34%	26%	32%	31%	31%	31%	28%	33%	29%	39%	41%	24%	28%	32%	30%
Helping to reduce greenhouse gas emissions and tackle climate change	35%	29%	35%	37%	45%	36%	27%	36%	34%	36%	47%	28%	36%	36%	45%	30%	37%	30%	35%	35%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

Q12. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR APPROACH TO PAYING YOUR BILL/S?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't find it difficult to pay on time	73%	67%	72%	78%	78%	81%	60%	76%	77%	68%	91%	76%	70%	65%	76%	88%	80%	69%	75%	72%
I usually pay on time, but it can be difficult	21%	21%	21%	21%	13%	16%	30%	18%	20%	23%	6%	17%	25%	30%	18%	8%	13%	23%	21%	20%
I sometimes pay late depending on what other bills I have to pay	2%	0%	3%	0%	0%	1%	3%	0%	1%	3%	0%	2%	1%	0%	2%	4%	0%	3%	1%	2%
I often find it a challenge and have to delay payments as long as possible	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't usually pay my bills on time	1%	0%	1%	0%	2%	0%	1%	2%	0%	1%	0%	1%	1%	2%	0%	0%	0%	1%	1%	1%
Don't know/can't say	4%	12%	4%	1%	7%	1%	6%	4%	3%	5%	3%	4%	3%	4%	4%	0%	7%	4%	2%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	296	42	151	96	54	137	102	50	128	116	32	96	142	54	55	26	46	115	105	191

Please note this question was only asked to sole/joint responsibility bill payers.

Q13. HAVE YOU/HOUSEHOLD MEMBER CONTACTED YOUR WATER AND SEWERAGE COMPANY OTHER THAN TO PAY THE BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	8%	10%	6%	8%	9%	9%	6%	4%	10%	7%	19%	11%	3%	7%	7%	7%	7%	2%	10%	7%
No	90%	88%	90%	92%	87%	91%	91%	94%	88%	92%	78%	89%	94%	93%	91%	93%	91%	22%	89%	91%
Don't know/can't say	2%	2%	3%	0%	4%	1%	3%	2%	2%	2%	3%	0%	2%	0%	2%	0%	0%	2%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	23%	100%	100%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

Q14. WHAT WAS THE REASON FOR THE CONTACT?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
To make a complaint	30%	29%	30%	17%	22%	21%	29%	67%	12%	30%	17%	24%	17%	25%	29%	33%	33%	15%	23%	24%
General enquiry	35%	29%	30%	25%	44%	29%	0%	0%	24%	40%	17%	29%	33%	50%	43%	0%	0%	23%	8%	41%
Request information	26%	14%	10%	25%	11%	21%	29%	0%	29%	10%	17%	18%	33%	25%	14%	33%	67%	8%	31%	12%
To report a problem	30%	29%	20%	25%	22%	21%	29%	33%	24%	20%	33%	24%	17%	0%	14%	33%	0%	38%	31%	18%
To obtain a water meter	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Payment issue - not specified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a change of address	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To make an enquiry on the billing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	4%	0%	10%	0%	0%	7%	0%	0%	6%	0%	17%	0%	0%	0%	0%	0%	0%	8%	8%	0%
Can't remember	4%	0%	0%	8%	0%	0%	14%	0%	6%	0%	0%	6%	0%	0%	0%	0%	0%	8%	0%	6%
TOTAL	130%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	23	7	10	12	9	14	7	3	17	10	6	17	6	4	7	3	3	13	13	17

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	16%	17%	12%	22%	7%	15%	21%	20%	15%	15%	6%	10%	19%	24%	9%	15%	11%	17%	16%	15%
Unacceptable	18%	33%	19%	10%	18%	17%	18%	14%	15%	23%	3%	22%	17%	16%	16%	19%	15%	20%	12%	21%
Acceptable	60%	40%	60%	64%	64%	63%	53%	60%	64%	55%	91%	58%	56%	56%	71%	52%	65%	55%	63%	58%
Very acceptable	2%	0%	3%	1%	4%	3%	0%	2%	2%	2%	0%	3%	2%	2%	2%	4%	4%	1%	4%	1%
Don't know/can't say	5%	10%	5%	3%	7%	3%	7%	4%	5%	6%	0%	7%	6%	2%	2%	11%	4%	7%	5%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

3.3 Informed Views on Current Services

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years
	Ensure the safety of tap water - drinking water quality	99.96% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 8,412 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	651 properties at risk of low water pressure at the tap. Supplies to 588 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.9% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 2.3% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 8 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £158
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	422 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	389 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £197
	CURRENT AVERAGE TOTAL BILL = £355	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	8%	7%	6%	12%	4%	7%	12%	10%	11%	4%	0%	3%	12%	18%	7%	0%	2%	8%	10%	7%
Fairly poor value for money	10%	12%	14%	4%	11%	12%	7%	8%	9%	13%	3%	7%	13%	2%	9%	22%	7%	13%	7%	12%
Neither poor nor good value for money	19%	17%	19%	21%	20%	19%	19%	16%	19%	20%	13%	19%	21%	11%	16%	15%	17%	26%	23%	17%
Fairly good value for money	57%	57%	56%	56%	56%	57%	55%	56%	57%	56%	72%	65%	49%	64%	63%	56%	65%	47%	50%	60%
Very good value for money	4%	5%	3%	5%	7%	3%	5%	8%	5%	3%	13%	5%	3%	5%	4%	4%	9%	3%	8%	3%
Don't know/can't say	2%	2%	2%	2%	2%	2%	2%	2%	0%	4%	0%	1%	3%	0%	2%	4%	0%	3%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.40	3.41	3.38	3.38	3.54	3.37	3.36	3.45	3.36	3.42	3.94	3.63	3.19	3.36	3.47	3.42	3.72	3.25	3.39	3.41
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

3.4 Informed Views on the Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£1
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years	Maintain current service	£2
	99.96% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£1
	Approximately 8,412 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	<50p
	651 properties at risk of low water pressure at the tap. Supplies to 588 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain at 651 the number of properties at risk of low water pressure. 725 properties affected by unplanned interruptions	£0
	99.9% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 2.3% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	32 assets better protected from severe weather safeguarding service for 3.6 million people	£1
	Fish and wildlife at 8 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 8 sites; plus water levels at 8 sites will be restored and protected enabling fish and wildlife to thrive	<50p
WATER BILL - FROM £160 IN 2010 TO £164 IN 2014/5			£4
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service for these services and reduce smells from sewage treatment works	£3
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£3
	422 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 149 properties at risk of internal flooding from sewers at least once in ten years	<50p
	389 areas at risk of external flooding from sewers at least once in ten years	Reduce by 133 the areas at risk of external flooding from sewers at least once in ten years	<50p
	Sewerage system could occasionally be disrupted e.g. by extreme events	367 assets better protected from severe weather safeguarding service for 2.8 million people	<50p
	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 240km of river can better support fish and 330km can better support other wildlife: plus 8 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£3
	SEWERAGE BILL - FROM £200 IN 2010 TO £209 IN 2014/5		
TOTAL COMBINED BILL - FROM £360 IN 2010 TO £373 BY 2014/5			£13

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	15%	16%	13%	14%	8%	16%	16%	17%	8%	20%	15%	10%	18%	16%	7%	26%	17%	14%	16%	13%
Improvements are worth the money	33%	32%	37%	30%	36%	34%	32%	41%	31%	34%	41%	44%	24%	23%	36%	26%	37%	38%	39%	30%
Plan is affordable	38%	42%	39%	33%	51%	35%	32%	28%	44%	35%	37%	41%	35%	35%	45%	37%	43%	31%	34%	39%
Have no choice but to pay	1%	0%	0%	2%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	2%	0%	1%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	14%	11%	10%	21%	5%	14%	20%	14%	15%	11%	7%	4%	22%	26%	12%	11%	3%	16%	10%	16%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	186	19	97	63	39	88	56	29	84	71	27	68	79	31	42	19	30	64	67	119

Q25. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN AS A WHOLE AND THE IMPACT ON YOUR OVERALL BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	13%	12%	12%	15%	7%	14%	15%	18%	12%	13%	3%	11%	15%	25%	11%	11%	4%	12%	11%	14%
Unacceptable	19%	36%	18%	15%	13%	17%	26%	20%	17%	21%	9%	12%	24%	16%	16%	11%	17%	24%	17%	20%
Acceptable	60%	43%	61%	64%	69%	60%	53%	58%	63%	58%	78%	69%	53%	53%	68%	70%	63%	56%	61%	59%
Very acceptable	3%	2%	3%	3%	5%	3%	2%	2%	3%	3%	9%	2%	3%	4%	5%	0%	7%	1%	3%	3%
Don't know/can't say	5%	7%	6%	2%	5%	6%	4%	2%	5%	6%	0%	5%	6%	2%	0%	7%	9%	7%	8%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

Q26. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	4%	15%	2%	0%	9%	7%	0%	5%	3%	5%	0%	4%	2%	0%	0%	17%	20%	2%	3%	5%
Improvements not worth the money	6%	10%	2%	10%	9%	7%	5%	0%	8%	8%	25%	9%	4%	4%	13%	0%	10%	5%	7%	6%
Too expensive already	64%	55%	61%	73%	55%	65%	64%	63%	73%	55%	50%	30%	76%	61%	80%	50%	50%	64%	67%	62%
Cannot afford it	16%	0%	24%	13%	9%	9%	24%	21%	8%	20%	25%	22%	15%	26%	7%	17%	20%	12%	10%	18%
Oppose paying more for a natural resource	1%	0%	2%	0%	9%	0%	0%	0%	3%	0%	0%	0%	2%	0%	0%	0%	0%	2%	0%	2%
Oppose paying more to companies who make large profits	6%	10%	7%	3%	9%	7%	5%	5%	5%	8%	0%	22%	2%	4%	0%	17%	0%	10%	10%	5%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	0%	2%	0%	0%	2%	0%	5%	0%	0%	0%	4%	0%	0%	0%	0%	0%	2%	0%	2%
Don't know/can't say	2%	10%	0%	0%	0%	2%	2%	0%	0%	5%	0%	9%	0%	4%	0%	0%	0%	2%	3%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	96	20	46	30	11	43	42	19	37	40	4	23	55	23	15	6	10	42	30	66

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	15%	21%	12%	12%	7%	17%	16%	10%	13%	18%	7%	13%	18%	16%	12%	21%	13%	15%	18%	13%
Improvements are worth the money	33%	16%	37%	34%	37%	36%	26%	47%	29%	32%	46%	39%	26%	19%	39%	26%	34%	36%	42%	28%
Plan is affordable	39%	47%	37%	40%	49%	33%	42%	33%	45%	35%	39%	43%	35%	45%	41%	42%	41%	33%	33%	43%
Other	1%	0%	0%	2%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	2%	0%	1%
Don't know/can't say	13%	16%	13%	12%	7%	13%	16%	10%	12%	15%	7%	4%	20%	19%	7%	11%	13%	14%	7%	16%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	189	19	99	65	41	88	57	30	85	72	28	69	80	31	41	19	32	66	67	122

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	6%	6%	25%	47%	13%	3%	300
Ensure a reliable and continuous water supply	6%	6%	25%	46%	15%	2%	300
Ensure the safety of tap water – drinking water quality	5%	8%	19%	49%	17%	1%	300
Manage the appearance, taste and smell of tap water	6%	6%	22%	45%	20%	1%	300
Manage the pressure of water in your taps and the number of unplanned interruptions	5%	8%	21%	49%	16%	1%	300
Handle customers' accounts, queries, complaints and customers with special needs	6%	7%	25%	47%	14%	1%	300
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	6%	7%	27%	42%	15%	3%	300
Manage the amount of water taken from the environment to supply customers	5%	7%	19%	49%	18%	1%	300
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	7%	27%	43%	15%	1%	300
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	6%	6%	20%	48%	17%	2%	300
Avoid risk of homes being flooded with sewage	6%	6%	22%	48%	18%	0%	300
Avoid risk of properties being flooded with sewage outside the home	6%	8%	20%	48%	18%	*%	300
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	7%	6%	26%	43%	17%	2%	300
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	6%	6%	18%	49%	20%	2%	300
TOTAL	6%	7%	23%	47%	17%	2%	300

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.57	3.49	3.54	3.59	3.76	3.53	3.49	3.45	3.53	3.65	3.84	3.65	3.45	3.31	3.55	3.78	3.73	3.59	3.63	3.53
Ensure a reliable and continuous water supply	3.59	3.60	3.62	3.49	3.82	3.51	3.55	3.51	3.47	3.75	3.56	3.71	3.50	3.24	3.60	3.56	3.87	3.65	3.65	3.56
Ensure the safety of tap water – drinking water quality	3.67	3.55	3.69	3.66	3.89	3.58	3.64	3.63	3.63	3.71	3.84	3.80	3.54	3.33	3.69	3.81	3.83	3.71	3.65	3.67
Manage the appearance, taste and smell of tap water	3.69	3.60	3.76	3.56	3.85	3.57	3.72	3.57	3.61	3.80	3.88	3.81	3.54	3.44	3.55	3.85	3.87	3.75	3.67	3.69
Manage the pressure of water in your taps and the number of unplanned interruptions	3.64	3.52	3.69	3.56	3.80	3.54	3.66	3.40	3.64	3.72	3.91	3.75	3.49	3.38	3.63	3.70	3.78	3.69	3.68	3.61
Handle customers' accounts, queries, complaints and customers with special needs	3.58	3.54	3.61	3.51	3.74	3.55	3.52	3.42	3.55	3.68	3.91	3.70	3.45	3.24	3.71	3.59	3.71	3.64	3.53	3.61
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.55	3.46	3.60	3.47	3.75	3.51	3.48	3.45	3.46	3.68	3.87	3.60	3.45	3.24	3.65	3.78	3.64	3.56	3.53	3.56
Manage the amount of water taken from the environment to supply customers	3.70	3.62	3.73	3.65	3.84	3.69	3.60	3.52	3.66	3.80	3.94	3.80	3.55	3.36	3.80	3.85	3.77	3.74	3.67	3.71
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.54	3.43	3.55	3.54	3.74	3.47	3.50	3.38	3.51	3.64	3.77	3.69	3.39	3.26	3.55	3.63	3.70	3.59	3.52	3.56
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.67	3.56	3.66	3.66	3.76	3.67	3.57	3.52	3.62	3.77	3.94	3.85	3.46	3.44	3.63	3.73	3.80	3.73	3.71	3.64
Avoid risk of homes being flooded with sewage	3.67	3.60	3.66	3.67	3.78	3.63	3.62	3.52	3.63	3.76	3.91	3.72	3.56	3.44	3.59	3.59	3.80	3.78	3.69	3.66
Avoid risk of properties being flooded with sewage outside the home	3.64	3.64	3.65	3.56	3.75	3.63	3.54	3.46	3.58	3.75	3.84	3.74	3.49	3.33	3.70	3.70	3.85	3.65	3.66	3.62
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.59	3.45	3.62	3.56	3.69	3.59	3.50	3.41	3.56	3.69	3.72	3.68	3.49	3.30	3.68	3.56	3.78	3.63	3.60	3.59
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.72	3.57	3.75	3.69	3.93	3.69	3.61	3.52	3.70	3.82	3.94	3.86	3.58	3.36	3.75	3.81	3.89	3.78	3.73	3.72
TOTAL	3.63	3.54	3.65	3.58	3.79	3.58	3.57	3.48	3.58	3.73	3.85	3.74	3.50	3.33	3.65	3.71	3.79	3.68	3.64	3.62
No of respondents	300	41	149	94	55	133	100	49	125	115	31	93	142	54	55	27	44	111	102	189

Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

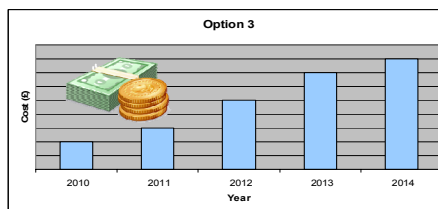
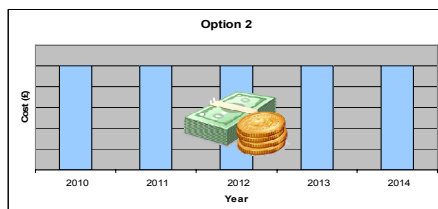
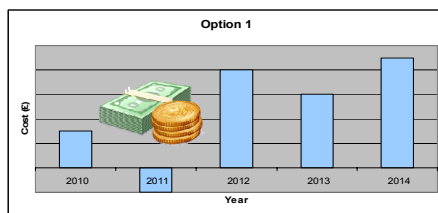
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	28%	38%	26%	27%	27%	29%	29%	36%	22%	32%	25%	20%	35%	35%	32%	26%	28%	24%	32%	26%
Ensure a reliable and continuous water supply	37%	43%	36%	37%	31%	36%	42%	38%	39%	35%	22%	26%	49%	40%	38%	41%	30%	38%	30%	42%
Ensure the safety of tap water – drinking water quality	67%	67%	66%	69%	60%	67%	70%	76%	64%	66%	69%	62%	70%	71%	73%	52%	63%	66%	67%	67%
Manage the appearance, taste and smell of tap water	39%	33%	36%	46%	36%	37%	42%	40%	39%	40%	44%	34%	42%	40%	34%	37%	39%	42%	38%	40%
Manage the pressure of water in your taps and the number of unplanned interruptions	14%	5%	17%	11%	15%	17%	9%	12%	12%	15%	16%	11%	15%	11%	18%	11%	24%	9%	13%	14%
Handle customers' accounts, queries, complaints and customers with special needs	11%	12%	12%	8%	7%	12%	13%	12%	12%	10%	19%	11%	10%	7%	13%	26%	11%	9%	10%	12%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	7%	10%	6%	5%	5%	8%	6%	6%	7%	6%	0%	6%	7%	5%	4%	11%	9%	7%	7%	7%
Manage the amount of water taken from the environment to supply customers	5%	2%	6%	3%	7%	3%	6%	4%	2%	8%	6%	5%	4%	5%	4%	7%	7%	3%	6%	4%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	5%	3%	4%	4%	4%	4%	4%	5%	3%	16%	5%	1%	7%	4%	0%	4%	3%	5%	4%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	5%	0%	5%	6%	5%	4%	6%	6%	5%	3%	0%	7%	4%	5%	5%	7%	0%	5%	6%	4%
Avoid risk of homes being flooded with sewage	3%	5%	3%	2%	2%	2%	4%	2%	3%	3%	3%	4%	2%	4%	5%	7%	0%	1%	2%	3%
Avoid risk of properties being flooded with sewage outside the home	2%	5%	2%	1%	2%	4%	0%	0%	2%	3%	0%	2%	3%	0%	4%	0%	2%	3%	2%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	4%	2%	2%	6%	2%	4%	4%	6%	3%	3%	6%	3%	3%	7%	4%	0%	2%	3%	4%	4%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	0%	1%	1%	2%	1%	0%	0%	2%	1%	0%	0%	2%	0%	2%	0%	2%	1%	0%	2%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	26%	29%	23%	30%	18%	26%	30%	28%	28%	24%	13%	11%	39%	35%	30%	15%	13%	28%	25%	27%
Bills show one big change in first year, then stay the same for the following four years	17%	19%	18%	13%	22%	17%	16%	18%	16%	18%	9%	21%	15%	15%	16%	22%	26%	14%	19%	16%
Bills change steadily every year, so that customers do not see big changes from year to year	57%	52%	58%	57%	60%	58%	54%	54%	57%	59%	78%	68%	47%	51%	54%	63%	61%	58%	56%	57%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	300	42	154	97	55	139	103	50	129	119	32	97	144	55	56	27	46	116	105	195



3.6 Other Company Information

GENDER

	Total
Male	47%
Female	53%
No of respondents	300

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	63%
Jointly responsible for household finances along with spouse/partner	35%
Contributor to shared household expenses (e.g. house/flatmate, parents)	1%
Payment through private rent	0%
Payment through Council rent/social housing	0%
Other	0%
Refused	0%
No of respondents	300

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	41%
Employed Part-time (9-29 hours)	14%
Retired	33%
Not working and not looking for work	6%
Student	1%
Not working and looking for work	3%
Other	*%
Refused	1%
No of respondents	300

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	10%
B	10%
C	12%
D	9%
E	2%
F	*%
G	1%
H	1%
Don't know	54%
No of respondents	300

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	2%
Don't increase / should reduce charges	4%
Generally receive good level of service / happy with service	*%
Service is reliable	0%
Want a water meter installed	*%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	*%
Solve the water pressure problem	1%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	*%
Solve the problems that cause flooding	1%
Improve drainage system / solve problems with blockages	*%
Deal with hard water / lime scale problem	*%
Reduce bad smells	2%
Have special rates for certain customer groups (pensioners, families)	*%
Increase in charges should be linked to improvements	2%
Protect nature / wildlife / environment	*%
Plan should already be in action / already doing things like this	1%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	*%
Improve level of service / customer service / customer information	2%
Reduce the number / there are too many chemicals added to water	*%
Reduce number of leakages / increase repairs to pipes	*%
Other	*%
None	85%
Don't know	0%
Refused	*%
No of respondents	300

**Please note: multiple responses were allowed in this question

3.7 Views of your sewerage customers in WoC areas

For respondents views of the total water and sewerage package please refer to reports on specific water only companies.

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)?

(% who consider it fairly important/very important)

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Education	87%	84%	89%	92%
Transport	86%	89%	93%	95%
Health Services	98%	98%	97%	97%
Crime Prevention	94%	96%	98%	96%
Environment	94%	95%	97%	96%
Cost of Living	98%	95%	98%	97%
Immigration	67%	56%	79%	65%
Water and Sewerage Services	98%	93%	96%	96%
Utility Services	97%	94%	97%	94%
TOTAL	91%	89%	94%	92%
No of respondents	294	253	258	249

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Protecting the water environment	51%	48%	31%	8%
Improving air quality	26%	21%	47%	34%
Reducing climate change	32%	53%	51%	45%
More activity on nature conservation etc	12%	12%	10%	5%
Reducing litter and household waste	41%	32%	29%	41%
Improvements to tackling flooding	17%	14%	13%	9%
Encouraging people to use less water	9%	8%	5%	8%
No of respondents	300	254	260	250

Q4. WHICH OF THE SERVICES PROVIDED BY YOUR WATER & SEWERAGE COMPANY DO YOU FEEL ARE MOST IMPORTANT?

(multiple response question)

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Providing safe, reliable, clean drinking water	78%	88%	80%	80%
Removal and treatment of waste water	47%	66%	48%	48%
Dealing with sewer flooding	30%	30%	33%	11%
Maintaining pipes, treatment works, and other infrastructure	31%	41%	37%	44%
Protecting the water environment	28%	29%	27%	9%
Drainage of roads	19%	15%	18%	15%
Dealing with customer complaints & enquiries	22%	9%	15%	8%
Helping to reduce greenhouse gas emissions & tackle climate change	14%	10%	10%	9%
No of respondents	300	254	260	250

Q7. APPROXIMATELY HOW MUCH DO YOU PAY FOR YOUR WATER AND SEWERAGE SERVICE PER YEAR?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
£1 - £99	5%	3%	5%	2%
£100 - £199	10%	17%	8%	10%
£200 - £299	10%	19%	23%	20%
£300 - £399	25%	34%	25%	25%
£400 - £499	30%	13%	10%	16%
£500 - £599	9%	8%	8%	15%
£600 - £699	5%	4%	8%	7%
£700 - £799	2%	1%	7%	2%
£800 - £899	1%	2%	1%	0%
£900 - £999	0%	0%	1%	1%
£1000 +	3%	0%	6%	1%
TOTAL	100%	100%	100%	100%
No of respondents	150	119	106	124

Q8. HOW CONFIDENT ARE YOU THAT YOU HAVE ESTIMATED YOUR BILLS ACCURATELY?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Not at all confident	7%	0%	12%	1%
Not very confident	19%	11%	20%	22%
Fairly confident	68%	73%	57%	69%
Very confident	5%	15%	11%	8%
Don't know	1%	1%	0%	0%
TOTAL	100%	100%	100%	100%
No of respondents	150	119	106	124

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Completely unacceptable	16%	10%	12%	6%
Unacceptable	18%	35%	23%	22%
Acceptable	60%	43%	62%	63%
Very acceptable	2%	3%	2%	2%
Don't know/can't say	5%	9%	2%	8%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Q17. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SEWERAGE SERVICE IN TERMS OF VALUE FOR MONEY?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	8%	4%	5%	3%
Fairly poor value for money	9%	22%	17%	12%
Neither poor nor good value for money	22%	23%	11%	21%
Fairly good value for money	51%	41%	53%	52%
Very good value for money	7%	7%	11%	7%
Don't know/can't say	3%	3%	2%	5%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

(1 represents very poor value for money and 5 represents very good value for money)

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Mean value for money score	3.42	3.25	3.50	3.51
No of respondents	300	254	260	250

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE BILL?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Completely unacceptable	10%	7%	7%	3%
Unacceptable	21%	35%	25%	26%
Acceptable	60%	45%	63%	61%
Very acceptable	2%	3%	2%	2%
Don't know/can't say	6%	10%	3%	8%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS UNACCEPTABLE?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
I don't value the improvements	5%	7%	7%	4%
Improvements not worth the money	4%	11%	8%	10%
Too expensive already	62%	66%	61%	64%
Cannot afford it	17%	8%	9%	4%
Oppose paying so much for a natural resource	1%	2%	1%	4%
Oppose paying so much to companies who make large profits	5%	5%	9%	11%
Oppose paying more to water companies when so much water is lost in leakage	2%	0%	0%	0%
Other	1%	1%	0%	0%
Don't know/can't say	2%	1%	4%	3%
TOTAL	100%	100%	100%	100%
No of respondents	95	106	85	73

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS ACCEPTABLE?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
I value the improvements	15%	37%	33%	22%
Improvements are worth the money	33%	25%	10%	4%
Plan is affordable	38%	29%	51%	69%
Have no choice but to pay	1%	0%	0%	0%
Other	0%	0%	1%	0%
Don't know/can't say	14%	9%	5%	5%
TOTAL	100%	100%	100%	100%
No of respondents	186	123	168	157

Q28a. VALUE FOR MONEY OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	6%	3%	2%	2%
Fairly poor value for money	7%	17%	15%	12%
Neither poor nor good value for money	27%	33%	25%	27%
Fairly good value for money	43%	37%	33%	34%
Very good value for money	15%	9%	24%	24%
Don't know/can't say	1%	2%	1%	2%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Ensure a reliable and continuous sewerage service for the removal and treatment of sewage

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	6%	2%	3%	*%
Fairly poor value for money	6%	13%	13%	12%
Neither poor nor good value for money	20%	33%	21%	20%
Fairly good value for money	48%	37%	37%	41%
Very good value for money	17%	12%	25%	25%
Don't know/can't say	2%	3%	1%	1%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Avoid risk of homes being flooded with sewage

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	6%	3%	3%	*%
Fairly poor value for money	6%	13%	15%	12%
Neither poor nor good value for money	22%	32%	19%	23%
Fairly good value for money	48%	37%	38%	41%
Very good value for money	18%	13%	24%	24%
Don't know/can't say	0%	2%	1%	0%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Avoid risk of properties being flooded with sewage outside the home

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	6%	2%	2%	*%
Fairly poor value for money	8%	15%	15%	12%
Neither poor nor good value for money	20%	33%	22%	24%
Fairly good value for money	48%	35%	37%	40%
Very good value for money	18%	11%	24%	23%
Don't know/can't say	*%	4%	1%	1%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	7%	3%	3%	*%
Fairly poor value for money	6%	14%	15%	14%
Neither poor nor good value for money	26%	33%	22%	27%
Fairly good value for money	43%	36%	37%	35%
Very good value for money	17%	11%	21%	23%
Don't know/can't say	2%	3%	2%	1%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	6%	4%	2%	*%
Fairly poor value for money	6%	13%	13%	12%
Neither poor nor good value for money	18%	35%	23%	23%
Fairly good value for money	49%	36%	40%	40%
Very good value for money	20%	11%	22%	24%
Don't know/can't say	2%	2%	0%	1%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.54	3.34	3.62	3.67
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.67	3.45	3.68	3.78
Avoid risk of homes being flooded with sewage	3.67	3.44	3.68	3.75
Avoid risk of properties being flooded with sewage outside the home	3.64	3.40	3.66	3.73
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.59	3.40	3.59	3.67
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.72	3.39	3.68	3.75
No of respondents	300	254	260	250

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Very poor value for money	8%	2%	7%	1%
Fairly poor value for money	13%	24%	20%	22%
Neither poor nor good value for money	38%	39%	20%	34%
Fairly good value for money	34%	29%	35%	41%
Very good value for money	6%	4%	18%	3%
Don't know/can't say	1%	2%	0%	0%
TOTAL	100%	100%	100%	100%
No of respondents	300	254	260	250

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Anglian Water	Cambridge Water	Essex & Suffolk Water	Tendring Hundred Water
Total sewerage bill by 2014-15	3.17	3.08	3.37	3.24
No of respondents	300	254	260	250

1. Key Findings

Bournemouth & West Hampshire Water is a water company billing 177,000 properties for water services. Sewerage services for Bournemouth & West Hampshire Water are provided by Southern Water/Wessex Water.

Uninformed Views of Current and Future Services

80% of customers stated that they were **satisfied** with the services provided by Bournemouth & West Hampshire Water, whereas 6% of customers indicated that they were dissatisfied. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (53%), there were no problems with the service (24%) and that the water was good quality/clean (13%). The main reasons that customers were dissatisfied were it was too expensive already (30%), prices were always increasing (20%) and it was a poor/unreliable service (20%).

59% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (47%) the service was worth the money (31%) and they valued the service (21%). 19% of customers stated that the current water and sewerage service was poor value for money, the main reasons being that it was too expensive already (58%), it was not worth the money (16%) and they opposed paying so much to companies who make large profits (11%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Bournemouth & West Hampshire Water and Southern Water/Wessex Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 61% felt that the overall company plan was **acceptable**, 30% felt that it was **unacceptable**, and 9% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

55% of customers stated that the current water service was **good value for money**, 55% stated the current sewerage service (provided by Southern Water/Wessex Water) was good value for money, 55% felt that their current service overall was good value for money. Reasons that overall the current service offers good value for money were that the bill was affordable (44%), service was worth the money (36%) and they valued the service (17%).

17% of customers stated that the current water service was **poor value for money**, 20% stated the current sewerage service was poor value for money, and 17% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (58%) and it was not worth the money (24%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.51 for **water** services, 3.47 for **sewerage** services, and 3.46 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Bournemouth & West Hampshire Water's water and Southern Water's / Wessex Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

64% of customers felt that Bournemouth & West Hampshire Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (64%), the improvements are worth the money (21%) and they valued the improvements (10%).

28% of customers felt that Bournemouth & West Hampshire Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (73%) and that the improvements are not worth the money (13%).

63% of customers felt that Southern Water's / Wessex Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (65%), the improvements are worth the money (19%) and they valued the improvements (11%).

29% of customers felt that Southern Water's/Wessex Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (64%) and that the improvements are not worth the money (18%).

61% of customers felt that Bournemouth & West Hampshire Water's and Southern Water's/Wessex Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (65%), the improvements are worth the money (18%) and they valued the improvements (12%).

29% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (69%) and that the improvements are not worth the money (17%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.57 for Bournemouth & West Hampshire Water's **water** services, 3.56 for Southern Water's/Wessex Water's **sewerage** services, and 3.47 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 60% (water service), 57% (sewerage) and 55% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 19% (water service), 20% (sewerage service) and 22% (service overall).

Timing

60% of Bournemouth & West Hampshire Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period.

2. Introduction

The attitudes and preferences of Bournemouth & West Hampshire customers, reported in section 3, are based on a sample of 293. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	91%	100%	90%	92%	84%	93%	93%	95%	87%	92%	84%	97%	88%	94%	98%	88%	86%	85%	88%	91%
Transport	90%	95%	90%	91%	85%	91%	93%	93%	86%	94%	79%	96%	89%	96%	94%	81%	89%	89%	82%	92%
Health Services	92%	89%	94%	91%	89%	94%	93%	96%	86%	96%	88%	99%	90%	93%	98%	91%	89%	89%	90%	92%
Crime Prevention	91%	89%	87%	95%	87%	92%	93%	95%	89%	89%	94%	95%	86%	92%	97%	93%	89%	84%	94%	90%
Environment	92%	89%	94%	92%	86%	96%	92%	94%	89%	96%	81%	100%	92%	91%	95%	95%	89%	92%	92%	92%
Cost of Living	94%	100%	92%	95%	90%	95%	96%	98%	90%	96%	94%	97%	91%	96%	98%	98%	90%	89%	90%	95%
Immigration	72%	76%	66%	77%	70%	72%	76%	74%	74%	69%	76%	71%	71%	79%	78%	61%	65%	76%	63%	74%
Water and Sewerage Services	92%	89%	94%	93%	85%	98%	89%	93%	90%	94%	92%	96%	91%	89%	98%	93%	89%	90%	88%	93%
Utility Services	91%	94%	88%	94%	87%	93%	93%	93%	90%	90%	94%	95%	88%	93%	95%	93%	90%	84%	92%	91%
TOTAL	90%	92%	88%	91%	85%	92%	91%	92%	87%	91%	87%	94%	87%	92%	95%	88%	86%	86%	87%	90%
No of respondents	285	19	127	125	80	126	75	79	121	85	45	79	132	54	64	43	63	61	50	235

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	23%	26%	32%	15%	32%	24%	13%	19%	20%	32%	17%	15%	32%	20%	11%	21%	41%	21%	19%	24%
Improving air quality	39%	21%	34%	49%	27%	41%	47%	40%	46%	26%	40%	43%	38%	48%	54%	35%	25%	30%	45%	37%
Reducing climate change	31%	47%	34%	27%	41%	32%	20%	25%	33%	33%	31%	32%	30%	30%	26%	30%	38%	29%	34%	30%
More activity on nature conservation etc.	28%	37%	28%	26%	27%	29%	28%	28%	28%	29%	25%	31%	26%	18%	25%	35%	35%	30%	19%	30%
Reducing litter and household waste	26%	26%	25%	27%	27%	22%	30%	21%	25%	31%	38%	20%	23%	32%	23%	21%	24%	27%	30%	25%
Improvements to tackling flooding	27%	16%	25%	33%	22%	29%	32%	31%	29%	21%	25%	28%	28%	30%	35%	35%	17%	21%	26%	28%
Encouraging people to use less water	17%	16%	17%	16%	20%	15%	17%	18%	12%	22%	21%	12%	19%	18%	20%	12%	19%	14%	17%	17%
No of respondents	293	19	128	128	82	129	76	85	123	85	48	81	134	56	65	43	63	66	53	240

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	69%	74%	77%	63%	85%	64%	63%	61%	71%	75%	69%	65%	74%	71%	57%	70%	84%	65%	70%	69%
Removal and treatment of waste water	70%	63%	83%	61%	80%	70%	61%	58%	72%	80%	67%	65%	78%	70%	62%	74%	78%	68%	68%	70%
Dealing with sewer flooding	61%	47%	66%	61%	68%	60%	59%	65%	63%	56%	63%	62%	66%	68%	57%	65%	63%	56%	60%	62%
Maintaining pipes, treatment works, and other infrastructure	65%	63%	68%	63%	78%	62%	57%	66%	65%	62%	67%	67%	66%	61%	58%	58%	79%	64%	64%	65%
Protecting the water environment	59%	47%	67%	55%	67%	59%	51%	55%	65%	54%	60%	64%	60%	59%	52%	65%	68%	53%	62%	58%
Managing water pollution from agriculture and manufacturing	56%	32%	59%	59%	61%	53%	57%	51%	62%	54%	65%	53%	58%	63%	51%	56%	62%	52%	60%	55%
Drainage of roads	56%	37%	54%	63%	55%	57%	58%	66%	55%	48%	69%	57%	53%	70%	55%	56%	56%	47%	64%	55%
Reducing litter in waterways	52%	42%	49%	56%	56%	49%	54%	53%	56%	45%	52%	52%	53%	64%	54%	49%	46%	47%	58%	50%
Preventing flooding from rivers	52%	21%	51%	58%	51%	53%	50%	48%	59%	44%	60%	42%	60%	57%	48%	53%	49%	52%	66%	48%
Managing canal systems	46%	37%	48%	45%	48%	43%	49%	47%	50%	40%	40%	37%	55%	61%	35%	49%	48%	41%	58%	43%
Helping to reduce greenhouse gas emissions and tackle climate change	45%	26%	46%	47%	51%	43%	41%	44%	45%	46%	52%	31%	54%	50%	51%	37%	46%	38%	55%	43%
No of respondents	293	19	128	128	82	129	76	85	123	85	48	81	134	56	65	43	63	66	53	240

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 20 years
	Ensure the safety of tap water - drinking water quality	99.99% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 331 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	No properties at risk of low water pressure at the tap. Supplies to 2 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.9% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 0 sites suffer from (or at risk of) low water levels caused by abstraction of water
	CURRENT AVERAGE WATER BILL = £131	

Southern Water

SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	251 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	2,841 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
	CURRENT AVERAGE SEWERAGE BILL = £222	
	CURRENT AVERAGE TOTAL BILL = £353	

SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	343 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	688 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	140km of river of poor/bad quality, 1,780km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £189
	CURRENT AVERAGE TOTAL BILL = £320	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	4%	5%	2%	5%	4%	5%	1%	5%	7%	1%	0%	9%	4%	4%	2%	7%	2%	9%	4%	5%
Fairly poor value for money	13%	5%	13%	15%	18%	12%	11%	8%	16%	14%	19%	12%	15%	7%	14%	19%	10%	18%	13%	13%
Neither poor nor good value for money	20%	16%	22%	18%	18%	16%	28%	20%	21%	18%	21%	20%	22%	20%	22%	16%	19%	21%	19%	20%
Fairly good value for money	41%	47%	45%	38%	40%	42%	43%	41%	35%	51%	29%	47%	40%	43%	40%	35%	51%	36%	38%	42%
Very good value for money	14%	5%	10%	20%	12%	19%	8%	15%	16%	9%	29%	10%	13%	14%	22%	12%	14%	8%	21%	13%
Don't know/can't say	7%	21%	8%	4%	7%	6%	9%	11%	5%	7%	2%	2%	7%	13%	2%	12%	5%	8%	6%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	293	19	128	128	82	129	76	85	123	85	48	81	134	56	65	43	63	66	53	240

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.51	3.53	3.53	3.57	3.42	3.61	3.51	3.61	3.40	3.57	3.70	3.38	3.46	3.65	3.67	3.29	3.70	3.16	3.62	3.48
No of respondents	293	19	128	128	82	129	76	85	123	85	48	81	134	56	65	43	63	66	53	240

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£16
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 20 years	Maintain current service	£4
	99.99% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£1
	Approximately 331 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0
	No properties at risk of low water pressure at the tap. Supplies to 2 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain at 0 the number of properties at risk of low water pressure. 5 properties affected by unplanned interruptions	£0
	99.9% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	2 assets better protected from severe weather safeguarding service for 127,000 people	£2
	Fish and wildlife at 0 sites suffer from (or at risk of) low water levels caused by abstraction of water	Maintain current service	£0
WATER BILL - FROM £125 IN 2010 TO £147 IN 2014/5			£22

Southern Water

SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	£23	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£0	
	251 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 141 properties at risk of internal flooding from sewers at least once in ten years	£6	
	2,841 areas at risk of external flooding from sewers at least once in ten years	4,560 areas at risk of external flooding from sewers at least once in ten years	£2	
	Sewerage system could occasionally be disrupted e.g. by extreme events	Maintain current service	£0	
	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 290km of river can better support fish and 320km can better support other wildlife: plus 1 wetland and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£33	
	SEWERAGE BILL - FROM £230 IN 2010 TO £281 IN 2014/5			£50
	TOTAL COMBINED BILL - FROM £355 IN 2010 TO £428 BY 2014/5			£72

SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	-£25
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£6
	343 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 134 properties at risk of internal flooding from sewers at least once in ten years	£1
	688 areas at risk of external flooding from sewers at least once in ten years	1,707 areas at risk of external flooding from sewers at least once in ten years	£1
	Sewerage system could occasionally be disrupted e.g. by extreme events	100 assets better protected from severe weather safeguarding service	<50p
	140km of river of poor/bad quality, 1,780km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 40km of river can better support fish and 170km can better support other wildlife: plus 0 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£13
	SEWERAGE BILL - FROM £194 IN 2010 TO £190 IN 2014/5		-£4
TOTAL COMBINED BILL - FROM £319 IN 2010 TO £337 BY 2014/5		£18	

Q19. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN FOR WATER SERVICES AND THE IMPACTS ON YOUR WATER BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	10%	16%	4%	14%	6%	9%	12%	13%	13%	2%	8%	17%	7%	20%	6%	5%	3%	15%	9%	10%
Unacceptable	18%	16%	21%	15%	24%	16%	17%	12%	23%	19%	21%	14%	24%	11%	14%	23%	25%	20%	15%	19%
Acceptable	54%	47%	58%	56%	55%	59%	47%	52%	54%	54%	60%	59%	48%	41%	57%	65%	56%	52%	62%	52%
Very acceptable	10%	0%	7%	14%	7%	11%	11%	15%	7%	11%	10%	6%	13%	16%	20%	5%	6%	3%	9%	10%
Don't know/can't say	8%	21%	10%	1%	7%	5%	13%	8%	3%	14%	0%	4%	9%	13%	3%	2%	10%	11%	4%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	293	19	128	128	82	129	76	85	123	85	48	81	134	56	65	43	63	66	53	240

Q20. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	1%	0%	3%	0%	0%	3%	0%	0%	2%	0%	0%	2%	0%	0%	0%	0%	4%	8%	0%	
Improvements not worth the money	13%	17%	16%	11%	12%	12%	18%	19%	9%	17%	7%	8%	17%	29%	15%	0%	11%	9%	8%	14%
Too expensive already	73%	67%	63%	81%	72%	67%	82%	71%	77%	67%	79%	72%	73%	71%	69%	92%	61%	78%	69%	74%
Cannot afford it	7%	0%	9%	8%	8%	12%	0%	5%	9%	6%	14%	8%	5%	0%	8%	8%	11%	9%	15%	6%
Oppose paying more for a natural resource	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Oppose paying more to companies who make large profits	4%	17%	6%	0%	8%	3%	0%	5%	2%	6%	0%	12%	0%	0%	8%	0%	11%	0%	0%	4%
Oppose paying more to water companies when so much water is lost in leakage	1%	0%	3%	0%	0%	3%	0%	0%	0%	6%	0%	0%	2%	0%	0%	0%	6%	0%	0%	1%
This should be done as a matter of course	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	83	6	32	37	25	33	22	21	44	18	14	25	41	17	13	12	18	23	13	70

Q21. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	10%	11%	19%	1%	16%	10%	2%	4%	12%	13%	3%	8%	12%	0%	2%	13%	26%	8%	18%	7%
Improvements are worth the money	21%	22%	23%	21%	20%	19%	27%	19%	19%	27%	18%	26%	19%	31%	24%	17%	15%	19%	21%	21%
Plan is affordable	64%	67%	49%	74%	57%	66%	68%	75%	63%	53%	79%	57%	63%	69%	72%	67%	49%	61%	50%	67%
Everything/Prices are going up	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Have no choice but to pay	1%	0%	1%	1%	2%	1%	0%	0%	3%	0%	0%	0%	2%	0%	0%	0%	3%	3%	3%	1%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	4%	0%	7%	2%	6%	4%	2%	2%	4%	7%	0%	9%	4%	0%	2%	3%	8%	8%	8%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	187	9	83	90	51	90	44	57	75	55	34	53	81	32	50	30	39	36	38	149

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	12%	22%	21%	5%	21%	10%	5%	7%	12%	19%	9%	9%	14%	6%	4%	11%	27%	15%	14%	12%
Improvements are worth the money	18%	0%	23%	13%	23%	16%	17%	14%	19%	21%	15%	23%	19%	13%	21%	21%	19%	15%	14%	19%
Plan is affordable	65%	78%	49%	79%	50%	70%	71%	75%	64%	54%	76%	60%	62%	75%	75%	68%	46%	58%	62%	65%
Other	1%	0%	1%	1%	2%	1%	0%	0%	3%	0%	0%	0%	3%	0%	0%	0%	3%	3%	3%	1%
Don't know/can't say	4%	0%	5%	2%	4%	2%	7%	4%	3%	6%	0%	9%	3%	6%	0%	0%	5%	9%	8%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	178	9	77	87	48	86	42	57	69	52	34	47	78	32	48	28	37	33	37	141

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	5%	9%	14%	30%	33%	9%	293
Ensure a reliable and continuous water supply	5%	7%	19%	38%	25%	6%	293
Ensure the safety of tap water – drinking water quality	5%	10%	18%	39%	22%	6%	293
Manage the appearance, taste and smell of tap water	5%	10%	17%	37%	26%	6%	293
Manage the pressure of water in your taps and the number of unplanned interruptions	7%	12%	13%	42%	21%	6%	293
Handle customers' accounts, queries, complaints and customers with special needs	6%	10%	17%	42%	20%	5%	293
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	8%	13%	27%	32%	14%	6%	293
Manage the amount of water taken from the environment to supply customers	5%	9%	19%	42%	19%	5%	293
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	9%	7%	26%	33%	18%	6%	293
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	6%	12%	15%	39%	24%	5%	293
Avoid risk of homes being flooded with sewage	5%	11%	19%	38%	23%	4%	293
Avoid risk of properties being flooded with sewage outside the home	6%	9%	22%	34%	23%	6%	293
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	7%	11%	25%	34%	18%	5%	293
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	4%	11%	18%	38%	23%	6%	293
TOTAL	6%	10%	19%	37%	22%	6%	293

Q29. ARE THERE ANY OTHER CHANGES TO THE COMPANY PLAN THAT YOU WOULD LIKE TO SEE MADE THAT HAVE NOT BEEN COVERED?

	Total
Reduce prices / charges	2%
Improve water appearance / colour / quality / taste	0%
Quicker response times	0%
Reduce number of leakages / increase repairs to pipes	0%
Improve the sewage system	0%
Generally take more responsibility	0%
Install water meters nationally	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Improve the water pressure	0%
Deal with the drainage problems/ flooding problems	0%
Give the option to install a water meter	0%
Be responsible for repairs to all pipes	0%
Have a fairer pricing / water charging scheme	1%
Increase in charges should be linked to improvements	0%
Service should be nationalized	0%
Improve water saving methods	0%
Water is too chalky / hard water / lime scale problems	0%
Improve level of service / customer service / customer information	0%
Protect nature / wildlife / environment	0%
Reduce money wastage (unspecified source)	1%
More frequent meter readings	0%
Plan should already be in action / already doing things like this	0%
Other	1%
None	94%
Don't know	0%
Refused	0%
No of respondents	293

**Please note: multiple responses were allowed in this question. Percentages show number of respondents giving an answer.

Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

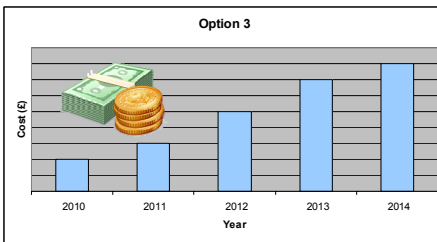
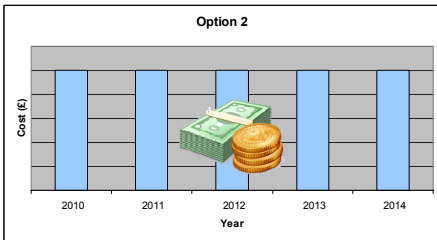
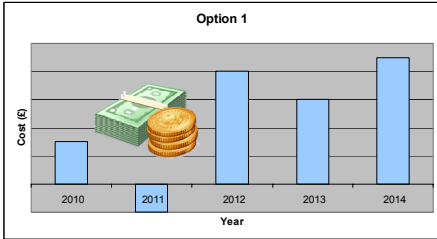
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	12%	5%	13%	11%	20%	12%	5%	8%	15%	12%	19%	11%	12%	9%	3%	7%	19%	20%	21%	10%
Ensure a reliable and continuous water supply	55%	53%	54%	54%	61%	53%	50%	52%	59%	51%	67%	54%	56%	50%	46%	56%	63%	58%	57%	54%
Ensure the safety of tap water - drinking water quality	56%	58%	56%	59%	59%	59%	49%	59%	54%	55%	69%	53%	57%	55%	57%	53%	62%	50%	62%	54%
Manage the appearance, taste and smell of tap water	43%	32%	38%	49%	39%	41%	53%	44%	45%	40%	48%	37%	41%	46%	58%	44%	29%	38%	38%	44%
Manage the pressure of water in your taps and the number of unplanned interruptions	23%	16%	24%	24%	22%	20%	29%	25%	22%	22%	33%	15%	22%	34%	20%	26%	19%	18%	21%	23%
Handle customers' accounts, queries, complaints and customers with special needs	31%	21%	26%	38%	21%	30%	43%	39%	30%	25%	21%	37%	33%	43%	42%	33%	21%	20%	25%	33%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	16%	16%	12%	20%	15%	14%	21%	19%	17%	12%	13%	12%	17%	13%	23%	19%	13%	14%	21%	15%
Manage the amount of water taken from the environment to supply customers	5%	5%	5%	5%	4%	6%	5%	4%	9%	2%	4%	5%	5%	7%	8%	2%	3%	6%	8%	5%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	5%	10%	3%	6%	5%	8%	4%	5%	11%	2%	7%	7%	9%	3%	2%	10%	6%	0%	8%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	8%	11%	12%	5%	10%	11%	1%	6%	8%	9%	6%	10%	7%	4%	8%	12%	14%	3%	11%	7%
Avoid risk of homes being flooded with sewage	4%	11%	6%	2%	10%	2%	1%	1%	3%	8%	2%	6%	4%	0%	2%	2%	14%	2%	4%	4%
Avoid risk of properties being flooded with sewage outside the home	2%	0%	4%	2%	4%	3%	0%	2%	2%	2%	2%	5%	1%	4%	2%	0%	3%	3%	2%	3%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	0%	1%	2%	0%	2%	1%	0%	2%	1%	0%	1%	1%	0%	2%	2%	0%	2%	2%	1%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	5%	5%	0%	5%	2%	0%	1%	2%	4%	0%	5%	2%	0%	2%	0%	10%	0%	0%	3%
No of respondents	293	19	128	128	82	129	76	85	123	85	48	81	134	56	65	43	63	66	53	240

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	12%	11%	8%	18%	7%	10%	22%	15%	13%	8%	19%	14%	10%	20%	14%	19%	6%	6%	17%	11%
Bills show one big change in first year, then stay the same for the following four years	28%	32%	28%	28%	30%	25%	32%	28%	28%	26%	40%	17%	28%	30%	29%	28%	27%	24%	32%	27%
Bills change steadily every year, so that customers do not see big changes from year to year	60%	58%	64%	54%	62%	65%	46%	56%	59%	66%	42%	69%	63%	50%	57%	53%	67%	70%	51%	62%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	293	19	128	128	82	129	76	85	123	85	48	81	134	56	65	43	63	66	53	240



3.6 Other Company Information

GENDER

	Total
Male	47%
Female	53%
No of respondents	293

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	51%
Jointly responsible for household finances along with spouse/partner	39%
Contributor to shared household expenses (e.g. house/flatmate, parents)	4%
Payment through private rent	5%
Payment through Council rent/social housing	1%
Other	0%
Refused	0%
No of respondents	293

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	34%
Employed Part-time (9-29 hours)	10%
Retired	41%
Not working and not looking for work	8%
Student	3%
Not working and looking for work	2%
Other	0%
Refused	2%
No of respondents	293

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	1%
B	4%
C	11%
D	22%
E	8%
F	4%
G	1%
H	0%
Don't know	48%
No of respondents	293

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	0%
Don't increase / should reduce charges	1%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	0%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	0%
None	88%
Don't know	10%
Refused	0%
No of respondents	293

**Please note: multiple responses were allowed in this question
Bournemouth and West Hampshire

1. Key Findings

Bristol Water is a water company billing 448,400 properties for water services. Sewerage services for Bristol Water are provided by Wessex Water.

Uninformed Views of Current and Future Services

92% of customers stated that they were **satisfied** with the services provided by Bristol Water, whereas 3% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were there were no problems (57%), and that the water was good quality/clean (27%). The main reason that customers were dissatisfied was that there was a poor/unreliable water service (50%).

37% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that they valued the service (56%) and the service was worth the money (31%). 45% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (87%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Bristol Water and Wessex Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 24% felt that the overall company plan was **acceptable**, 70% felt that it was **unacceptable**, and 6% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

36% of customers stated that the current water service was **good value for money**, 37% stated the current sewerage service (provided by Wessex Water) was good value for money, and 35% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that they valued the service (46%) and the service was worth the money (44%).

32% of customers stated that the current water service was **poor value for money**, 30% stated the current sewerage service was poor value for money, and 33% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (79%), they cannot afford it (11%) and it was not worth the money (7%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.04 for **water** services, 3.10 for **sewerage** services, and 3.04 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Bristol Water's water and Wessex Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

26% of customers felt that Bristol Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the improvements are worth the money (38%), they valued the improvements and that the plan is affordable (25%).

71% of customers felt that Bristol Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (72%), they cannot afford it (11%) and that the improvements are not worth the money (10%).

45% of customers felt that Wessex Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (48%) the improvements are worth the money (27%), and they valued the improvements (23%).

49% of customers felt that Wessex Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (70%), they cannot afford it (14%) and that the improvements are not worth the money (13%).

26% of customers felt that Bristol Water's and Wessex Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (39%), the improvements are worth the money (38%) and I valued the improvements (21%).

70% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (71%), they cannot afford it (13%) and that the improvements are not worth the money (9%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 2.66 for Bristol Water's **water** services, 3.08 for Wessex Water's **sewerage** services, and 2.58 for services **overall**.

The proportion of customers rating the proposed DBP services as good value for money were 26% (water service), 36% (sewerage) and 23% (service overall). The proportion of customers rating the proposed DBP services as poor value for money were 51% (water service), 34% (sewerage service) and 57% (service overall).

Timing

91% of Bristol Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

2. Introduction

The attitudes and preferences of Bristol Water customers, reported in section 3, are based on a sample of 277. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis.

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	92%	98%	96%	85%	92%	89%	97%	87%	90%	98%	87%	100%	92%	84%	97%	97%	98%	92%	95%	92%
Transport	97%	98%	98%	97%	97%	97%	99%	97%	97%	98%	97%	97%	98%	99%	97%	100%	98%	94%	98%	97%
Health Services	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Crime Prevention	99%	98%	100%	98%	98%	100%	97%	98%	99%	99%	97%	100%	99%	99%	97%	100%	100%	100%	98%	99%
Environment	99%	100%	100%	97%	100%	98%	100%	95%	100%	100%	97%	100%	99%	96%	100%	100%	100%	100%	100%	99%
Cost of Living	99%	100%	100%	97%	98%	98%	100%	97%	99%	100%	90%	100%	100%	98%	98%	100%	100%	100%	100%	99%
Immigration	84%	87%	89%	77%	79%	81%	92%	87%	80%	87%	84%	81%	84%	79%	81%	91%	94%	82%	88%	83%
Water and Sewerage Services	98%	98%	98%	97%	98%	97%	99%	95%	98%	99%	97%	100%	98%	96%	100%	100%	98%	96%	100%	97%
Utility Services	99%	96%	99%	100%	100%	99%	97%	98%	98%	100%	100%	100%	99%	98%	98%	100%	100%	100%	100%	99%
TOTAL	96%	97%	98%	94%	96%	96%	98%	95%	96%	98%	94%	98%	96%	94%	97%	99%	99%	96%	98%	96%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	43%	44%	46%	37%	33%	47%	43%	38%	38%	50%	32%	19%	47%	48%	38%	45%	51%	31%	32%	44%
Improving air quality	39%	33%	40%	39%	24%	41%	47%	46%	36%	37%	48%	9%	41%	41%	45%	39%	35%	29%	37%	39%
Reducing climate change	28%	36%	30%	21%	38%	22%	32%	26%	27%	30%	23%	28%	29%	26%	30%	30%	22%	31%	29%	28%
More activity on nature conservation etc	13%	7%	14%	14%	13%	14%	12%	18%	14%	9%	19%	16%	12%	19%	9%	18%	14%	4%	10%	14%
Reducing litter and household waste	29%	29%	23%	35%	37%	25%	26%	30%	30%	26%	32%	56%	23%	25%	30%	27%	22%	39%	39%	27%
Improvements to tackling flooding	16%	16%	9%	26%	24%	17%	9%	10%	27%	9%	29%	9%	16%	19%	16%	12%	14%	18%	17%	16%
Encouraging people to use less water	32%	36%	35%	26%	30%	32%	30%	31%	28%	36%	16%	59%	29%	23%	31%	21%	39%	47%	32%	32%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	83%	82%	80%	88%	84%	83%	81%	82%	83%	83%	84%	75%	84%	81%	88%	67%	80%	94%	78%	84%
Removal and treatment of waste water	69%	67%	69%	70%	63%	69%	73%	70%	65%	72%	74%	63%	70%	70%	77%	58%	59%	75%	61%	70%
Dealing with sewer flooding	43%	49%	44%	38%	44%	46%	36%	41%	38%	50%	42%	44%	44%	41%	44%	39%	37%	53%	41%	43%
Maintaining pipes, treatment works, and other infrastructure	59%	51%	68%	51%	60%	67%	45%	57%	50%	69%	52%	66%	60%	46%	61%	58%	65%	73%	49%	61%
Protecting the water environment	45%	33%	50%	44%	54%	47%	31%	48%	39%	50%	35%	50%	47%	29%	50%	39%	49%	65%	39%	46%
Managing water pollution from agriculture and manufacturing	24%	24%	26%	21%	38%	22%	16%	10%	27%	30%	10%	38%	24%	15%	19%	30%	35%	31%	22%	25%
Drainage of roads	26%	29%	27%	24%	35%	27%	18%	20%	29%	27%	19%	31%	27%	30%	23%	24%	24%	27%	15%	28%
Reducing litter in waterways	35%	38%	34%	34%	38%	32%	36%	33%	32%	38%	39%	47%	31%	31%	38%	24%	33%	45%	32%	35%
Preventing flooding from rivers	27%	18%	29%	29%	24%	26%	31%	20%	29%	30%	23%	25%	27%	28%	31%	9%	18%	43%	22%	28%
Managing canal systems	14%	18%	15%	11%	16%	14%	15%	11%	11%	19%	6%	19%	13%	13%	14%	18%	10%	18%	17%	14%
Helping to reduce greenhouse gas emissions and tackle climate change	22%	13%	23%	25%	25%	22%	22%	16%	24%	23%	26%	19%	21%	20%	20%	15%	33%	22%	20%	22%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

3.2 Their Company - Uninformed

Q4. WHICH OF THE SERVICES PROVIDED BY YOUR WATER & SEWERAGE COMPANY DO YOU FEEL ARE MOST IMPORTANT?

(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	86%	80%	89%	86%	90%	86%	84%	75%	89%	90%	87%	88%	88%	85%	86%	85%	80%	96%	85%	86%
Removal and treatment of waste water	51%	47%	50%	55%	57%	50%	49%	51%	54%	48%	48%	34%	56%	49%	53%	52%	43%	59%	44%	52%
Dealing with sewer flooding	27%	16%	29%	29%	22%	30%	26%	31%	27%	25%	26%	31%	27%	31%	30%	15%	29%	24%	20%	28%
Maintaining pipes, treatment works, and other infrastructure	51%	64%	49%	47%	59%	53%	45%	46%	50%	54%	29%	50%	54%	45%	53%	48%	59%	51%	39%	53%
Protecting the water environment	16%	20%	15%	15%	16%	14%	18%	15%	17%	16%	16%	9%	16%	15%	14%	27%	16%	12%	22%	15%
Drainage of roads	8%	16%	8%	5%	3%	11%	9%	10%	8%	7%	3%	6%	9%	11%	8%	12%	8%	2%	5%	9%
Dealing with customer complaints & enquiries	29%	31%	30%	26%	21%	31%	28%	26%	23%	36%	26%	38%	26%	24%	27%	24%	37%	35%	29%	29%
Helping to reduce greenhouse gas emissions & tackle climate change	16%	18%	14%	17%	11%	14%	26%	20%	15%	15%	32%	6%	15%	21%	20%	15%	6%	12%	29%	14%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q5. HOW SATISFIED OR DISSATISFIED ARE YOU WITH THE WATER AND SEWERAGE SERVICE YOU RECEIVE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very dissatisfied	1%	0%	1%	1%	0%	1%	1%	2%	1%	0%	0%	0%	1%	3%	0%	0%	0%	0%	0%	1%
Fairly dissatisfied	2%	2%	2%	2%	0%	2%	4%	0%	3%	3%	0%	0%	2%	3%	5%	0%	0%	2%	2%	2%
Neither satisfied nor dissatisfied	5%	7%	7%	3%	2%	8%	4%	7%	3%	7%	0%	3%	6%	3%	8%	9%	2%	8%	5%	6%
Fairly satisfied	76%	71%	73%	83%	76%	73%	80%	80%	81%	69%	87%	78%	74%	78%	72%	79%	80%	75%	63%	78%
Very satisfied	16%	20%	17%	11%	22%	16%	11%	11%	13%	21%	13%	19%	16%	15%	16%	12%	18%	16%	29%	13%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q5a. WHAT IS THE MAIN REASON YOU ARE DISSATISFIED?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Too expensive already	13%	0%	25%	0%	0%	25%	0%	0%	0%	33%	0%	0%	14%	0%	33%	0%	0%	0%	0%	14%
Prices always increasing	13%	0%	25%	0%	0%	0%	25%	100%	0%	0%	0%	0%	14%	25%	0%	0%	0%	0%	0%	14%
Poor / unreliable - unspecified	13%	100%	0%	0%	0%	25%	0%	0%	0%	33%	0%	0%	0%	0%	0%	0%	0%	100%	0%	14%
Poor / unreliable - water	50%	0%	25%	100%	0%	25%	75%	0%	75%	33%	0%	0%	57%	50%	67%	0%	0%	0%	100%	43%
Poor / unreliable - sewerage	13%	0%	25%	0%	0%	25%	0%	0%	25%	0%	0%	14%	25%	0%	0%	0%	0%	0%	0%	14%
Poor water pressure	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Too many incidents of flooding / drainage problems	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	0%	0%	100%	100%	100%	0%	0%	100%	100%	100%
No of respondents	8	1	4	3	0	4	4	1	4	3	0	0	7	4	3	0	0	1	1	7

Q5b. WHAT IS THE MAIN REASON YOU ARE SATISFIED?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Good / reliable service / no interruptions	1%	0%	2%	1%	2%	2%	0%	2%	1%	1%	6%	0%	1%	1%	0%	0%	2%	2%	3%	1%
Good value for money	4%	7%	6%	0%	8%	4%	0%	4%	1%	7%	0%	0%	3%	0%	0%	17%	10%	0%	0%	5%
Water is good quality / clean	27%	27%	23%	31%	13%	22%	49%	29%	33%	19%	39%	19%	27%	38%	29%	30%	21%	11%	29%	26%
No flooding	7%	7%	8%	8%	13%	7%	4%	5%	6%	10%	3%	6%	9%	7%	9%	7%	6%	9%	11%	7%
No problems - unspecified	57%	56%	57%	57%	56%	61%	46%	61%	54%	57%	52%	71%	56%	51%	61%	40%	56%	72%	50%	58%
No problems - water	3%	0%	3%	3%	6%	3%	0%	0%	3%	4%	0%	3%	3%	1%	2%	3%	4%	4%	8%	2%
No problems - sewerage	1%	2%	2%	0%	2%	2%	0%	0%	2%	1%	0%	0%	2%	1%	0%	3%	0%	2%	0%	1%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	41	120	93	62	118	67	56	102	96	31	31	181	74	56	30	48	46	38	216

Q6. HOW DO YOU PAY FOR YOUR WATER AND SEWERAGE SERVICE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Water and sewerage services combined in 1 bill	92%	93%	89%	95%	95%	89%	93%	97%	92%	90%	100%	91%	92%	96%	88%	94%	88%	94%	98%	91%
Water and sewerage services in 2 separate bills	3%	0%	3%	4%	0%	5%	1%	0%	6%	2%	0%	3%	3%	0%	6%	3%	6%	0%	0%	3%
Don't know	5%	7%	8%	1%	5%	5%	5%	3%	3%	8%	0%	6%	4%	4%	6%	3%	6%	6%	2%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q12. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR APPROACH TO PAYING YOUR BILL/S?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't find it difficult to pay on time	85%	84%	86%	85%	92%	83%	83%	81%	89%	84%	90%	90%	84%	69%	84%	94%	96%	96%	90%	84%
I usually pay on time, but it can be difficult	12%	9%	11%	14%	8%	14%	13%	15%	10%	11%	10%	3%	14%	23%	13%	6%	4%	4%	10%	12%
I sometimes pay late depending on what other bills I have to pay	1%	2%	2%	1%	0%	2%	3%	0%	1%	3%	0%	3%	2%	4%	2%	0%	0%	0%	0%	2%
I often find it a challenge and have to delay payments as long as possible	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't usually pay my bills on time	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	1%	5%	2%	0%	0%	2%	1%	3%	0%	2%	0%	3%	1%	4%	2%	0%	0%	0%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	272	43	132	97	61	132	72	59	108	105	31	31	197	77	63	33	48	51	40	232

Please note this question was only asked to sole/joint responsibility bill payers.

Q13. HAVE YOU/HOUSEHOLD MEMBER CONTACTED YOUR WATER AND SEWERAGE COMPANY OTHER THAN TO PAY THE BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	6%	7%	5%	7%	6%	5%	4%	7%	8%	3%	10%	6%	5%	4%	6%	6%	6%	4%	5%	6%
No	94%	91%	95%	92%	92%	95%	95%	93%	91%	96%	90%	91%	94%	95%	94%	94%	92%	61%	93%	94%
Don't know/can't say	1%	2%	0%	1%	2%	0%	1%	0%	1%	1%	0%	3%	0%	1%	0%	0%	2%	0%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	65%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q14. WHAT WAS THE REASON FOR THE CONTACT?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
To make a complaint	13%	0%	0%	22%	0%	14%	20%	0%	18%	0%	0%	0%	15%	0%	33%	0%	0%	0%	0%	13%
General enquiry	25%	33%	33%	11%	25%	43%	0%	25%	18%	33%	33%	50%	15%	33%	0%	50%	33%	25%	50%	19%
Request information	31%	33%	17%	33%	25%	14%	40%	25%	27%	33%	33%	0%	31%	33%	33%	0%	0%	50%	0%	31%
To report a problem	38%	0%	50%	33%	50%	29%	20%	50%	27%	33%	33%	50%	31%	33%	33%	50%	33%	25%	50%	31%
To obtain a water meter	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Payment issue - not specified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a change of address	6%	33%	0%	0%	0%	0%	20%	0%	9%	0%	0%	0%	8%	0%	0%	0%	33%	0%	0%	6%
To make an enquiry on the billing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Can't remember	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	113%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	16	3	6	9	4	7	5	4	11	3	3	2	13	3	6	2	3	4	2	16

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	7%	7%	7%	8%	5%	11%	4%	10%	7%	6%	0%	6%	9%	9%	3%	9%	8%	8%	7%	7%
Unacceptable	63%	60%	62%	65%	51%	63%	72%	66%	59%	65%	68%	59%	61%	65%	66%	76%	57%	53%	68%	62%
Acceptable	23%	22%	23%	22%	33%	20%	18%	20%	28%	20%	32%	22%	22%	20%	25%	9%	29%	27%	17%	24%
Very acceptable	1%	2%	2%	0%	3%	1%	0%	0%	0%	3%	0%	0%	1%	0%	0%	0%	2%	4%	2%	1%
Don't know/can't say	6%	9%	6%	5%	8%	5%	7%	5%	6%	7%	0%	13%	6%	6%	6%	6%	4%	8%	5%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 15 years
	Ensure the safety of tap water - drinking water quality	99.98% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 2,927 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	69 properties at risk of low water pressure at the tap. Supplies to 46 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.1% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £143
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	343 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	688 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	140km of river of poor/bad quality, 1,780km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £189
	CURRENT AVERAGE TOTAL BILL = £332	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	1%	0%	2%	0%	2%	0%	1%	0%	0%	2%	0%	0%	1%	0%	0%	3%	2%	0%	0%	1%
Fairly poor value for money	31%	33%	30%	32%	22%	27%	49%	30%	35%	29%	35%	25%	31%	39%	33%	52%	27%	10%	32%	31%
Neither poor nor good value for money	30%	27%	37%	21%	29%	34%	26%	30%	28%	32%	16%	31%	31%	26%	25%	18%	29%	49%	32%	29%
Fairly good value for money	34%	38%	26%	41%	41%	35%	19%	38%	32%	33%	48%	38%	32%	30%	38%	21%	39%	37%	29%	34%
Very good value for money	2%	0%	2%	3%	5%	1%	1%	0%	4%	1%	0%	0%	2%	1%	3%	0%	2%	2%	5%	1%
Don't know/can't say	3%	2%	4%	2%	2%	3%	4%	3%	2%	4%	0%	6%	3%	4%	2%	6%	2%	2%	2%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.04	3.05	2.96	3.15	3.26	3.10	2.69	3.08	3.05	3.02	3.13	3.13	3.04	2.94	3.11	2.61	3.13	3.32	3.08	3.04
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£27
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 15 years	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 20 years	£9
	99.98% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£8
	Approximately 2,927 customer complaints to water company about the appearance, taste or smell of tap water each year	15% reduction in complaints about tap water	£0
	69 properties at risk of low water pressure at the tap. Supplies to 46 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain the number of properties at risk of low water pressure at 69. Number of properties affected by unplanned interruptions expected as 99	£0
	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.1% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	4 schemes to better protect the supply network from severe weather safeguarding service for 173,000 people	£4
	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Maintain current service	£0
	WATER BILL - FROM £143 IN 2010 TO £187 IN 2014/5		
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	-£25
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£6
	343 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 134 properties at risk of internal flooding from sewers at least once in ten years	£1
	688 areas at risk of external flooding from sewers at least once in ten years	1,707 areas at risk of external flooding from sewers at least once in ten years	£1
	Sewerage system could occasionally be disrupted e.g. by extreme events	100 assets better protected from severe weather safeguarding service	<50p
	140km of river of poor/bad quality, 1,780km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 40km of river can better support fish and 170km can better support other wildlife: plus 0 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£13
	SEWERAGE BILL - FROM £194 IN 2010 TO £190 IN 2014/5		
TOTAL COMBINED BILL - FROM £337 IN 2010 TO £377 BY 2014/5			£40



Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)						Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban	
I value the improvements	23%	14%	29%	18%	18%	27%	20%	25%	21%	24%	29%	28%	21%	24%	19%	36%	14%	27%	7%	25%	
Improvements are worth the money	27%	38%	33%	13%	21%	22%	40%	21%	26%	31%	14%	50%	24%	18%	29%	18%	45%	23%	33%	26%	
Plan is affordable	48%	43%	36%	67%	59%	49%	36%	54%	48%	45%	57%	22%	52%	53%	52%	36%	41%	50%	53%	48%	
Have no choice but to pay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Don't know/can't say	2%	5%	2%	2%	3%	2%	4%	0%	5%	0%	0%	0%	3%	5%	0%	9%	0%	0%	7%	2%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
No of respondents	124	21	58	45	34	63	25	24	58	42	14	18	91	38	31	11	22	22	15	109	

Q25. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN AS A WHOLE AND THE IMPACT ON YOUR OVERALL BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)						Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban	
Completely unacceptable	15%	2%	19%	15%	17%	19%	7%	13%	14%	17%	6%	22%	16%	16%	16%	21%	8%	14%	20%	14%	
Unacceptable	55%	58%	50%	60%	40%	56%	65%	64%	52%	52%	55%	44%	55%	56%	55%	64%	49%	53%	54%	55%	
Acceptable	24%	31%	25%	19%	37%	20%	19%	18%	28%	23%	39%	31%	21%	20%	22%	12%	37%	27%	24%	24%	
Very acceptable	2%	0%	2%	3%	3%	2%	1%	3%	2%	2%	0%	0%	3%	3%	3%	0%	2%	2%	0%	3%	
Don't know/can't say	4%	9%	4%	3%	3%	3%	8%	2%	5%	6%	0%	3%	5%	5%	5%	3%	4%	4%	2%	5%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236	

Q26. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)						Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban	
I don't value the improvements	3%	0%	4%	1%	8%	1%	2%	2%	1%	4%	0%	5%	3%	0%	4%	0%	4%	6%	7%	2%	
Improvements not worth the money	9%	15%	13%	3%	14%	9%	8%	9%	7%	12%	0%	5%	11%	3%	9%	7%	21%	12%	0%	11%	
Too expensive already	71%	70%	68%	74%	67%	70%	77%	66%	76%	69%	68%	62%	73%	72%	69%	79%	68%	68%	83%	69%	
Cannot afford it	13%	11%	12%	15%	8%	14%	11%	19%	11%	11%	21%	29%	10%	19%	13%	7%	7%	12%	10%	13%	
Oppose paying more for a natural resource	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Oppose paying more to companies who make large profits	4%	4%	2%	5%	0%	6%	2%	4%	3%	4%	5%	0%	4%	5%	2%	7%	0%	3%	0%	4%	
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Don't know/can't say	1%	0%	0%	1%	3%	0%	0%	0%	1%	0%	5%	0%	0%	0%	2%	0%	0%	0%	0%	1%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
No of respondents	193	27	92	74	36	99	53	47	72	74	19	21	142	58	45	28	28	34	30	163	

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)						Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban	
I value the improvements	21%	7%	31%	14%	24%	23%	13%	15%	19%	26%	42%	10%	18%	17%	19%	25%	21%	27%	20%	21%	
Improvements are worth the money	38%	50%	39%	27%	28%	30%	60%	38%	34%	41%	17%	60%	39%	33%	44%	25%	42%	33%	20%	40%	
Plan is affordable	39%	36%	31%	55%	44%	43%	27%	38%	47%	30%	33%	30%	41%	44%	38%	50%	37%	33%	50%	37%	
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Don't know/can't say	3%	7%	0%	5%	4%	3%	0%	8%	0%	4%	8%	0%	2%	6%	0%	0%	0%	7%	10%	2%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
No of respondents	72	14	36	22	25	30	15	13	32	27	12	10	49	18	16	4	19	15	10	62	

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	5%	14%	34%	34%	13%	1%	277
Ensure a reliable and continuous water supply	5%	13%	29%	31%	20%	1%	277
Ensure the safety of tap water – drinking water quality	3%	18%	28%	26%	24%	1%	277
Manage the appearance, taste and smell of tap water	3%	15%	23%	36%	21%	1%	277
Manage the pressure of water in your taps and the number of unplanned interruptions	1%	12%	30%	38%	17%	1%	277
Handle customers' accounts, queries, complaints and customers with special needs	4%	14%	29%	35%	17%	1%	277
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3%	21%	29%	33%	13%	1%	277
Manage the amount of water taken from the environment to supply customers	3%	13%	29%	33%	21%	2%	277
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	19%	27%	33%	16%	1%	277
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	1%	11%	33%	31%	23%	1%	277
Avoid risk of homes being flooded with sewage	1%	9%	34%	35%	20%	1%	277
Avoid risk of properties being flooded with sewage outside the home	1%	14%	28%	37%	20%	1%	277
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3%	19%	28%	30%	18%	2%	277
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	10%	31%	37%	19%	1%	277
TOTAL	3%	15%	29%	33%	19%	1%	277

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.35	3.52	3.36	3.27	3.39	3.24	3.51	3.30	3.40	3.34	3.61	3.10	3.36	3.38	3.33	3.44	3.48	3.18	3.33	3.36
Ensure a reliable and continuous water supply	3.48	3.80	3.52	3.30	3.45	3.38	3.67	3.43	3.38	3.61	3.81	3.35	3.46	3.47	3.44	3.66	3.60	3.33	3.35	3.50
Ensure the safety of tap water – drinking water quality	3.51	3.66	3.52	3.44	3.47	3.49	3.57	3.52	3.54	3.48	3.90	3.42	3.48	3.65	3.42	3.56	3.69	3.22	3.38	3.53
Manage the appearance, taste and smell of tap water	3.57	3.77	3.61	3.43	3.55	3.52	3.68	3.51	3.61	3.57	3.81	3.74	3.54	3.56	3.59	3.78	3.79	3.22	3.50	3.58
Manage the pressure of water in your taps and the number of unplanned interruptions	3.59	3.82	3.60	3.47	3.56	3.52	3.75	3.53	3.65	3.55	3.83	3.56	3.56	3.60	3.63	3.81	3.71	3.24	3.51	3.60
Handle customers' accounts, queries, complaints and customers with special needs	3.48	3.75	3.48	3.37	3.52	3.32	3.75	3.42	3.56	3.44	3.55	3.55	3.47	3.45	3.53	3.59	3.71	3.20	3.34	3.51
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.31	3.38	3.31	3.29	3.30	3.19	3.58	3.36	3.38	3.22	3.61	3.00	3.32	3.42	3.28	3.19	3.67	2.92	3.15	3.34
Manage the amount of water taken from the environment to supply customers	3.57	3.74	3.56	3.51	3.51	3.48	3.80	3.62	3.70	3.41	3.77	3.48	3.56	3.62	3.55	3.63	3.85	3.22	3.46	3.59
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.39	3.61	3.31	3.40	3.39	3.29	3.60	3.37	3.50	3.30	3.52	3.13	3.42	3.46	3.38	3.56	3.43	3.18	3.20	3.42
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.64	3.84	3.58	3.63	3.59	3.52	3.90	3.61	3.72	3.57	3.87	3.59	3.61	3.72	3.56	3.69	3.83	3.39	3.59	3.65
Avoid risk of homes being flooded with sewage	3.64	3.80	3.59	3.64	3.60	3.55	3.84	3.63	3.75	3.53	3.74	3.41	3.68	3.68	3.69	3.63	3.83	3.35	3.54	3.66
Avoid risk of properties being flooded with sewage outside the home	3.62	3.73	3.57	3.63	3.59	3.55	3.81	3.68	3.69	3.51	3.90	3.47	3.62	3.70	3.69	3.66	3.69	3.31	3.39	3.66
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.43	3.64	3.40	3.38	3.52	3.32	3.57	3.43	3.50	3.37	3.70	3.23	3.41	3.51	3.41	3.56	3.68	3.02	3.30	3.45
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.63	3.77	3.64	3.56	3.70	3.51	3.81	3.68	3.67	3.57	3.84	3.50	3.62	3.66	3.67	3.69	3.79	3.35	3.46	3.66
TOTAL	3.52	3.70	3.50	3.45	3.51	3.42	3.70	3.51	3.57	3.46	3.75	3.39	3.51	3.56	3.51	3.60	3.70	3.22	3.39	3.54
No of respondents	277	44	132	98	62	133	72	60	108	106	31	31	199	79	64	32	48	51	40	234

Q28b. VALUE FOR MONEY OF WATER SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	12%	9%	11%	13%	8%	14%	12%	15%	10%	11%	6%	9%	13%	25%	5%	12%	4%	6%	10%	12%
Fairly poor value for money	39%	42%	37%	40%	33%	38%	43%	36%	39%	41%	26%	34%	41%	35%	44%	48%	35%	37%	51%	37%
Neither poor nor good value for money	22%	18%	25%	20%	24%	21%	24%	26%	19%	22%	23%	22%	21%	16%	28%	15%	22%	27%	15%	23%
Fairly good value for money	24%	24%	25%	22%	29%	26%	16%	18%	28%	22%	39%	31%	22%	21%	23%	18%	31%	25%	22%	24%
Very good value for money	2%	4%	1%	3%	5%	1%	1%	2%	3%	2%	6%	0%	1%	1%	0%	3%	4%	4%	0%	3%
Don't know/can't say	1%	2%	2%	1%	2%	1%	3%	3%	1%	1%	0%	3%	1%	1%	0%	3%	4%	0%	2%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	0%	2%	2%	0%	3%	1%	2%	2%	2%	0%	3%	2%	0%	5%	3%	0%	2%	5%	1%
Fairly poor value for money	32%	36%	30%	34%	27%	30%	43%	28%	34%	34%	39%	31%	31%	35%	36%	45%	31%	18%	49%	30%
Neither poor nor good value for money	29%	22%	37%	22%	30%	31%	23%	31%	28%	30%	13%	31%	30%	21%	20%	30%	31%	51%	22%	31%
Fairly good value for money	27%	33%	22%	31%	25%	28%	28%	30%	27%	26%	26%	28%	29%	36%	33%	12%	24%	18%	22%	28%
Very good value for money	9%	9%	8%	10%	17%	8%	3%	8%	10%	7%	23%	6%	7%	8%	6%	6%	12%	12%	2%	10%
Don't know/can't say	1%	0%	2%	0%	0%	1%	1%	2%	0%	1%	0%	0%	0%	0%	0%	3%	2%	0%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q28b. VALUE FOR MONEY OF COMBINED SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	10%	7%	11%	9%	8%	11%	9%	13%	7%	10%	3%	6%	12%	15%	11%	3%	4%	10%	5%	11%
Fairly poor value for money	47%	47%	43%	54%	38%	50%	49%	46%	50%	46%	39%	47%	48%	48%	47%	70%	37%	43%	71%	43%
Neither poor nor good value for money	19%	20%	23%	14%	22%	15%	27%	18%	19%	21%	19%	22%	18%	18%	22%	12%	22%	22%	7%	22%
Fairly good value for money	20%	22%	20%	19%	25%	22%	14%	20%	20%	21%	26%	25%	20%	19%	19%	9%	31%	22%	15%	21%
Very good value for money	3%	4%	1%	4%	6%	2%	0%	2%	4%	2%	13%	0%	1%	1%	2%	3%	4%	4%	2%	3%
Don't know/can't say	1%	0%	2%	0%	0%	1%	1%	2%	0%	1%	0%	0%	0%	0%	0%	3%	2%	0%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		Age	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Total water bill by 2014-15	2.66	2.73	2.66	2.61	2.89	2.63	2.50	2.54	2.75	2.62	3.13	2.77	2.57	2.38	2.70	2.50	2.96	2.84	2.50	2.68
Total sewerage bill by 2014-15	3.08	3.16	3.02	3.13	3.33	3.07	2.88	3.15	3.09	3.04	3.32	3.03	3.08	3.16	3.00	2.72	3.19	3.20	2.68	3.15
Total combined bill by 2014-15	2.58	2.71	2.56	2.56	2.84	2.52	2.45	2.50	2.63	2.58	3.06	2.66	2.50	2.44	2.53	2.38	2.94	2.67	2.39	2.62
No of respondents	277	44	132	98	62	133	72	60	108	106	31	31	199	79	64	32	48	51	40	234

Q29. ARE THERE ANY OTHER CHANGES TO THE COMPANY PLAN THAT YOU WOULD LIKE TO SEE MADE THAT HAVE NOT BEEN COVERED?

	Total
Reduce prices / charges	0%
Improve water appearance / colour / quality / taste	0%
Quicker response times	0%
Reduce number of leakages / increase repairs to pipes	0%
Improve the sewage system	0%
Generally take more responsibility	0%
Install water meters nationally	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Improve the water pressure	0%
Deal with the drainage problems/ flooding problems	0%
Give the option to install a water meter	0%
Be responsible for repairs to all pipes	0%
Have a fairer pricing / water charging scheme	0%
Increase in charges should be linked to improvements	0%
Service should be nationalized	0%
Improve water saving methods	0%
Water is too chalky / hard water / lime scale problems	0%
Improve level of service / customer service / customer information	0%
Protect nature / wildlife / environment	0%
Reduce money wastage (unspecified source)	0%
More frequent meter readings	0%
Plan should already be in action / already doing things like this	0%
Other	0%
None	99%
Don't know	1%
Refused	0%
No of respondents	277

**Please note: multiple responses were allowed in this question. Percentages show number of respondents giving an answer.

Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

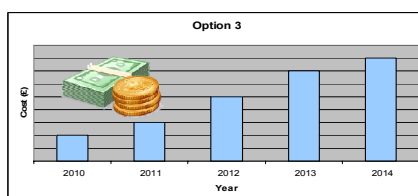
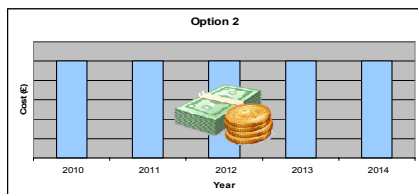
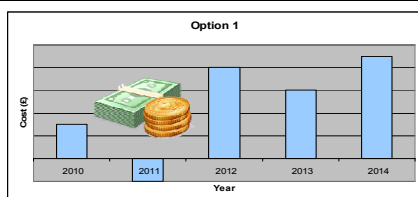
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	16%	13%	12%	21%	17%	13%	19%	20%	18%	10%	23%	6%	16%	26%	14%	9%	8%	12%	7%	17%
Ensure a reliable and continuous water supply	71%	76%	74%	66%	60%	65%	89%	67%	71%	74%	55%	63%	73%	68%	70%	70%	82%	69%	71%	71%
Ensure the safety of tap water – drinking water quality	76%	80%	76%	75%	63%	74%	88%	77%	77%	75%	71%	72%	76%	80%	77%	76%	71%	75%	71%	77%
Manage the appearance, taste and smell of tap water	47%	53%	48%	42%	38%	47%	53%	43%	44%	52%	35%	31%	49%	44%	39%	52%	53%	53%	46%	47%
Manage the pressure of water in your taps and the number of unplanned interruptions	4%	2%	2%	6%	3%	5%	1%	5%	6%	0%	0%	0%	5%	5%	2%	3%	2%	6%	0%	4%
Handle customers' accounts, queries, complaints and customers with special needs	12%	13%	14%	8%	10%	13%	11%	18%	8%	11%	16%	16%	10%	9%	14%	9%	14%	12%	5%	13%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	2%	2%	2%	3%	2%	1%	2%	2%	3%	0%	3%	2%	3%	2%	3%	4%	0%	2%	2%
Manage the amount of water taken from the environment to supply customers	2%	0%	3%	1%	3%	2%	0%	0%	4%	1%	3%	3%	1%	0%	2%	3%	4%	2%	0%	2%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	0%	4%	1%	2%	4%	0%	3%	3%	1%	3%	0%	2%	1%	5%	0%	0%	4%	0%	3%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3%	2%	2%	4%	3%	3%	3%	3%	1%	5%	3%	3%	3%	3%	5%	0%	2%	4%	0%	3%
Avoid risk of homes being flooded with sewage	3%	0%	1%	6%	3%	4%	0%	2%	5%	1%	6%	0%	2%	4%	3%	3%	0%	2%	0%	3%
Avoid risk of properties being flooded with sewage outside the home	6%	2%	8%	5%	5%	10%	0%	5%	6%	7%	6%	9%	5%	9%	3%	3%	8%	4%	5%	6%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3%	0%	5%	3%	5%	3%	3%	5%	3%	3%	10%	3%	2%	4%	6%	0%	0%	4%	5%	3%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	4%	2%	1%	0%	2%	3%	0%	1%	4%	0%	3%	2%	3%	3%	0%	2%	0%	0%	2%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	3%	0%	5%	2%	5%	4%	1%	0%	4%	5%	3%	3%	3%	1%	5%	3%	2%	6%	2%	3%
Bills show one big change in first year, then stay the same for the following four years	6%	4%	5%	9%	5%	7%	7%	7%	8%	4%	6%	0%	7%	10%	8%	0%	6%	2%	2%	7%
Bills change steadily every year, so that customers do not see big changes from year to year	91%	96%	90%	89%	90%	89%	92%	93%	88%	92%	90%	97%	89%	89%	88%	97%	92%	92%	95%	90%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	277	45	133	99	63	133	74	61	109	107	31	32	201	80	64	33	49	51	41	236



The results of this research are different to Bristol Water's market research on this subject. As a result, the Company has commissioned further independent market research to help shape its Final Business Plan

3.6 Other Company Information

GENDER

	Total
Male	50%
Female	50%
No of respondents	277

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	55%
Jointly responsible for household finances along with spouse/partner	43%
Contributor to shared household expenses (e.g. house/flatmate, parents)	1%
Payment through private rent	0%
Payment through Council rent/social housing	1%
Other	0%
Refused	0%
No of respondents	277

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	36%
Employed Part-time (9-29 hours)	13%
Retired	32%
Not working and not looking for work	9%
Student	4%
Not working and looking for work	4%
Other	0%
Refused	1%
No of respondents	277

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	3%
B	9%
C	5%
D	9%
E	3%
F	2%
G	1%
H	0%
Don't know	68%
No of respondents	277

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	*%
Don't increase / should reduce charges	1%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	1%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	*%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	*%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	*%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	*%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	*%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	*%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	1%
None	95%
Don't know	*%
Refused	0%
No of respondents	277

**Please note: multiple responses were allowed in this question
Bristol Water

1. Key Findings

Cambridge Water is a water company billing 113,900 properties for water services. Sewerage services for Cambridge Water are provided by Anglian Water.

Uninformed Views of Current and Future Services

85% of customers stated that they were **satisfied** with the services provided by Cambridge Water, whereas 9% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (44%) and that there were no problems with the service (41%). The main reasons that customers were dissatisfied was that it was too expensive already (68%), prices are always increasing (14%) and the water services were poor/unreliable (14%).

60% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that they valued the service (35%), the service was worth the money (33%) and the bill was affordable (24%). 16% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (89%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Cambridge Water and Anglian Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 46% felt that the overall company plan was **acceptable**, 45% felt that it was **unacceptable**, and 9% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

51% of customers stated that the current water service was **good value for money**, 48% stated the current sewerage service (provided by Anglian Water) was good value for money, and 45% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the service was worth the money (35%), they valued the service (34%) and the bill was affordable (24%).

26% of customers stated that the current water service was **poor value for money**, 26% stated the current sewerage service was poor value for money, and 25% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (83%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.27 for **water** services, 3.25 for **sewerage** services, and 3.21 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Cambridge Water's water and Anglian Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

50% of customers felt that Cambridge Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that they valued the improvements (38%), the improvements are worth the money (25%) and the plan is affordable (23%).

40% of customers felt that Cambridge Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (68%) and that the improvements are not worth the money (12%).

48% of customers felt that Anglian Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that they valued the improvements (37%), the plan is affordable (29%) and the improvements are worth the money (25%).

42% of customers felt that Anglian Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (66%) and that the improvements are not worth the money (11%).

49% of customers felt that Cambridge Water's and Anglian Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that they valued the improvements (33%), the improvements are worth the money (30%) and the plan is affordable (28%).

40% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (64%) and that the improvements are not worth the money (13%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.17 for Cambridge Water's **water** services, 3.08 for Anglian Water's **sewerage** services, and 3.11 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 37% (water service), 33% (sewerage) and 35% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 26% (water service), 26% (sewerage service) and 26% (service overall).

Timing

57% of Cambridge Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year, whereas 30% would like to see bills change every year according to how much work water companies have to do.

2. Introduction

The attitudes and preferences of Cambridge Water's customers, reported in section 3, are based on a sample of 254. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis.

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	84%	97%	90%	72%	85%	79%	88%	72%	80%	93%	77%	78%	88%	70%	85%	92%	89%	84%	90%	81%
Transport	89%	97%	85%	91%	91%	85%	91%	89%	88%	89%	90%	83%	92%	84%	97%	96%	83%	89%	93%	87%
Health Services	98%	100%	99%	96%	100%	96%	99%	96%	98%	99%	97%	98%	99%	95%	100%	100%	98%	98%	99%	98%
Crime Prevention	96%	97%	95%	97%	99%	96%	91%	96%	98%	93%	97%	97%	95%	93%	94%	100%	94%	97%	98%	95%
Environment	95%	97%	94%	96%	96%	95%	96%	94%	98%	93%	93%	95%	96%	93%	100%	92%	93%	96%	97%	95%
Cost of Living	95%	97%	94%	96%	92%	97%	97%	96%	97%	93%	95%	90%	98%	98%	97%	96%	91%	95%	94%	96%
Immigration	56%	63%	54%	56%	56%	54%	57%	52%	55%	59%	48%	46%	63%	56%	63%	68%	59%	49%	67%	50%
Water and Sewerage Services	93%	97%	90%	94%	89%	95%	96%	94%	94%	91%	90%	95%	92%	95%	100%	88%	87%	93%	91%	94%
Utility Services	94%	100%	91%	96%	91%	96%	97%	96%	97%	91%	93%	97%	93%	98%	100%	96%	87%	94%	94%	95%
TOTAL	89%	94%	88%	88%	89%	88%	90%	87%	90%	89%	87%	87%	91%	87%	93%	92%	87%	89%	92%	88%
No of respondents	253	35	110	99	93	92	68	54	94	105	61	60	107	43	34	26	47	103	88	165

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	48%	46%	45%	51%	43%	54%	45%	53%	39%	52%	46%	42%	51%	70%	50%	54%	34%	42%	48%	48%
Improving air quality	21%	31%	19%	21%	15%	23%	28%	27%	20%	19%	16%	22%	21%	20%	9%	23%	15%	28%	23%	20%
Reducing climate change	53%	60%	57%	46%	58%	54%	45%	38%	59%	56%	54%	57%	53%	32%	68%	62%	62%	51%	57%	51%
More activity on nature conservation etc	12%	17%	12%	12%	16%	10%	10%	7%	13%	14%	13%	10%	14%	2%	18%	12%	17%	13%	14%	11%
Reducing litter and household waste	32%	31%	39%	25%	31%	27%	41%	29%	29%	37%	30%	27%	36%	32%	29%	23%	36%	34%	26%	36%
Improvements to tackling flooding	14%	11%	10%	19%	15%	15%	10%	16%	19%	8%	18%	10%	13%	16%	15%	12%	15%	13%	13%	14%
Encouraging people to use less water	8%	0%	7%	12%	13%	4%	7%	13%	10%	5%	16%	13%	3%	11%	9%	12%	9%	6%	10%	7%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	91%	91%	90%	94%	91%	93%	88%	93%	94%	89%	90%	95%	89%	95%	88%	88%	91%	91%	92%	91%
Removal and treatment of waste water	83%	86%	83%	84%	85%	83%	80%	76%	84%	85%	82%	83%	83%	86%	82%	88%	87%	78%	82%	83%
Dealing with sewer flooding	67%	69%	71%	64%	71%	64%	65%	58%	66%	72%	67%	72%	66%	75%	74%	85%	68%	56%	69%	66%
Maintaining pipes, treatment works, and other infrastructure	72%	66%	78%	67%	82%	74%	55%	55%	73%	79%	75%	77%	68%	75%	74%	69%	81%	66%	75%	70%
Protecting the water environment	68%	60%	72%	67%	76%	68%	57%	67%	64%	72%	72%	72%	70%	77%	68%	65%	74%	62%	59%	73%
Managing water pollution from agriculture and manufacturing	48%	40%	58%	42%	51%	52%	41%	42%	45%	55%	52%	43%	53%	57%	53%	54%	55%	39%	49%	48%
Drainage of roads	55%	51%	63%	49%	53%	64%	45%	44%	56%	59%	51%	52%	61%	57%	68%	62%	64%	44%	55%	55%
Reducing litter in waterways	52%	46%	54%	51%	52%	52%	51%	55%	51%	50%	49%	42%	58%	59%	56%	42%	57%	47%	51%	52%
Preventing flooding from rivers	47%	49%	51%	44%	45%	50%	45%	40%	46%	51%	36%	42%	57%	55%	62%	38%	53%	38%	45%	48%
Managing canal systems	39%	46%	46%	30%	38%	39%	39%	33%	33%	47%	33%	28%	49%	50%	47%	42%	40%	29%	36%	40%
Helping to reduce greenhouse gas emissions and tackle climate change	44%	49%	46%	40%	48%	41%	41%	31%	41%	52%	36%	43%	48%	50%	59%	50%	49%	32%	44%	43%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

Q12. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR APPROACH TO PAYING YOUR BILL/S?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't find it difficult to pay on time	85%	79%	87%	88%	97%	78%	77%	80%	90%	84%	93%	87%	82%	78%	69%	96%	93%	87%	95%	79%
I usually pay on time, but it can be difficult	11%	11%	13%	9%	3%	16%	18%	16%	8%	12%	3%	11%	15%	20%	16%	0%	7%	12%	3%	16%
I sometimes pay late depending on what other bills I have to pay	2%	7%	0%	3%	0%	4%	3%	4%	1%	2%	3%	2%	2%	3%	13%	0%	0%	0%	1%	3%
I often find it a challenge and have to delay payments as long as possible	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't usually pay my bills on time	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	1%	4%	1%	0%	0%	2%	2%	0%	1%	2%	0%	0%	1%	0%	3%	4%	0%	1%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	235	28	104	94	92	83	60	50	88	97	59	54	100	40	32	26	45	92	87	148

Please note this question was only asked to sole/joint responsibility bill payers.

Q13. HAVE YOU/HOUSEHOLD MEMBER CONTACTED YOUR WATER AND SEWERAGE COMPANY OTHER THAN TO PAY THE BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	10%	6%	11%	10%	11%	11%	7%	9%	13%	8%	15%	12%	6%	9%	12%	15%	13%	4%	11%	9%
No	89%	91%	87%	90%	89%	87%	91%	91%	86%	90%	85%	87%	93%	89%	85%	85%	87%	21%	89%	89%
Don't know/can't say	1%	3%	2%	0%	0%	2%	1%	0%	1%	2%	0%	2%	1%	2%	3%	0%	0%	0%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	25%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

Q14. WHAT WAS THE REASON FOR THE CONTACT?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
To make a complaint	8%	0%	8%	9%	9%	9%	0%	20%	0%	13%	20%	0%	0%	0%	0%	0%	17%	14%	9%	6%
General enquiry	36%	100%	31%	27%	27%	36%	40%	0%	50%	25%	30%	50%	14%	50%	60%	40%	0%	29%	27%	38%
Request information	4%	0%	8%	0%	0%	0%	20%	20%	0%	0%	10%	0%	0%	0%	0%	20%	0%	0%	0%	6%
To report a problem	52%	0%	46%	55%	55%	45%	40%	60%	36%	63%	40%	25%	86%	50%	40%	40%	83%	29%	55%	44%
To obtain a water meter	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Payment issue - not specified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a change of address	4%	0%	0%	9%	9%	0%	0%	0%	7%	0%	0%	13%	0%	0%	0%	0%	0%	14%	9%	0%
To make an enquiry on the billing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	4%	0%	8%	0%	0%	9%	0%	0%	7%	0%	0%	13%	0%	0%	0%	0%	0%	14%	0%	6%
Can't remember	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	108%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	25	2	13	11	11	11	5	5	14	8	10	8	7	4	5	5	6	7	11	16

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	10%	6%	10%	12%	13%	13%	3%	9%	7%	13%	16%	7%	8%	11%	12%	8%	13%	9%	11%	10%
Unacceptable	35%	46%	37%	27%	29%	33%	45%	36%	31%	37%	20%	35%	44%	39%	38%	31%	26%	37%	39%	33%
Acceptable	43%	46%	43%	45%	45%	45%	39%	42%	47%	41%	51%	42%	41%	39%	44%	50%	55%	38%	36%	47%
Very acceptable	3%	0%	4%	3%	4%	3%	0%	4%	2%	3%	3%	5%	2%	2%	3%	4%	2%	3%	6%	1%
Don't know/can't say	9%	3%	6%	13%	9%	7%	13%	9%	13%	6%	10%	12%	6%	9%	3%	8%	4%	14%	8%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 20 years
	Ensure the safety of tap water - drinking water quality	100% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 350 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	17 properties at risk of low water pressure at the tap. Supplies to 39 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 2 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £115
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	422 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	389 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £197
	CURRENT AVERAGE TOTAL BILL = £312	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	6%	3%	5%	7%	6%	9%	1%	5%	4%	8%	7%	3%	6%	9%	6%	0%	9%	5%	5%	7%
Fairly poor value for money	20%	34%	22%	13%	15%	13%	35%	18%	13%	27%	5%	20%	29%	27%	29%	27%	17%	13%	20%	19%
Neither poor nor good value for money	21%	20%	18%	23%	22%	21%	22%	22%	27%	16%	26%	17%	19%	16%	26%	0%	23%	26%	25%	19%
Fairly good value for money	44%	37%	46%	47%	47%	48%	35%	44%	48%	41%	52%	50%	39%	43%	35%	54%	43%	46%	39%	47%
Very good value for money	7%	0%	6%	9%	8%	7%	6%	9%	7%	5%	10%	8%	4%	5%	3%	15%	6%	7%	11%	4%
Don't know/can't say	2%	6%	2%	1%	2%	3%	1%	2%	1%	4%	0%	2%	4%	0%	0%	4%	2%	4%	0%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.27	2.97	3.27	3.38	3.35	3.31	3.09	3.33	3.42	3.09	3.54	3.41	3.05	3.07	3.00	3.60	3.22	3.38	3.32	3.24
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015	
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£9	
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 20 years	Maintain current service	£6	
	100% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£8	
	Approximately 350 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0	
	17 properties at risk of low water pressure at the tap. Supplies to 39 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 0 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 12	<50p	
	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0	
	Water supplies could occasionally be disrupted e.g. by extreme events	4 assets better protected from severe weather safeguarding service	£0	
	Fish and wildlife at 2 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Maintain current service	£0	
WATER BILL - FROM £114 IN 2010 TO £137 IN 2014/5			£23	
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service for these services and reduce smells from sewage treatment works	£3	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£3	
	422 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 149 properties at risk of internal flooding from sewers at least once in ten years	<50p	
	389 areas at risk of external flooding from sewers at least once in ten years	Reduce by 133 the areas at risk of external flooding from sewers at least once in ten years	<50p	
	Sewerage system could occasionally be disrupted e.g. by extreme events	367 assets better protected from severe weather safeguarding service for 2.8 million people	<50p	
	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 240km of river can better support fish and 330km can better support other wildlife: plus 8 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£3	
	SEWERAGE BILL - FROM £200 IN 2010 TO £209 IN 2014/5			£9
	TOTAL COMBINED BILL - FROM £314 IN 2010 TO £346 BY 2014/5			£32

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	37%	40%	40%	32%	35%	33%	45%	28%	38%	39%	42%	37%	31%	29%	38%	44%	26%	43%	51%	29%
Improvements are worth the money	25%	27%	24%	28%	35%	24%	10%	32%	21%	25%	30%	23%	24%	24%	19%	25%	33%	23%	26%	25%
Plan is affordable	29%	20%	31%	28%	23%	31%	38%	28%	32%	27%	21%	27%	35%	35%	19%	31%	33%	28%	21%	34%
Have no choice but to pay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	9%	13%	5%	13%	8%	12%	7%	12%	9%	8%	6%	13%	10%	12%	25%	0%	7%	6%	2%	13%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	123	15	58	47	52	42	29	25	47	51	33	30	51	17	16	16	27	47	43	80

Q25. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN AS A WHOLE AND THE IMPACT ON YOUR OVERALL BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	7%	9%	8%	5%	9%	7%	4%	7%	5%	8%	8%	8%	5%	2%	9%	4%	9%	8%	10%	5%
Unacceptable	33%	46%	33%	29%	27%	35%	41%	35%	30%	36%	21%	28%	42%	41%	35%	35%	26%	33%	33%	34%
Acceptable	45%	37%	47%	47%	51%	45%	39%	44%	47%	45%	51%	47%	44%	39%	47%	54%	53%	42%	43%	46%
Very acceptable	4%	3%	6%	3%	8%	2%	3%	4%	4%	5%	5%	5%	4%	2%	0%	8%	6%	5%	6%	4%
Don't know/can't say	10%	6%	5%	16%	6%	12%	13%	11%	14%	7%	15%	12%	6%	16%	9%	0%	6%	13%	8%	11%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

Q26. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	9%	11%	7%	12%	18%	0%	10%	4%	15%	7%	11%	9%	4%	0%	13%	10%	13%	10%	8%	9%
Improvements not worth the money	13%	11%	9%	15%	21%	8%	10%	13%	18%	9%	39%	5%	10%	5%	13%	0%	19%	17%	16%	11%
Too expensive already	64%	58%	73%	59%	48%	74%	68%	65%	55%	70%	33%	68%	72%	89%	60%	80%	56%	52%	58%	67%
Cannot afford it	8%	21%	0%	12%	3%	11%	10%	17%	6%	4%	11%	9%	6%	5%	7%	0%	0%	14%	5%	9%
Oppose paying more for a natural resource	2%	0%	2%	0%	3%	0%	3%	0%	0%	4%	0%	0%	4%	0%	0%	0%	6%	2%	3%	2%
Oppose paying more to companies who make large profits	4%	0%	7%	3%	3%	8%	0%	0%	3%	7%	6%	9%	2%	0%	7%	10%	6%	2%	8%	2%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	0%	2%	0%	3%	0%	0%	0%	3%	0%	0%	0%	2%	0%	0%	0%	0%	2%	3%	0%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	102	19	45	34	33	38	31	23	33	46	18	22	50	19	15	10	16	42	38	64

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	33%	43%	39%	26%	33%	30%	38%	31%	33%	35%	44%	35%	25%	33%	25%	44%	25%	38%	44%	28%
Improvements are worth the money	30%	21%	25%	36%	33%	37%	14%	31%	31%	29%	35%	29%	27%	28%	31%	19%	36%	31%	30%	30%
Plan is affordable	28%	36%	29%	24%	24%	26%	38%	27%	29%	27%	18%	26%	37%	28%	31%	38%	25%	25%	26%	29%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	9%	0%	7%	14%	9%	7%	10%	12%	6%	10%	3%	10%	12%	11%	13%	0%	14%	6%	0%	13%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	126	14	59	50	54	43	29	26	48	52	34	31	52	18	16	16	28	48	43	83

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	2%	15%	28%	46%	6%	2%	254
Ensure a reliable and continuous water supply	2%	17%	31%	41%	8%	2%	254
Ensure the safety of tap water – drinking water quality	2%	15%	32%	36%	13%	2%	254
Manage the appearance, taste and smell of tap water	2%	16%	30%	39%	12%	1%	254
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	16%	30%	40%	9%	3%	254
Handle customers’ accounts, queries, complaints and customers with special needs	2%	15%	32%	36%	12%	3%	254
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	14%	31%	39%	11%	2%	254
Manage the amount of water taken from the environment to supply customers	2%	12%	37%	35%	12%	2%	254
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3%	17%	33%	37%	9%	2%	254
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	13%	33%	37%	12%	3%	254
Avoid risk of homes being flooded with sewage	3%	13%	32%	37%	13%	2%	254
Avoid risk of properties being flooded with sewage outside the home	2%	15%	33%	35%	11%	4%	254
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3%	14%	33%	36%	11%	3%	254
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	4%	13%	35%	36%	11%	2%	254
TOTAL	2%	15%	32%	38%	11%	2%	254

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.38	3.42	3.25	3.55	3.32	3.41	3.42	3.42	3.42	3.32	3.61	3.53	3.19	3.43	3.15	3.42	3.36	3.43	3.32	3.41
Ensure a reliable and continuous water supply	3.35	3.47	3.21	3.47	3.30	3.40	3.36	3.31	3.38	3.35	3.60	3.43	3.22	3.25	3.18	3.35	3.36	3.45	3.37	3.34
Ensure the safety of tap water – drinking water quality	3.45	3.46	3.33	3.58	3.45	3.39	3.51	3.36	3.57	3.38	3.69	3.54	3.28	3.32	3.35	3.42	3.41	3.55	3.49	3.42
Manage the appearance, taste and smell of tap water	3.44	3.57	3.32	3.57	3.44	3.37	3.53	3.33	3.57	3.38	3.62	3.60	3.25	3.34	3.41	3.58	3.31	3.51	3.53	3.39
Manage the pressure of water in your taps and the number of unplanned interruptions	3.39	3.49	3.29	3.46	3.42	3.30	3.46	3.26	3.49	3.37	3.52	3.47	3.27	3.27	3.21	3.48	3.45	3.45	3.39	3.39
Handle customers’ accounts, queries, complaints and customers with special needs	3.42	3.46	3.35	3.46	3.50	3.35	3.39	3.35	3.54	3.35	3.59	3.56	3.28	3.32	3.12	3.46	3.59	3.47	3.43	3.41
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.44	3.34	3.36	3.57	3.48	3.47	3.34	3.27	3.61	3.38	3.78	3.52	3.27	3.33	3.24	3.58	3.52	3.47	3.49	3.40
Manage the amount of water taken from the environment to supply customers	3.44	3.40	3.42	3.51	3.45	3.46	3.41	3.35	3.53	3.41	3.64	3.63	3.31	3.36	3.24	3.58	3.64	3.42	3.54	3.39
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.34	3.40	3.25	3.41	3.28	3.43	3.30	3.20	3.47	3.30	3.54	3.40	3.22	3.25	3.24	3.50	3.41	3.34	3.38	3.32
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.45	3.34	3.31	3.65	3.44	3.52	3.37	3.37	3.58	3.38	3.69	3.62	3.25	3.36	3.33	3.60	3.59	3.43	3.55	3.40
Avoid risk of homes being flooded with sewage	3.44	3.40	3.32	3.59	3.44	3.48	3.38	3.43	3.58	3.32	3.77	3.52	3.25	3.43	3.15	3.58	3.51	3.47	3.51	3.40
Avoid risk of properties being flooded with sewage outside the home	3.40	3.39	3.32	3.49	3.44	3.36	3.40	3.35	3.49	3.34	3.63	3.59	3.23	3.30	3.18	3.50	3.50	3.45	3.43	3.38
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.40	3.29	3.32	3.55	3.46	3.37	3.34	3.36	3.58	3.26	3.71	3.44	3.25	3.40	3.12	3.42	3.50	3.43	3.40	3.40
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.39	3.47	3.33	3.45	3.43	3.32	3.43	3.24	3.54	3.33	3.62	3.49	3.24	3.30	3.26	3.36	3.59	3.39	3.44	3.36
TOTAL	3.41	3.42	3.31	3.52	3.42	3.40	3.40	3.33	3.53	3.35	3.64	3.52	3.25	3.33	3.23	3.49	3.48	3.45	3.45	3.39
No of respondents	254	33	110	97	90	91	67	55	90	103	59	60	105	44	33	26	45	100	87	161

Q28b. VALUE FOR MONEY OF WATER SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	0%	2%	3%	3%	1%	1%	2%	3%	1%	0%	0%	5%	2%	0%	4%	2%	2%	3%	1%
Fairly poor value for money	24%	20%	28%	21%	25%	22%	28%	25%	20%	28%	25%	23%	25%	25%	26%	19%	26%	24%	30%	22%
Neither poor nor good value for money	34%	40%	31%	36%	29%	34%	42%	35%	36%	32%	25%	38%	35%	34%	44%	27%	26%	37%	27%	38%
Fairly good value for money	30%	37%	30%	29%	31%	35%	23%	27%	33%	30%	36%	25%	31%	25%	24%	50%	36%	27%	28%	31%
Very good value for money	7%	0%	9%	9%	10%	9%	3%	11%	4%	9%	11%	13%	4%	14%	3%	0%	9%	8%	10%	6%
Don't know/can't say	2%	3%	0%	2%	2%	0%	3%	0%	3%	1%	3%	0%	1%	0%	3%	0%	2%	2%	1%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	3%	3%	2%	3%	1%	3%	0%	3%	3%	0%	0%	6%	2%	3%	0%	2%	3%	3%	2%
Fairly poor value for money	24%	17%	27%	22%	24%	23%	26%	29%	18%	27%	26%	22%	23%	27%	26%	19%	26%	22%	28%	22%
Neither poor nor good value for money	39%	40%	35%	45%	38%	39%	42%	42%	43%	35%	33%	42%	41%	41%	47%	35%	28%	43%	34%	42%
Fairly good value for money	29%	34%	28%	28%	30%	32%	23%	25%	32%	28%	38%	30%	24%	23%	21%	46%	36%	26%	27%	30%
Very good value for money	4%	0%	7%	2%	4%	4%	3%	4%	2%	6%	2%	7%	5%	7%	0%	0%	6%	4%	6%	3%
Don't know/can't say	2%	6%	0%	1%	1%	1%	3%	0%	2%	2%	2%	0%	2%	0%	3%	0%	2%	2%	1%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

Q28b. VALUE FOR MONEY OF COMBINED SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	3%	3%	3%	3%	4%	1%	3%	2%	3%	3%	0%	2%	6%	2%	3%	8%	2%	2%	3%	2%
Fairly poor value for money	23%	17%	26%	20%	22%	22%	26%	25%	18%	26%	23%	22%	23%	27%	24%	15%	23%	22%	26%	21%
Neither poor nor good value for money	38%	37%	35%	42%	37%	38%	39%	42%	40%	33%	31%	38%	40%	39%	47%	27%	32%	40%	34%	40%
Fairly good value for money	31%	37%	30%	31%	32%	34%	26%	27%	33%	31%	43%	32%	25%	27%	24%	50%	34%	29%	30%	32%
Very good value for money	4%	0%	6%	3%	4%	4%	3%	4%	3%	5%	2%	7%	5%	5%	0%	0%	6%	5%	6%	3%
Don't know/can't say	2%	6%	0%	1%	1%	1%	3%	0%	2%	2%	2%	0%	2%	0%	3%	0%	2%	2%	1%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		Age	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Total water bill by 2014-15	3.17	3.18	3.16	3.20	3.20	3.28	2.99	3.20	3.15	3.17	3.36	3.28	3.04	3.23	3.03	3.23	3.24	3.15	3.13	3.20
Total sewerage bill by 2014-15	3.08	3.12	3.10	3.06	3.09	3.15	2.97	3.04	3.12	3.07	3.15	3.22	2.99	3.05	2.88	3.27	3.20	3.06	3.03	3.10
Total combined bill by 2014-15	3.11	3.15	3.11	3.11	3.11	3.19	3.00	3.05	3.15	3.10	3.23	3.20	3.00	3.05	2.94	3.19	3.20	3.13	3.08	3.12
No of respondents	254	33	110	97	90	91	67	55	90	103	59	60	105	44	33	26	45	100	87	161

Q29. ARE THERE ANY OTHER CHANGES TO THE COMPANY PLAN THAT YOU WOULD LIKE TO SEE MADE THAT HAVE NOT BEEN COVERED?

	Total
Reduce prices / charges	18%
Improve water appearance / colour / quality / taste	1%
Quicker response times	*%
Reduce number of leakages / increase repairs to pipes	*%
Improve the sewage system	1%
Generally take more responsibility	0%
Install water meters nationally	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Improve the water pressure	0%
Deal with the drainage problems/ flooding problems	*%
Give the option to install a water meter	*%
Be responsible for repairs to all pipes	0%
Have a fairer pricing / water charging scheme	*%
Increase in charges should be linked to improvements	1%
Service should be nationalized	*%
Improve water saving methods	0%
Water is too chalky / hard water / lime scale problems	1%
Improve level of service / customer service / customer information	4%
Protect nature / wildlife / environment	2%
Reduce money wastage (unspecified source)	0%
More frequent meter readings	0%
Plan should already be in action / already doing things like this	2%
Other	1%
None	67%
Don't know	6%
Refused	*%
No of respondents	254

**Please note: multiple responses were allowed in this question. Percentages show number of respondents giving an answer.

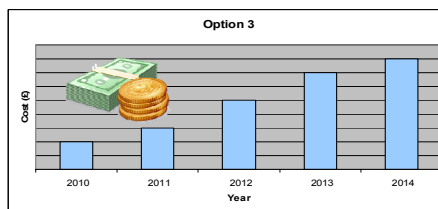
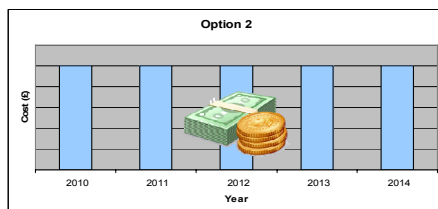
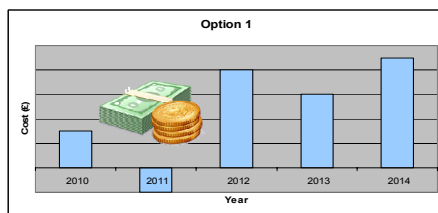
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	36%	37%	39%	32%	31%	39%	38%	31%	35%	39%	31%	23%	43%	39%	35%	50%	38%	30%	33%	37%
Ensure a reliable and continuous water supply	52%	60%	56%	45%	51%	50%	57%	45%	48%	59%	46%	52%	53%	55%	53%	54%	55%	49%	57%	49%
Ensure the safety of tap water – drinking water quality	75%	77%	77%	73%	73%	74%	80%	71%	73%	79%	70%	75%	77%	80%	74%	69%	74%	76%	72%	77%
Manage the appearance, taste and smell of tap water	38%	34%	44%	36%	42%	39%	32%	31%	45%	36%	43%	47%	33%	34%	21%	46%	30%	48%	40%	37%
Manage the pressure of water in your taps and the number of unplanned interruptions	9%	14%	10%	6%	11%	8%	7%	7%	5%	12%	7%	8%	10%	5%	18%	8%	15%	5%	11%	7%
Handle customers' accounts, queries, complaints and customers with special needs	8%	14%	8%	7%	9%	10%	6%	16%	3%	9%	13%	3%	9%	9%	12%	8%	6%	8%	7%	9%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	3%	2%	5%	3%	3%	4%	7%	3%	2%	5%	2%	4%	5%	6%	0%	4%	3%	6%	2%
Manage the amount of water taken from the environment to supply customers	7%	3%	8%	7%	10%	4%	6%	7%	9%	5%	8%	7%	6%	5%	12%	4%	13%	4%	7%	7%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	1%	3%	1%	1%	0%	2%	1%	2%	1%	1%	2%	2%	1%	2%	3%	0%	0%	1%	2%	1%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	0%	2%	4%	2%	2%	3%	2%	4%	1%	2%	2%	3%	2%	3%	4%	2%	2%	1%	3%
Avoid risk of homes being flooded with sewage	3%	0%	4%	4%	3%	4%	1%	2%	4%	3%	5%	3%	3%	2%	3%	12%	0%	3%	6%	2%
Avoid risk of properties being flooded with sewage outside the home	3%	0%	4%	4%	2%	4%	3%	2%	4%	3%	3%	5%	3%	7%	0%	8%	4%	1%	5%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	0%	3%	0%	2%	0%	1%	0%	1%	2%	0%	2%	2%	2%	0%	4%	0%	1%	1%	1%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	0%	3%	1%	4%	0%	0%	0%	2%	2%	2%	2%	2%	0%	0%	0%	4%	2%	1%	2%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	30%	31%	33%	29%	30%	29%	32%	27%	26%	36%	15%	13%	46%	39%	47%	27%	38%	18%	27%	32%
Bills show one big change in first year, then stay the same for the following four years	12%	11%	8%	16%	13%	10%	14%	20%	16%	5%	16%	13%	7%	16%	12%	12%	9%	13%	11%	13%
Bills change steadily every year, so that customers do not see big changes from year to year	57%	57%	59%	55%	57%	61%	54%	53%	59%	59%	69%	73%	46%	45%	41%	62%	53%	69%	61%	55%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	35	110	100	93	92	69	55	94	105	61	60	108	44	34	26	47	103	88	166



3.6 Other Company Information

GENDER

	Total
Male	45%
Female	55%
No of respondents	254

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	48%
Jointly responsible for household finances along with spouse/partner	44%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	2%
Payment through Council rent/social housing	3%
Other	0%
Refused	0%
No of respondents	254

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	33%
Employed Part-time (9-29 hours)	13%
Retired	39%
Not working and not looking for work	10%
Student	3%
Not working and looking for work	3%
Other	0%
Refused	*%
No of respondents	254

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	2%
B	7%
C	8%
D	8%
E	6%
F	5%
G	7%
H	2%
Don't know	56%
No of respondents	254

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	1%
Don't increase / should reduce charges	15%
Generally receive good level of service / happy with service	9%
Service is reliable	0%
Want a water meter installed	1%
Improve the waters appearance / colour / quality / taste	*%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	*%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	2%
Improve drainage system / solve problems with blockages	1%
Deal with hard water / lime scale problem	3%
Reduce bad smells	*%
Have special rates for certain customer groups (pensioners, families)	3%
Increase in charges should be linked to improvements	2%
Protect nature / wildlife / environment	1%
Plan should already be in action / already doing things like this	*%
Water company should be responsible for all areas of pipe network	*%
More frequent meter reading	0%
Improve level of service / customer service / customer information	4%
Reduce the number / there are too many chemicals added to water	*%
Reduce number of leakages / increase repairs to pipes	0%
Other	4%
None	55%
Don't know	3%
Refused	2%
No of respondents	254

**Please note: multiple responses were allowed in this question
Cambridge Water

1. Key Findings

Essex & Suffolk Water is a water company billing 699,200 properties for water services. Sewerage services for Essex & Suffolk Water are provided by Anglian Water / Thames Water.

Uninformed Views of Current and Future Services

91% of customers stated that they were **satisfied** with the services provided by Essex & Suffolk Water whereas 5% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (44%) and that there were no problems with the water service specifically (25%) and no problems with the service in general (22%). The main reasons that customers were dissatisfied was that it was too expensive already (46%), prices are always increasing (15%) and it was a poor/unreliable sewerage service (15%).

65% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (46%) and they valued the service (35%). 16% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (76%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Essex & Suffolk Water and Anglian Water / Thames Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 64% felt that the overall company plan was **acceptable**, 35% felt that it was **unacceptable**, and 2% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

64% of customers stated that the current water service was **good value for money**, 64% stated the current sewerage service was good value for money, and 60% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (39%) and they valued the service (39%).

23% of customers stated that the current water service was **poor value for money**, 22% stated the current sewerage service was poor value for money, and 21% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (85%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.44 for **water** services, 3.50 for **sewerage** services, and 3.42 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Essex & Suffolk Water's water and Anglian Water's / Thames Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

66% of customers felt that Essex & Suffolk Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (49%) and they valued the improvements (35%).

33% of customers felt that Essex & Suffolk Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reason being that it was too expensive already (65%).

65% of customers felt that Anglian Water's / Thames Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (51%) and they valued the improvements (33%).

32% of customers felt that Anglian Water's / Thames Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reason being that it was too expensive already (61%).

64% of customers felt that Essex & Suffolk Water's and Anglian Water's / Thames Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (53%) and they valued the improvements (35%).

33% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reason being that it was too expensive already (66%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.43 for Essex & Suffolk Water's **water** services, 3.37 for Anglian Water's / Thames Water's **sewerage** services, and 3.39 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 56% (water service), 53% (sewerage) and 53% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 27% (water service), 27% (sewerage service) and 27% (service overall).

Timing

69% of Essex & Suffolk Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year, whereas 18% would like to see bills change every year according to how much work water companies have to do.



2. Introduction

The attitudes and preferences of Essex & Suffolk Water's customers, reported in section 3, are based on a sample of 260. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis.

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	89%	96%	94%	80%	94%	85%	93%	90%	86%	92%	83%	89%	91%	92%	76%	94%	95%	89%	76%	92%
Transport	93%	96%	93%	92%	96%	93%	93%	95%	93%	93%	97%	89%	94%	95%	88%	94%	95%	93%	87%	95%
Health Services	97%	96%	98%	97%	100%	95%	99%	97%	97%	98%	97%	100%	97%	97%	93%	100%	100%	99%	98%	97%
Crime Prevention	98%	100%	98%	97%	98%	98%	99%	97%	100%	97%	97%	100%	98%	97%	98%	94%	100%	100%	98%	98%
Environment	97%	100%	97%	96%	100%	96%	95%	93%	97%	98%	97%	97%	97%	95%	93%	100%	98%	99%	93%	97%
Cost of Living	98%	100%	98%	98%	100%	98%	98%	97%	99%	98%	97%	100%	98%	98%	98%	94%	100%	99%	98%	98%
Immigration	79%	93%	80%	77%	81%	74%	84%	78%	79%	79%	67%	62%	84%	89%	68%	65%	73%	80%	55%	84%
Water and Sewerage Services	96%	100%	95%	95%	94%	94%	99%	97%	97%	94%	97%	97%	96%	97%	90%	88%	100%	97%	93%	96%
Utility Services	97%	100%	97%	96%	100%	94%	99%	97%	97%	97%	97%	100%	97%	95%	90%	100%	100%	100%	98%	97%
TOTAL	94%	98%	95%	92%	96%	92%	95%	93%	94%	94%	92%	93%	95%	95%	88%	92%	96%	95%	88%	95%
No of respondents	258	28	133	91	48	121	82	58	97	103	30	37	181	87	41	17	41	72	45	213

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	31%	25%	27%	38%	35%	32%	27%	24%	38%	28%	33%	30%	30%	26%	39%	29%	32%	32%	56%	26%
Improving air quality	47%	43%	47%	49%	46%	44%	52%	53%	45%	46%	57%	41%	47%	63%	24%	59%	54%	34%	27%	51%
Reducing climate change	51%	50%	47%	57%	42%	52%	55%	64%	51%	44%	67%	49%	49%	59%	46%	65%	51%	41%	44%	53%
More activity on nature conservation etc	10%	11%	10%	9%	6%	10%	12%	10%	13%	6%	10%	14%	9%	7%	24%	6%	2%	10%	18%	8%
Reducing litter and household waste	29%	29%	32%	23%	35%	26%	26%	24%	24%	36%	17%	35%	30%	19%	27%	24%	39%	37%	22%	30%
Improvements to tackling flooding	13%	7%	16%	12%	17%	13%	13%	12%	10%	17%	10%	11%	14%	9%	20%	6%	10%	19%	13%	13%
Encouraging people to use less water	5%	4%	5%	5%	2%	6%	6%	2%	4%	8%	3%	11%	4%	2%	7%	0%	5%	8%	4%	5%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	81%	71%	81%	83%	88%	79%	81%	81%	80%	82%	87%	84%	80%	83%	90%	71%	90%	70%	84%	80%
Removal and treatment of waste water	68%	54%	73%	68%	81%	64%	65%	69%	65%	70%	60%	70%	69%	66%	76%	53%	88%	59%	67%	68%
Dealing with sewer flooding	59%	39%	65%	57%	60%	57%	60%	64%	61%	53%	40%	57%	62%	61%	61%	59%	71%	48%	51%	60%
Maintaining pipes, treatment works, and other infrastructure	60%	43%	68%	54%	63%	60%	57%	59%	62%	58%	40%	59%	64%	57%	59%	65%	76%	55%	60%	60%
Protecting the water environment	55%	46%	59%	52%	65%	54%	49%	53%	55%	55%	43%	49%	59%	48%	54%	53%	71%	55%	60%	53%
Managing water pollution from agriculture and manufacturing	40%	46%	38%	42%	38%	43%	38%	37%	45%	38%	43%	38%	42%	33%	46%	35%	46%	44%	53%	38%
Drainage of roads	43%	29%	45%	47%	50%	41%	43%	47%	44%	41%	33%	41%	47%	42%	46%	47%	49%	40%	40%	44%
Reducing litter in waterways	48%	29%	51%	53%	60%	47%	44%	51%	50%	46%	30%	43%	54%	47%	46%	41%	59%	48%	47%	49%
Preventing flooding from rivers	43%	25%	43%	47%	44%	42%	42%	46%	44%	40%	53%	41%	42%	40%	39%	41%	51%	44%	53%	40%
Managing canal systems	38%	32%	37%	41%	42%	34%	42%	41%	39%	35%	37%	35%	40%	39%	39%	29%	39%	37%	33%	39%
Helping to reduce greenhouse gas emissions and tackle climate change	42%	36%	43%	44%	56%	34%	45%	46%	43%	39%	50%	41%	42%	47%	46%	47%	39%	34%	33%	44%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

Q12. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR APPROACH TO PAYING YOUR BILL/S?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't find it difficult to pay on time	76%	71%	78%	76%	80%	71%	80%	72%	78%	77%	79%	86%	73%	66%	65%	87%	92%	85%	82%	75%
I usually pay on time, but it can be difficult	16%	24%	13%	18%	9%	21%	13%	20%	14%	14%	17%	6%	17%	28%	20%	7%	0%	9%	13%	16%
I sometimes pay late depending on what other bills I have to pay	3%	0%	3%	3%	0%	4%	3%	4%	3%	2%	3%	3%	3%	1%	8%	7%	3%	2%	2%	3%
I often find it a challenge and have to delay payments as long as possible	2%	0%	3%	0%	9%	0%	1%	2%	2%	2%	0%	3%	2%	3%	3%	0%	3%	2%	0%	3%
I don't usually pay my bills on time	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	3%	5%	3%	2%	2%	4%	3%	2%	2%	4%	0%	3%	4%	3%	5%	0%	3%	3%	2%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	238	21	125	87	45	112	75	54	92	92	29	36	166	79	40	15	38	66	45	193

Please note this question was only asked to sole/joint responsibility bill payers.

Q13. HAVE YOU/HOUSEHOLD MEMBER CONTACTED YOUR WATER AND SEWERAGE COMPANY OTHER THAN TO PAY THE BILL?

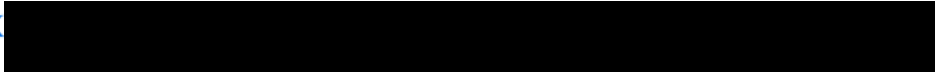
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	7%	4%	9%	3%	4%	6%	10%	7%	7%	6%	7%	3%	8%	1%	10%	18%	10%	4%	7%	7%
No	93%	96%	90%	97%	96%	93%	90%	93%	93%	93%	93%	97%	92%	99%	90%	82%	88%	19%	93%	93%
Don't know/can't say	0%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	2%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	23%	100%	100%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

Q14. WHAT WAS THE REASON FOR THE CONTACT?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
To make a complaint	29%	0%	23%	33%	0%	38%	25%	20%	14%	50%	0%	0%	36%	0%	25%	0%	25%	60%	0%	33%
General enquiry	29%	0%	31%	33%	50%	38%	13%	20%	43%	17%	0%	50%	29%	0%	25%	25%	50%	20%	67%	20%
Request information	24%	100%	23%	0%	50%	25%	13%	20%	29%	17%	0%	50%	21%	0%	0%	50%	25%	20%	0%	27%
To report a problem	18%	0%	15%	33%	0%	0%	38%	20%	14%	17%	50%	0%	14%	0%	50%	25%	0%	0%	33%	13%
To obtain a water meter	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Payment issue - not specified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a change of address	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To make an enquiry on the billing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	6%	0%	8%	0%	0%	0%	13%	20%	0%	0%	50%	0%	0%	100%	0%	0%	0%	0%	0%	7%
Can't remember	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	106%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	17	1	13	3	2	8	8	5	7	6	2	2	14	1	4	4	4	5	3	15

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	12%	0%	11%	14%	10%	13%	11%	10%	14%	11%	7%	16%	12%	9%	17%	0%	12%	15%	11%	12%
Unacceptable	23%	36%	22%	20%	23%	25%	18%	19%	22%	25%	3%	14%	28%	18%	27%	41%	32%	16%	36%	20%
Acceptable	62%	61%	62%	63%	58%	58%	70%	68%	59%	60%	83%	62%	58%	72%	51%	59%	49%	63%	49%	64%
Very acceptable	2%	0%	4%	0%	6%	2%	0%	0%	2%	3%	0%	8%	1%	0%	2%	0%	7%	1%	2%	2%
Don't know/can't say	2%	4%	1%	2%	2%	2%	1%	3%	2%	1%	7%	0%	1%	1%	2%	0%	0%	4%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215



3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - Risk of hosepipe ban no more than once every 20 years
	Ensure the safety of tap water - drinking water quality	99.99% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 541 customer complaints to water company about the taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	60 properties at risk of low water pressure at the tap. Supplies to 338 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.6% of billing enquiries answered within 5 days and 99.7% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls and no calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 1 site suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £159

Anglian Water

SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	422 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	389 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £197
	CURRENT AVERAGE TOTAL BILL = £356	

Thames Water

SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	2,630 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	3,673 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £111
		CURRENT AVERAGE TOTAL BILL = £270

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	4%	4%	3%	4%	4%	4%	4%	2%	5%	4%	0%	3%	5%	5%	10%	0%	2%	1%	0%	5%
Fairly poor value for money	19%	25%	19%	18%	17%	23%	15%	20%	18%	19%	7%	14%	22%	18%	20%	24%	17%	21%	24%	18%
Neither poor nor good value for money	11%	14%	11%	9%	6%	11%	13%	17%	10%	9%	3%	14%	12%	14%	10%	6%	10%	11%	11%	11%
Fairly good value for money	59%	54%	62%	58%	67%	58%	57%	47%	60%	65%	77%	57%	57%	59%	51%	65%	68%	58%	62%	59%
Very good value for money	5%	0%	4%	10%	4%	3%	10%	12%	5%	2%	10%	11%	4%	5%	7%	6%	2%	7%	2%	6%
Don't know/can't say	1%	4%	1%	1%	2%	1%	1%	2%	1%	1%	3%	3%	0%	0%	2%	0%	0%	3%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.44	3.22	3.45	3.51	3.51	3.33	3.54	3.48	3.42	3.42	3.93	3.61	3.32	3.41	3.28	3.53	3.51	3.49	3.42	3.44
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

Q17. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SEWERAGE SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	5%	4%	5%	3%	6%	5%	4%	2%	6%	5%	0%	3%	6%	3%	10%	6%	2%	4%	2%	5%
Fairly poor value for money	17%	21%	15%	19%	15%	20%	15%	20%	17%	16%	7%	14%	20%	18%	20%	18%	17%	15%	20%	17%
Neither poor nor good value for money	11%	18%	11%	9%	8%	12%	10%	15%	11%	9%	3%	16%	11%	11%	17%	6%	7%	11%	20%	9%
Fairly good value for money	53%	46%	57%	52%	60%	52%	52%	47%	50%	60%	60%	54%	52%	59%	32%	65%	66%	49%	44%	55%
Very good value for money	11%	7%	9%	16%	6%	8%	18%	12%	12%	10%	23%	11%	9%	8%	20%	6%	2%	16%	9%	12%
Don't know/can't say	2%	4%	3%	1%	4%	2%	1%	3%	3%	1%	7%	3%	1%	0%	2%	0%	5%	4%	4%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.50	3.33	3.51	3.59	3.48	3.40	3.66	3.49	3.46	3.55	4.07	3.58	3.40	3.50	3.33	3.47	3.51	3.61	3.40	3.53
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

Q18. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SERVICE OVERALL IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	4%	7%	3%	3%	4%	4%	4%	2%	5%	4%	0%	3%	5%	3%	10%	0%	0%	4%	0%	5%
Fairly poor value for money	17%	18%	17%	18%	15%	20%	15%	19%	17%	17%	3%	11%	21%	17%	22%	18%	17%	15%	22%	16%
Neither poor nor good value for money	17%	18%	17%	14%	15%	23%	10%	15%	19%	16%	7%	16%	19%	15%	24%	18%	20%	14%	31%	14%
Fairly good value for money	54%	46%	57%	55%	60%	48%	58%	53%	51%	58%	73%	59%	50%	61%	32%	59%	59%	55%	40%	57%
Very good value for money	6%	7%	5%	8%	4%	3%	11%	8%	5%	5%	13%	8%	4%	2%	10%	6%	2%	10%	4%	6%
Don't know/can't say	2%	4%	2%	2%	2%	2%	2%	3%	2%	1%	3%	3%	1%	1%	2%	0%	2%	3%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.42	3.30	3.44	3.46	3.47	3.27	3.59	3.49	3.34	3.44	4.00	3.61	3.29	3.43	3.10	3.53	3.48	3.52	3.27	3.45
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

Q18a. WHAT IS THE MAIN REASON THAT YOU FEEL YOUR CURRENT OVERALL SERVICE IS POOR VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the service	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Not worth the money	2%	0%	4%	0%	0%	3%	0%	0%	0%	5%	0%	0%	2%	0%	8%	0%	0%	0%	0%	2%
Too expensive already	85%	86%	77%	95%	78%	79%	100%	92%	95%	71%	100%	80%	85%	100%	85%	100%	86%	64%	90%	84%
Cannot afford it	4%	0%	8%	0%	11%	3%	0%	0%	0%	10%	0%	0%	4%	0%	0%	0%	14%	7%	0%	4%
Oppose paying so much for a natural resource	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Oppose paying so much to companies who make large profits	5%	14%	8%	0%	0%	10%	0%	0%	0%	14%	0%	0%	6%	0%	8%	0%	0%	14%	0%	7%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't have any problems / complaints about the service	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't have any choice / its a necessity	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	2%	0%	4%	0%	0%	3%	0%	0%	5%	0%	0%	0%	2%	0%	0%	0%	0%	7%	0%	2%
Don't know/can't say	2%	0%	0%	5%	11%	0%	0%	8%	0%	0%	0%	20%	0%	0%	0%	0%	0%	7%	10%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	55	7	26	20	9	29	16	12	22	21	1	5	47	18	13	3	7	14	10	45

Q18b. WHAT IS THE MAIN REASON THAT YOU FEEL YOUR CURRENT SERVICE OFFERS GOOD VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the service	39%	27%	45%	34%	42%	39%	38%	42%	33%	43%	38%	48%	37%	41%	24%	36%	60%	32%	25%	41%
Service is worth the money	12%	7%	12%	12%	29%	11%	3%	8%	16%	11%	15%	28%	8%	0%	24%	18%	28%	13%	20%	11%
Bill is affordable	39%	53%	33%	45%	19%	40%	48%	44%	42%	34%	31%	20%	47%	46%	41%	45%	8%	45%	35%	40%
I don't have any problems / complaints about the service	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't have any choice / its a necessity	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
It's less than my bill	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	8%	13%	7%	9%	6%	8%	10%	6%	7%	11%	12%	4%	7%	13%	12%	0%	0%	9%	15%	7%
Don't know/can't say	1%	0%	2%	0%	3%	2%	0%	0%	2%	2%	4%	0%	1%	0%	0%	0%	4%	2%	5%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	156	15	82	58	31	62	58	36	55	65	26	25	100	56	17	11	25	47	20	136

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	-£2
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - Risk of hosepipe ban no more than once every 20 years	Maintain current service	£15
	99.99% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£2
	Approximately 541 customer complaints to water company about the taste or smell of tap water each year	Reduce complaints about tap water	<50p
	60 properties at risk of low water pressure at the tap. Supplies to 338 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain current service, improving service where possible by working more effectively	£0
	99.6% of billing enquiries answered within 5 days and 99.7% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls and no calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	1 major asset better protected from severe weather plus a general programme including investigations to safeguarding service for all customers	<50p
	Fish and wildlife at 1 site suffer from (or are at risk of) low water levels caused by abstraction of water	1 investigation into reducing the amount of abstraction at 1 site; plus water levels at 1 site could be restored and protected enabling fish and wildlife to thrive	£0
WATER BILL - FROM £158 IN 2010 TO £177 IN 2014/5			£19

Anglian Water

SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service for these services and reduce smells from sewage treatment works	£3	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£3	
	422 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 149 properties at risk of internal flooding from sewers at least once in ten years	<50p	
	389 areas at risk of external flooding from sewers at least once in ten years	Reduce by 133 the areas at risk of external flooding from sewers at least once in ten years	<50p	
	Sewerage system could occasionally be disrupted e.g. by extreme events	367 assets better protected from severe weather safeguarding service for 2.8 million people	<50p	
	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 240km of river can better support fish and 330km can better support other wildlife: plus 8 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£3	
	SEWERAGE BILL - FROM £200 IN 2010 TO £209 IN 2014/5			£9
	TOTAL COMBINED BILL - FROM £358 IN 2010 TO £386 BY 2014/5			£28

SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	In addition to maintaining current service, reduce odour emissions at 8 sites	-£1
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£5
	2,630 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 1,411 properties at risk of internal flooding from sewers at least once in ten years	£3
	3,673 areas at risk of external flooding from sewers at least once in ten years	4,296 areas at risk of external flooding from sewers at least once in ten years	<50p
	Sewerage system could occasionally be disrupted e.g. by extreme events	28 sites better protected from severe weather (flooding) safeguarding service for 3 million people	<50p
	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 320km of river maintained or improved to better support fish and 120km to better support other wildlife. 1 lake restored and protected to support wildlife. Completion of the Lee Tunnel to halve sewage overflows to the Thames Tideway.	£13
	SEWERAGE BILL - FROM £113 IN 2010 TO £134 IN 2014/5		£22
TOTAL COMBINED BILL - FROM £271 IN 2010 TO £311 BY 2014/5		£41	

Q19. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN FOR WATER SERVICES AND THE IMPACTS ON YOUR WATER BILL?

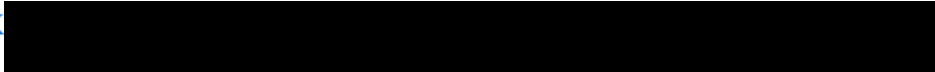
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	6%	4%	6%	4%	4%	7%	5%	5%	7%	5%	7%	11%	5%	2%	12%	0%	5%	8%	4%	6%
Unacceptable	27%	32%	23%	31%	27%	28%	23%	29%	29%	23%	7%	24%	31%	26%	34%	41%	22%	22%	36%	25%
Acceptable	63%	57%	66%	61%	65%	60%	67%	64%	60%	64%	83%	57%	61%	68%	49%	53%	68%	63%	53%	65%
Very acceptable	3%	4%	5%	2%	2%	3%	5%	0%	3%	6%	3%	5%	3%	1%	5%	6%	2%	5%	4%	3%
Don't know/can't say	2%	4%	1%	1%	2%	1%	1%	2%	1%	2%	0%	3%	1%	2%	0%	0%	2%	1%	2%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215

Q20. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	4%	0%	5%	0%	7%	2%	4%	0%	6%	3%	0%	15%	2%	0%	0%	0%	9%	9%	0%	5%
Improvements not worth the money	5%	0%	8%	3%	7%	5%	0%	0%	3%	10%	0%	0%	6%	0%	0%	0%	18%	9%	6%	5%
Too expensive already	65%	60%	61%	73%	60%	58%	87%	80%	69%	52%	50%	46%	69%	92%	74%	71%	45%	36%	78%	62%
Cannot afford it	12%	30%	11%	9%	13%	14%	9%	5%	11%	17%	25%	15%	11%	8%	16%	14%	18%	9%	11%	12%
Oppose paying more for a natural resource	1%	10%	0%	0%	0%	2%	0%	0%	0%	3%	0%	0%	2%	0%	5%	0%	0%	0%	0%	2%
Oppose paying more to companies who make large profits	8%	0%	8%	12%	13%	9%	0%	5%	9%	10%	25%	23%	5%	0%	0%	0%	9%	27%	0%	11%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
This should be done as a matter of course	1%	0%	3%	0%	0%	2%	0%	0%	0%	3%	0%	0%	2%	0%	0%	0%	0%	5%	0%	2%
Other	1%	0%	3%	0%	0%	2%	0%	5%	0%	0%	0%	0%	2%	0%	0%	14%	0%	0%	0%	2%
Don't know/can't say	2%	0%	3%	3%	0%	5%	0%	5%	3%	0%	0%	0%	3%	0%	5%	0%	0%	5%	6%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	84	10	38	33	15	43	23	20	35	29	4	13	65	25	19	7	11	22	18	66

Q21. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	35%	35%	36%	34%	41%	30%	38%	39%	29%	38%	35%	48%	32%	41%	23%	30%	48%	26%	19%	38%
Improvements are worth the money	11%	6%	13%	10%	13%	17%	3%	11%	15%	8%	19%	17%	8%	2%	14%	20%	14%	18%	19%	10%
Plan is affordable	49%	59%	45%	53%	38%	49%	57%	45%	55%	47%	38%	30%	56%	56%	59%	30%	31%	52%	58%	48%
Everything/Prices are going up	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Have no choice but to pay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	0%	1%	0%	3%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	2%	0%	1%
Don't know/can't say	4%	0%	5%	3%	6%	4%	2%	5%	2%	6%	8%	4%	3%	2%	5%	20%	7%	2%	4%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	172	17	94	59	32	77	60	38	62	72	26	23	117	61	22	10	29	50	26	146


Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	35%	18%	40%	34%	41%	37%	29%	38%	36%	33%	32%	48%	33%	35%	25%	20%	56%	31%	26%	37%
Improvements are worth the money	8%	6%	9%	7%	10%	8%	7%	11%	3%	10%	12%	17%	5%	5%	20%	20%	8%	4%	13%	7%
Plan is affordable	53%	71%	47%	54%	41%	52%	60%	46%	57%	52%	44%	30%	59%	58%	55%	50%	32%	56%	57%	52%
Other	1%	0%	1%	0%	3%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	2%	0%	1%
Don't know/can't say	4%	6%	2%	5%	3%	3%	3%	5%	3%	3%	12%	4%	1%	2%	0%	10%	4%	6%	4%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	165	17	85	61	29	75	58	37	61	67	25	23	111	62	20	10	25	48	23	142

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	5%	15%	16%	35%	27%	2%	260
Ensure a reliable and continuous water supply	3%	12%	22%	33%	28%	2%	260
Ensure the safety of tap water - drinking water quality	4%	13%	18%	34%	30%	1%	260
Manage the appearance, taste and smell of tap water	3%	13%	22%	33%	29%	0%	260
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	15%	21%	34%	27%	1%	260
Handle customers' accounts, queries, complaints and customers with special needs	3%	13%	23%	37%	23%	1%	260
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3%	16%	24%	34%	22%	2%	260
Manage the amount of water taken from the environment to supply customers	2%	18%	20%	35%	25%	1%	260
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	15%	25%	33%	24%	1%	260
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3%	13%	21%	37%	25%	1%	260
Avoid risk of homes being flooded with sewage	3%	15%	19%	38%	24%	1%	260
Avoid risk of properties being flooded with sewage outside the home	2%	15%	22%	37%	24%	1%	260
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3%	15%	22%	37%	21%	2%	260
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	13%	23%	40%	22%	0%	260
TOTAL	3%	14%	21%	36%	25%	1%	260

Q29. ARE THERE ANY OTHER CHANGES TO THE COMPANY PLAN THAT YOU WOULD LIKE TO SEE MADE THAT HAVE NOT BEEN COVERED?

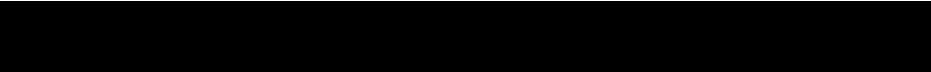
	Total
Reduce prices / charges	2%
Improve water appearance / colour / quality / taste	1%
Quicker response times	0%
Reduce number of leakages / increase repairs to pipes	1%
Improve the sewage system	0%
Generally take more responsibility	0%
Install water meters nationally	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Improve the water pressure	0%
Deal with the drainage problems/ flooding problems	0%
Give the option to install a water meter	0%
Be responsible for repairs to all pipes	0%
Have a fairer pricing / water charging scheme	0%
Increase in charges should be linked to improvements	0%
Service should be nationalized	0%
Improve water saving methods	0%
Water is too chalky / hard water / lime scale problems	0%
Improve level of service / customer service / customer information	0%
Protect nature / wildlife / environment	0%
Reduce money wastage (unspecified source)	0%
More frequent meter readings	0%
Plan should already be in action / already doing things like this	0%
Other	70%
None	20%
Don't know	5%
Refused	0%
No of respondents	260

**Please note: multiple responses were allowed in this question. Percentages show number of respondents giving an answer.

Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

(multiple response question)

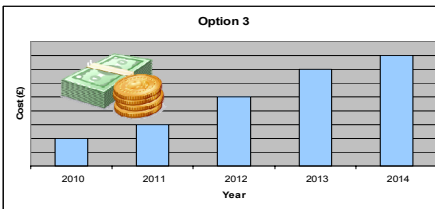
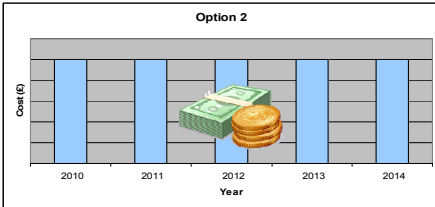
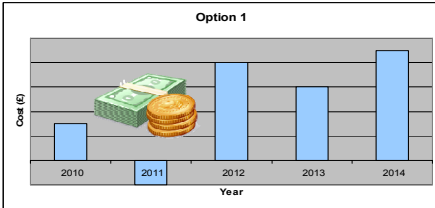
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	29%	36%	29%	29%	29%	30%	27%	39%	29%	24%	17%	27%	32%	28%	37%	47%	29%	22%	38%	27%
Ensure a reliable and continuous water supply	58%	64%	57%	59%	58%	60%	54%	61%	48%	65%	43%	51%	61%	61%	61%	76%	46%	53%	51%	59%
Ensure the safety of tap water – drinking water quality	85%	89%	85%	86%	85%	83%	88%	85%	82%	89%	93%	76%	86%	85%	95%	88%	78%	84%	82%	86%
Manage the appearance, taste and smell of tap water	52%	54%	48%	58%	46%	50%	61%	49%	55%	50%	47%	51%	52%	60%	44%	65%	37%	52%	42%	54%
Manage the pressure of water in your taps and the number of unplanned interruptions	9%	11%	8%	10%	8%	9%	8%	5%	14%	6%	3%	11%	9%	10%	2%	6%	7%	12%	7%	9%
Handle customers' accounts, queries, complaints and customers with special needs	3%	4%	3%	3%	2%	3%	4%	3%	3%	3%	3%	3%	3%	1%	7%	0%	2%	4%	7%	2%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	0%	2%	2%	0%	3%	0%	2%	3%	0%	0%	5%	1%	1%	2%	0%	5%	0%	4%	1%
Manage the amount of water taken from the environment to supply customers	1%	0%	2%	0%	2%	1%	1%	0%	2%	1%	0%	5%	1%	1%	0%	0%	2%	1%	2%	1%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	4%	7%	5%	6%	5%	7%	5%	5%	7%	7%	5%	6%	6%	5%	6%	10%	4%	4%	6%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	10%	14%	8%	11%	8%	9%	11%	10%	12%	7%	23%	11%	7%	11%	10%	6%	7%	10%	2%	11%
Avoid risk of homes being flooded with sewage	10%	7%	12%	8%	17%	7%	8%	12%	6%	12%	10%	8%	10%	10%	2%	6%	17%	10%	0%	12%
Avoid risk of properties being flooded with sewage outside the home	0%	4%	0%	0%	2%	0%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	2%	0%	0%	0%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	0%	1%	1%	2%	0%	0%	0%	1%	1%	0%	0%	1%	0%	0%	0%	2%	1%	0%	1%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215



3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	18%	18%	17%	20%	17%	21%	14%	24%	20%	13%	13%	11%	20%	20%	29%	12%	15%	12%	36%	14%
Bills show one big change in first year, then stay the same for the following four years	13%	7%	13%	14%	13%	12%	14%	14%	14%	11%	20%	8%	13%	13%	5%	18%	15%	15%	11%	13%
Bills change steadily every year, so that customers do not see big changes from year to year	69%	75%	71%	66%	71%	66%	71%	63%	65%	77%	67%	81%	67%	67%	66%	71%	71%	73%	53%	73%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	260	28	133	93	48	121	84	59	98	103	30	37	183	88	41	17	41	73	45	215



3.6 Other Company Information

GENDER

	Total
Male	47%
Female	53%
No of respondents	260

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	53%
Jointly responsible for household finances along with spouse/partner	38%
Contributor to shared household expenses (e.g. house/flatmate, parents)	3%
Payment through private rent	2%
Payment through Council rent/social housing	4%
Other	0%
Refused	0%
No of respondents	260

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	35%
Employed Part-time (9-29 hours)	13%
Retired	33%
Not working and not looking for work	8%
Student	3%
Not working and looking for work	7%
Other	2%
Refused	0%
No of respondents	260

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	7%
B	9%
C	21%
D	16%
E	5%
F	1%
G	0%
H	0%
Don't know	42%
No of respondents	260

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	0%
Don't increase / should reduce charges	0%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	0%
Have difficulty paying water bill with limited income / pension	1%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	70%
None	25%
Don't know	3%
Refused	0%
No of respondents	260

**Please note: multiple responses were allowed in this question
Essex and Suffolk Water

1. Key Findings

Folkestone & Dover Water is a water company billing 67,000 properties for water services. Sewerage services for Folkestone & Dover Water are provided by Southern Water.

Uninformed Views of Current and Future Services

84% of customers stated that they were **satisfied** with the services provided by Folkestone & Dover Water, whereas 8% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (40%), there were no problems with the service (21%) and 20% stated they did not know why they were satisfied with the services provided. 58% of customers stated that they did not know the main reason that they were dissatisfied and 21% said that it was too expensive already.

54% of customers stated that the current water and sewerage service was good **value for money**, the main reason being that the bill was affordable (63%). 29% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (83%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Folkestone & Dover Water and Southern Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 41% felt that the overall company plan was **acceptable**, 52% felt that it was **unacceptable**, and 7% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

49% of customers stated that the current water service was **good value for money**, 48% stated the current sewerage service (provided by Southern Water) was good value for money, and 48% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money was that the bill was affordable (55%) and they valued the service (19%).

21% of customers stated that the current water service was **poor value for money**, 24% stated the current sewerage service was poor value for money, and 23% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (81%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.34 for **water** services, 3.32 for **sewerage** services, and 3.31 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Folkestone & Dover Water's water and Southern Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

45% of customers felt that Folkestone & Dover Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (54%), they valued the improvements (13%) and the improvements are worth the money (12%).

49% of customers felt that Folkestone & Dover Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reason being that it was too expensive already (73%).

43% of customers felt that Southern Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (50%), don't know (20%) and they valued the improvements (18%).

51% of customers felt that Southern Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reason being that it was too expensive already (73%).

43% of customers felt that Folkestone & Dover Water's and Southern Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (47%) and they valued the improvements (19%).

50% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reason being that it was too expensive already (73%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 2.69 for Folkestone & Dover Water's **water** services, 2.65 for Southern Water's **sewerage** services, and 2.68 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 27% (water service), 28% (sewerage) and 29% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 50% (water service), 50% (sewerage service) and 48% (service overall).

Timing

85% of Folkestone & Dover Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

2. Introduction

The attitudes and preferences of Folkstone & Dover Water's customers, reported in section 3, are based on a sample of 253. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis.

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	86%	97%	91%	78%	95%	89%	78%	87%	82%	91%	88%	84%	85%	95%	95%	90%	88%	73%	83%	87%
Transport	85%	93%	88%	79%	85%	88%	80%	85%	79%	93%	86%	82%	86%	95%	95%	90%	86%	71%	79%	86%
Health Services	89%	100%	89%	86%	88%	89%	91%	91%	86%	91%	92%	82%	91%	93%	98%	100%	82%	85%	79%	92%
Crime Prevention	87%	100%	83%	87%	88%	90%	84%	88%	86%	88%	94%	85%	86%	95%	95%	90%	84%	80%	85%	88%
Environment	90%	97%	89%	89%	85%	93%	89%	85%	95%	88%	92%	92%	88%	91%	95%	95%	84%	89%	89%	90%
Cost of Living	95%	100%	94%	95%	93%	96%	95%	96%	94%	96%	94%	95%	95%	95%	100%	95%	94%	94%	91%	96%
Immigration	73%	79%	71%	73%	85%	76%	64%	76%	69%	76%	74%	67%	75%	73%	74%	70%	78%	71%	66%	75%
Water and Sewerage Services	96%	100%	93%	97%	95%	95%	97%	100%	94%	94%	96%	95%	95%	100%	100%	100%	90%	93%	89%	97%
Utility Services	96%	97%	96%	96%	95%	97%	97%	97%	96%	96%	94%	97%	97%	96%	98%	100%	94%	96%	89%	98%
TOTAL	89%	96%	88%	87%	90%	90%	86%	90%	87%	90%	90%	87%	89%	92%	94%	92%	86%	84%	83%	90%
No of respondents	250	29	109	109	40	124	86	67	103	80	50	61	131	56	42	20	49	83	47	203

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	27%	31%	27%	25%	20%	27%	29%	21%	27%	31%	31%	20%	26%	25%	33%	45%	22%	23%	17%	29%
Improving air quality	16%	24%	17%	13%	8%	19%	15%	16%	17%	14%	8%	11%	20%	20%	36%	10%	12%	7%	9%	17%
Reducing climate change	38%	31%	37%	40%	38%	42%	31%	37%	45%	29%	41%	36%	38%	39%	36%	45%	45%	31%	51%	34%
More activity on nature conservation etc.	24%	41%	21%	22%	23%	21%	28%	26%	25%	20%	33%	21%	22%	32%	26%	15%	14%	24%	23%	24%
Reducing litter and household waste	33%	48%	34%	29%	38%	36%	26%	37%	22%	43%	27%	43%	32%	34%	31%	40%	37%	29%	43%	31%
Improvements to tackling flooding	11%	0%	11%	13%	10%	13%	8%	10%	15%	6%	10%	11%	11%	16%	14%	5%	8%	8%	11%	11%
Encouraging people to use less water	15%	10%	16%	14%	13%	11%	20%	14%	11%	20%	20%	11%	14%	25%	12%	30%	10%	8%	11%	16%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	87%	93%	83%	90%	85%	88%	88%	90%	83%	90%	80%	95%	88%	95%	86%	90%	90%	81%	89%	87%
Removal and treatment of waste water	71%	76%	64%	76%	75%	71%	69%	73%	71%	69%	78%	64%	72%	84%	76%	80%	63%	62%	64%	72%
Dealing with sewer flooding	47%	41%	50%	47%	45%	48%	47%	43%	49%	49%	49%	41%	50%	64%	40%	60%	41%	40%	49%	47%
Maintaining pipes, treatment works, and other infrastructure	54%	48%	56%	54%	60%	56%	47%	49%	56%	55%	49%	51%	56%	68%	52%	65%	55%	42%	43%	56%
Protecting the water environment	46%	41%	48%	46%	50%	47%	43%	43%	49%	45%	45%	41%	47%	59%	52%	65%	39%	34%	47%	46%
Managing water pollution from agriculture and manufacturing	37%	31%	35%	41%	40%	44%	27%	34%	41%	35%	33%	34%	39%	50%	48%	45%	27%	28%	38%	37%
Drainage of roads	36%	48%	33%	37%	30%	41%	31%	33%	40%	34%	29%	36%	40%	57%	38%	50%	29%	22%	32%	37%
Reducing litter in waterways	45%	41%	43%	47%	45%	50%	38%	40%	50%	44%	47%	34%	48%	57%	50%	60%	41%	34%	40%	46%
Preventing flooding from rivers	44%	55%	41%	45%	38%	48%	42%	47%	42%	45%	45%	43%	45%	61%	48%	65%	35%	33%	45%	44%
Managing canal systems	29%	45%	28%	27%	38%	31%	24%	27%	33%	26%	33%	26%	30%	39%	26%	40%	27%	23%	32%	29%
Helping to reduce greenhouse gas emissions and tackle climate change	39%	48%	34%	43%	45%	43%	31%	40%	40%	38%	33%	33%	45%	61%	40%	45%	37%	24%	38%	39%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

Q12. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR APPROACH TO PAYING YOUR BILL/S?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't find it difficult to pay on time	85%	60%	87%	88%	98%	88%	74%	91%	83%	81%	98%	85%	80%	81%	81%	90%	96%	82%	93%	83%
I usually pay on time, but it can be difficult	11%	28%	8%	9%	3%	6%	21%	6%	11%	15%	2%	10%	14%	11%	12%	10%	4%	13%	4%	12%
I sometimes pay late depending on what other bills I have to pay	3%	12%	5%	0%	0%	4%	4%	3%	3%	4%	0%	5%	4%	6%	7%	0%	0%	2%	2%	4%
I often find it a challenge and have to delay payments as long as possible	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't usually pay my bills on time	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	1%	0%	0%	3%	0%	2%	1%	0%	3%	0%	0%	0%	2%	2%	0%	0%	0%	2%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	244	25	106	110	40	119	85	68	101	75	50	60	128	53	42	20	47	82	46	198

Please note this question was only asked to sole/joint responsibility bill payers.

Q13. HAVE YOU/HOUSEHOLD MEMBER CONTACTED YOUR WATER AND SEWERAGE COMPANY OTHER THAN TO PAY THE BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	13%	7%	16%	13%	13%	14%	13%	16%	15%	10%	22%	10%	12%	9%	14%	25%	14%	6%	15%	13%
No	85%	93%	82%	86%	85%	85%	85%	81%	84%	89%	76%	87%	88%	91%	86%	75%	86%	17%	85%	85%
Don't know/can't say	2%	0%	3%	1%	3%	2%	1%	3%	1%	1%	2%	3%	0%	0%	0%	0%	0%	0%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	23%	100%	100%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

Q14. WHAT WAS THE REASON FOR THE CONTACT?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
To make a complaint	32%	100%	32%	19%	40%	22%	36%	25%	38%	22%	38%	17%	29%	20%	33%	17%	50%	25%	14%	33%
General enquiry	59%	0%	47%	69%	40%	61%	50%	67%	38%	67%	46%	67%	59%	40%	33%	83%	38%	67%	57%	53%
Request information	3%	0%	5%	0%	0%	6%	0%	0%	6%	0%	0%	0%	6%	0%	0%	0%	13%	0%	14%	0%
To report a problem	15%	0%	16%	13%	20%	11%	14%	8%	19%	11%	15%	17%	6%	40%	33%	0%	0%	8%	14%	13%
To obtain a water meter	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Payment issue - not specified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a change of address	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To make an enquiry on the billing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Can't remember	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	109%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	34	2	19	16	5	18	14	12	16	9	13	6	17	5	6	6	8	12	7	30

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	18%	21%	16%	19%	18%	17%	19%	23%	18%	13%	14%	18%	20%	27%	31%	15%	10%	10%	17%	18%
Unacceptable	34%	38%	33%	34%	23%	33%	42%	36%	37%	30%	35%	25%	38%	38%	36%	30%	22%	40%	30%	35%
Acceptable	38%	34%	43%	36%	53%	40%	29%	36%	35%	45%	45%	52%	30%	29%	29%	50%	55%	37%	45%	37%
Very acceptable	3%	3%	4%	2%	0%	5%	1%	1%	3%	4%	0%	2%	4%	5%	2%	0%	6%	0%	4%	2%
Don't know/can't say	7%	3%	5%	10%	8%	5%	9%	4%	7%	9%	6%	3%	8%	2%	2%	5%	6%	13%	4%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years
	Ensure the safety of tap water - drinking water quality	100% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 285 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	2 properties at risk of low water pressure at the tap. Supplies to no properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.8% of billing enquiries answered within 5 days and 99.3% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 0 sites suffer from low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £167
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	251 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	2,841 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £222
	CURRENT AVERAGE TOTAL BILL = £389	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	0%	4%	1%	0%	2%	2%	6%	0%	1%	0%	2%	3%	4%	2%	5%	0%	1%	2%	2%
Fairly poor value for money	19%	34%	22%	13%	18%	22%	17%	16%	22%	19%	18%	20%	20%	16%	36%	10%	14%	19%	19%	19%
Neither poor nor good value for money	23%	21%	22%	24%	20%	22%	27%	27%	21%	23%	25%	26%	22%	39%	14%	15%	24%	19%	32%	21%
Fairly good value for money	43%	34%	43%	46%	43%	44%	40%	44%	38%	48%	49%	41%	42%	29%	38%	60%	51%	45%	34%	45%
Very good value for money	6%	3%	5%	9%	13%	6%	4%	6%	9%	4%	6%	5%	7%	7%	10%	5%	6%	5%	9%	6%
Don't know/can't say	6%	7%	5%	8%	8%	4%	9%	1%	10%	6%	2%	7%	7%	5%	0%	5%	4%	12%	4%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.34	3.07	3.24	3.53	3.54	3.30	3.31	3.29	3.37	3.36	3.44	3.30	3.32	3.21	3.17	3.53	3.51	3.38	3.29	3.35
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain and repair water pipes and equipment to maintain current supplies and quality of drinking water	-£5
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years	Maintain current service	£26
	100% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£18
	Approximately 285 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0
	2 properties at risk of low water pressure at the tap. Supplies to no properties affected by unplanned interruptions lasting more than 12 hrs	Maintain current service	£0
	99.8% of billing enquiries answered within 5 days and 99.3% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	6 assets better protected from severe weather safeguarding service for 12,362 people	£0
	Fish and wildlife at 0 sites suffer from low water levels caused by abstraction of water	Reduce amount of abstraction at 0 sites; plus water levels at 0 sites will be restored and protected enabling fish and wildlife to thrive	£0
WATER BILL - FROM £168 IN 2010 TO £205 IN 2014/5			£36
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	£23
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£0
	251 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 141 properties at risk of internal flooding from sewers at least once in ten years	£6
	2,841 areas at risk of external flooding from sewers at least once in ten years	4,560 areas at risk of external flooding from sewers at least once in ten years	£2
	Sewerage system could occasionally be disrupted e.g. by extreme events	Maintain current service	£0
	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 290km of river can better support fish and 320km can better support other wildlife: plus 1 wetland and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£33
	SEWERAGE BILL - FROM £230 IN 2010 TO £281 IN 2014/5		
TOTAL COMBINED BILL - FROM £398 IN 2010 TO £486 BY 2014/5			£86

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	18%	18%	12%	23%	29%	17%	8%	11%	25%	15%	26%	16%	16%	22%	7%	8%	14%	27%	25%	16%
Improvements are worth the money	13%	36%	14%	6%	17%	10%	17%	26%	0%	18%	22%	9%	10%	17%	7%	25%	14%	9%	10%	14%
Plan is affordable	50%	36%	55%	47%	42%	51%	54%	41%	50%	55%	35%	63%	47%	17%	60%	33%	62%	58%	45%	51%
Have no choice but to pay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	20%	9%	18%	23%	13%	22%	21%	22%	25%	13%	17%	13%	27%	44%	27%	33%	10%	6%	20%	20%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	107	11	49	47	24	59	24	27	40	40	23	32	49	18	15	12	29	33	20	87

Q25. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN AS A WHOLE AND THE IMPACT ON YOUR OVERALL BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	13%	14%	13%	13%	13%	15%	12%	14%	17%	9%	12%	11%	15%	23%	19%	10%	6%	9%	6%	15%
Unacceptable	37%	38%	35%	38%	23%	34%	47%	44%	38%	29%	35%	28%	42%	41%	45%	25%	27%	38%	45%	35%
Acceptable	42%	38%	46%	39%	60%	44%	30%	37%	37%	51%	43%	56%	35%	30%	29%	60%	61%	40%	43%	41%
Very acceptable	1%	0%	1%	2%	0%	2%	0%	1%	2%	0%	2%	2%	1%	2%	5%	0%	0%	0%	4%	0%
Don't know/can't say	7%	10%	6%	8%	5%	6%	10%	3%	7%	11%	8%	3%	8%	4%	2%	5%	6%	13%	2%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

Q26. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	3%	0%	6%	0%	7%	5%	0%	2%	2%	7%	4%	0%	4%	0%	0%	14%	6%	5%	0%	4%
Improvements not worth the money	6%	13%	6%	5%	14%	8%	2%	5%	7%	7%	8%	8%	5%	8%	4%	0%	19%	2%	4%	7%
Too expensive already	73%	73%	77%	70%	64%	77%	72%	71%	75%	73%	71%	83%	70%	72%	85%	71%	50%	76%	83%	71%
Cannot afford it	13%	7%	4%	23%	7%	5%	23%	20%	11%	7%	13%	4%	16%	17%	11%	0%	13%	12%	4%	15%
Oppose paying more for a natural resource	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Oppose paying more to companies who make large profits	2%	0%	6%	0%	0%	3%	2%	0%	5%	0%	0%	0%	4%	3%	0%	0%	13%	0%	4%	2%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	2%	7%	2%	2%	7%	2%	2%	2%	0%	7%	4%	4%	1%	0%	0%	14%	0%	5%	4%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	127	15	52	57	14	60	53	41	56	30	24	24	76	36	27	7	16	41	24	103

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	19%	36%	14%	20%	17%	21%	15%	19%	25%	12%	9%	23%	21%	33%	14%	0%	13%	24%	14%	20%
Improvements are worth the money	17%	27%	20%	11%	17%	18%	15%	19%	10%	22%	26%	11%	15%	17%	14%	17%	17%	18%	18%	16%
Plan is affordable	47%	36%	47%	50%	50%	47%	44%	41%	48%	51%	57%	51%	38%	22%	57%	42%	57%	50%	50%	47%
Other	1%	0%	2%	0%	0%	0%	4%	0%	0%	2%	0%	3%	0%	0%	0%	8%	0%	0%	0%	1%
Don't know/can't say	17%	0%	18%	20%	17%	14%	22%	22%	18%	12%	9%	11%	26%	28%	14%	33%	13%	9%	18%	16%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	108	11	51	46	24	57	27	27	40	41	23	35	47	18	14	12	30	34	22	86

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	1%	9%	19%	51%	18%	2%	253
Ensure a reliable and continuous water supply	1%	9%	23%	40%	26%	1%	253
Ensure the safety of tap water – drinking water quality	2%	11%	21%	49%	16%	1%	253
Manage the appearance, taste and smell of tap water	1%	10%	29%	37%	22%	1%	253
Manage the pressure of water in your taps and the number of unplanned interruptions	1%	10%	26%	43%	19%	*%	253
Handle customers' accounts, queries, complaints and customers with special needs	2%	11%	30%	36%	20%	1%	253
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	14%	30%	36%	18%	*%	253
Manage the amount of water taken from the environment to supply customers	2%	12%	30%	37%	18%	*%	253
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	11%	29%	38%	20%	*%	253
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	11%	26%	36%	24%	1%	253
Avoid risk of homes being flooded with sewage	2%	9%	29%	39%	21%	*%	253
Avoid risk of properties being flooded with sewage outside the home	1%	11%	26%	40%	22%	*%	253
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	13%	30%	35%	19%	1%	253
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	9%	31%	34%	23%	*%	253
TOTAL	2%	11%	27%	39%	20%	1%	253

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.77	3.90	3.81	3.73	3.85	3.79	3.72	3.69	3.79	3.82	3.73	3.82	3.74	3.82	3.81	3.50	3.85	3.75	3.76	3.78
Ensure a reliable and continuous water supply	3.80	3.96	3.86	3.72	3.80	3.88	3.70	3.62	3.85	3.90	3.80	3.83	3.75	3.77	3.88	3.80	3.84	3.77	3.81	3.80
Ensure the safety of tap water – drinking water quality	3.68	3.72	3.67	3.70	3.70	3.73	3.60	3.54	3.75	3.72	3.68	3.62	3.66	3.64	3.71	3.45	3.80	3.69	3.83	3.65
Manage the appearance, taste and smell of tap water	3.70	3.93	3.61	3.74	3.68	3.73	3.67	3.55	3.80	3.70	3.66	3.67	3.68	3.66	3.81	3.60	3.63	3.73	3.72	3.69
Manage the pressure of water in your taps and the number of unplanned interruptions	3.69	3.89	3.56	3.78	3.70	3.72	3.65	3.76	3.71	3.61	3.69	3.58	3.74	3.75	3.76	3.65	3.55	3.71	3.55	3.72
Handle customers' accounts, queries, complaints and customers with special needs	3.62	3.55	3.56	3.71	3.43	3.72	3.55	3.64	3.59	3.63	3.68	3.57	3.62	3.75	3.52	3.60	3.50	3.64	3.67	3.60
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.54	3.50	3.58	3.52	3.55	3.67	3.36	3.50	3.51	3.61	3.72	3.54	3.46	3.54	3.74	3.05	3.73	3.45	3.70	3.50
Manage the amount of water taken from the environment to supply customers	3.58	3.69	3.55	3.59	3.68	3.60	3.50	3.60	3.53	3.63	3.78	3.46	3.55	3.66	3.55	3.45	3.63	3.54	3.51	3.60
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.62	3.86	3.55	3.62	3.55	3.64	3.61	3.61	3.59	3.65	3.66	3.52	3.62	3.68	3.64	3.50	3.67	3.55	3.62	3.61
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.69	3.93	3.70	3.64	3.63	3.73	3.67	3.68	3.60	3.82	3.88	3.54	3.68	3.86	3.67	3.20	3.73	3.69	3.64	3.71
Avoid risk of homes being flooded with sewage	3.69	3.82	3.67	3.68	3.65	3.70	3.70	3.70	3.68	3.70	3.75	3.62	3.69	3.80	3.74	3.50	3.61	3.68	3.66	3.70
Avoid risk of properties being flooded with sewage outside the home	3.70	4.07	3.55	3.77	3.68	3.73	3.66	3.79	3.68	3.65	3.82	3.51	3.73	3.95	3.69	3.35	3.55	3.71	3.60	3.72
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.59	3.64	3.48	3.68	3.55	3.64	3.52	3.64	3.62	3.49	3.78	3.38	3.60	3.80	3.62	3.35	3.47	3.55	3.49	3.61
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.67	3.93	3.60	3.68	3.45	3.76	3.64	3.78	3.60	3.65	3.80	3.54	3.66	3.82	3.69	3.45	3.65	3.61	3.60	3.68
TOTAL	3.67	3.81	3.62	3.68	3.63	3.72	3.61	3.65	3.67	3.68	3.75	3.59	3.66	3.75	3.70	3.46	3.66	3.65	3.65	3.67
No of respondents	253	29	108	108	40	123	85	68	101	79	49	61	131	55	42	20	48	83	46	202

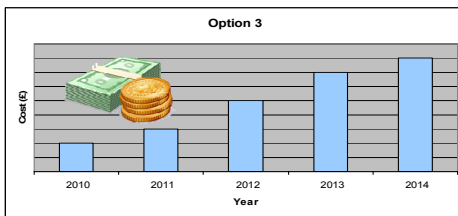
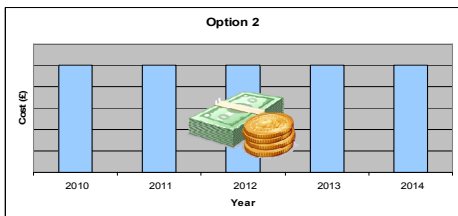
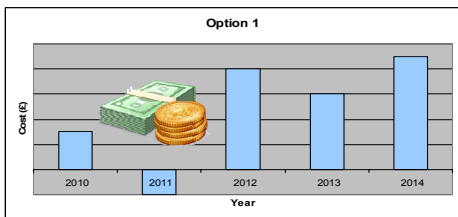
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	9%	3%	9%	10%	3%	14%	4%	6%	11%	9%	4%	7%	10%	13%	10%	5%	10%	6%	11%	8%
Ensure a reliable and continuous water supply	41%	45%	41%	38%	30%	42%	44%	39%	42%	41%	49%	33%	40%	54%	45%	50%	29%	35%	40%	41%
Ensure the safety of tap water – drinking water quality	66%	66%	63%	69%	65%	67%	66%	81%	63%	58%	76%	64%	65%	80%	76%	60%	55%	60%	68%	66%
Manage the appearance, taste and smell of tap water	47%	52%	48%	44%	48%	46%	47%	53%	43%	46%	43%	39%	50%	66%	52%	40%	47%	33%	32%	50%
Manage the pressure of water in your taps and the number of unplanned interruptions	7%	3%	6%	9%	10%	8%	3%	4%	7%	9%	8%	5%	8%	11%	12%	10%	2%	3%	9%	6%
Handle customers' accounts, queries, complaints and customers with special needs	11%	17%	12%	10%	13%	10%	12%	9%	13%	13%	6%	13%	14%	14%	10%	20%	12%	8%	6%	13%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	6%	10%	6%	4%	8%	6%	3%	1%	9%	5%	8%	2%	7%	7%	10%	15%	4%	1%	4%	6%
Manage the amount of water taken from the environment to supply customers	4%	3%	5%	4%	5%	2%	7%	4%	3%	6%	4%	7%	4%	7%	7%	20%	0%	0%	4%	4%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	3%	4%	4%	0%	6%	2%	3%	4%	4%	4%	5%	3%	2%	2%	5%	2%	6%	4%	3%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3%	0%	2%	5%	0%	5%	2%	1%	6%	1%	0%	2%	5%	5%	5%	0%	0%	3%	0%	4%
Avoid risk of homes being flooded with sewage	4%	0%	4%	5%	5%	5%	2%	6%	5%	1%	4%	2%	5%	5%	10%	5%	0%	2%	2%	4%
Avoid risk of properties being flooded with sewage outside the home	4%	7%	3%	5%	0%	6%	4%	6%	2%	6%	0%	5%	6%	0%	7%	15%	4%	3%	4%	4%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	3%	3%	0%	0%	2%	2%	0%	2%	3%	2%	2%	2%	4%	2%	5%	0%	0%	0%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3%	0%	4%	3%	0%	4%	2%	4%	2%	3%	0%	2%	4%	4%	5%	5%	4%	0%	0%	3%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	5%	10%	3%	6%	5%	4%	7%	9%	3%	5%	0%	7%	7%	2%	10%	5%	2%	7%	0%	6%
Bills show one big change in first year, then stay the same for the following four years	10%	10%	11%	10%	13%	8%	12%	10%	13%	8%	6%	8%	12%	11%	5%	5%	10%	14%	4%	12%
Bills change steadily every year, so that customers do not see big changes from year to year	85%	79%	86%	84%	83%	88%	81%	81%	84%	88%	94%	85%	81%	88%	86%	90%	88%	79%	96%	82%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	253	29	109	112	40	124	89	70	103	80	51	61	133	56	42	20	49	86	47	206



3.6 Other Company Information

GENDER

	Total
Male	43%
Female	57%
No of respondents	253

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	64%
Jointly responsible for household finances along with spouse/partner	33%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	1%
Payment through Council rent/social housing	0%
Other	0%
Refused	0%
No of respondents	253

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	28%
Employed Part-time (9-29 hours)	9%
Retired	26%
Not working and not looking for work	28%
Student	2%
Not working and looking for work	7%
Other	0%
Refused	*%
No of respondents	253

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	3%
B	15%
C	12%
D	16%
E	6%
F	0%
G	0%
H	0%
Don't know	49%
No of respondents	253

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	1%
Don't increase / should reduce charges	1%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	0%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	2%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	*%
Other	1%
None	72%
Don't know	26%
Refused	0%
No of respondents	253

**Please note: multiple responses were allowed in this question
Folkestone and Dover Water

1. Key Findings

Northumbrian Water is a water and sewerage company billing 1,056,200 properties for water and 1,093,420 properties for sewerage services.

Uninformed Views of Current and Future Services

89% of customers stated that they were **satisfied** with the services provided by Northumbrian Water, whereas 6% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (42%), the service was good value for money (16%), the water was good quality/clean (15%) and there were no problems with the water (15%). The main reasons that customers were dissatisfied was that prices are always increasing (37%) and that the water services were poor/unreliable (32%).

66% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (42%), the service was worth the money (30%) and they valued the service (27%). 16% of customers stated that the current water and sewerage service was poor value for money, the main reasons being that it was too expensive already (41%), it was not worth the money (21%) and they cannot afford it (17%).

Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 79% felt that the overall company plan was **acceptable**, 17% felt that it was **unacceptable**, and 4% did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

70% of customers stated that the current water service was **good value for money**, 68% stated the current sewerage service was good value for money, and 66% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (40%), the service was worth the money (32%) and they valued the service (26%).

8% of customers stated that the current water service was **poor value for money**, 10% stated the current sewerage service was poor value for money, and 9% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (29%), it was not worth the money (25%) and they don't value the service (18%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.77 for **water** services, 3.77 for **sewerage** services, and 3.71 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

78% of customers felt that Northumbrian Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (45%), the improvements are worth the money (37%) and they valued the improvements (17%).

19% of customers felt that Northumbrian Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (35%), the improvements are not worth the money (26%) and that they cannot afford it (16%).

77% of customers felt that Northumbrian Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (43%) and the improvements are worth the money (37%).

21% of customers felt that Northumbrian Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (39%) and that the improvements are not worth the money (23%).

78% of customers felt that Northumbrian Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (47%) and the improvements are worth the money (34%).

19% of customers felt that Northumbrian Water's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (32%) and that the improvements are not worth the money (29%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.58 for **water** services, 3.65 for **sewerage** services, and 3.60 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 56% (water service), 61% (sewerage) and 59% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 11% (water service), 11% (sewerage service) and 12% (service overall).

Timing

75% of Northumbrian Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.



2. Introduction

The attitudes and preferences of Northumbrian Water's customers, reported in section 3, are based on a sample of 301. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis.

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	85%	88%	85%	83%	84%	86%	84%	82%	85%	86%	73%	78%	86%	84%	85%	92%	84%	84%	72%	87%
Transport	82%	85%	81%	84%	67%	79%	89%	83%	84%	80%	68%	79%	84%	82%	90%	81%	74%	83%	83%	82%
Health Services	86%	87%	85%	88%	87%	81%	90%	90%	84%	86%	90%	83%	87%	82%	90%	92%	90%	85%	91%	85%
Crime Prevention	90%	96%	90%	90%	90%	91%	90%	93%	87%	92%	86%	92%	91%	84%	98%	92%	97%	89%	98%	89%
Environment	86%	88%	83%	92%	79%	88%	87%	89%	85%	86%	76%	71%	89%	87%	88%	92%	92%	83%	91%	85%
Cost of Living	88%	87%	88%	92%	82%	90%	89%	90%	86%	89%	82%	79%	90%	81%	93%	100%	87%	88%	91%	88%
Immigration	66%	76%	63%	68%	55%	65%	70%	59%	73%	64%	68%	57%	67%	70%	70%	69%	66%	63%	54%	68%
Water and Sewerage Services	91%	96%	86%	94%	87%	90%	93%	93%	91%	89%	95%	79%	91%	87%	95%	92%	95%	89%	93%	90%
Utility Services	85%	88%	81%	91%	79%	89%	84%	87%	83%	86%	82%	75%	86%	87%	78%	88%	82%	87%	82%	86%
TOTAL	84%	88%	82%	87%	79%	84%	86%	85%	84%	84%	80%	77%	86%	83%	87%	89%	85%	83%	84%	85%
No of respondents	299	52	143	96	38	114	147	71	107	121	22	23	236	55	40	25	38	141	46	253

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	38%	40%	41%	34%	36%	42%	35%	41%	35%	39%	23%	33%	39%	25%	48%	38%	38%	40%	26%	40%
Improving air quality	35%	31%	36%	35%	44%	26%	40%	37%	39%	31%	50%	25%	35%	29%	25%	35%	31%	42%	46%	33%
Reducing climate change	41%	38%	37%	48%	26%	43%	43%	39%	43%	40%	36%	46%	41%	55%	35%	46%	44%	35%	30%	43%
More activity on nature conservation etc	14%	17%	14%	10%	18%	10%	16%	13%	14%	15%	9%	13%	15%	20%	18%	12%	13%	11%	9%	15%
Reducing litter and household waste	22%	23%	21%	22%	26%	25%	19%	23%	21%	23%	27%	29%	20%	15%	25%	19%	28%	23%	26%	22%
Improvements to tackling flooding	17%	13%	14%	21%	13%	20%	15%	18%	17%	16%	27%	13%	16%	22%	18%	19%	8%	16%	22%	16%
Encouraging people to use less water	10%	12%	9%	10%	10%	10%	9%	7%	11%	10%	9%	13%	10%	9%	10%	8%	5%	11%	13%	9%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	63%	65%	63%	66%	46%	68%	64%	62%	63%	64%	64%	75%	62%	56%	78%	69%	67%	60%	63%	63%
Removal and treatment of waste water	45%	35%	48%	44%	36%	42%	50%	48%	47%	41%	55%	58%	45%	42%	50%	23%	36%	51%	59%	42%
Dealing with sewer flooding	41%	38%	40%	45%	23%	43%	44%	49%	40%	37%	55%	33%	41%	38%	45%	46%	38%	40%	41%	41%
Maintaining pipes, treatment works, and other infrastructure	45%	48%	47%	42%	23%	52%	44%	38%	50%	43%	32%	50%	46%	44%	43%	50%	44%	45%	37%	46%
Protecting the water environment	42%	35%	40%	50%	31%	39%	47%	51%	44%	34%	59%	17%	45%	55%	45%	35%	41%	38%	41%	42%
Managing water pollution from agriculture and manufacturing	31%	25%	35%	27%	21%	30%	34%	32%	28%	32%	23%	21%	32%	38%	33%	23%	31%	28%	30%	31%
Drainage of roads	34%	29%	37%	33%	33%	31%	35%	39%	31%	32%	41%	17%	35%	35%	35%	31%	33%	33%	30%	34%
Reducing litter in waterways	35%	29%	35%	39%	23%	37%	36%	39%	27%	39%	41%	25%	37%	29%	33%	27%	38%	38%	24%	36%
Preventing flooding from rivers	29%	27%	29%	31%	18%	33%	28%	42%	23%	25%	27%	21%	31%	24%	33%	19%	36%	29%	33%	28%
Managing canal systems	28%	27%	30%	27%	28%	26%	30%	32%	28%	26%	32%	21%	30%	29%	33%	23%	26%	28%	35%	27%
Helping to reduce greenhouse gas emissions and tackle climate change	25%	33%	24%	25%	10%	28%	27%	27%	23%	26%	23%	13%	28%	29%	28%	19%	28%	23%	26%	25%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

Q12. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR APPROACH TO PAYING YOUR BILL/S?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't find it difficult to pay on time	80%	79%	81%	79%	86%	85%	74%	79%	79%	81%	82%	83%	81%	65%	85%	68%	89%	84%	93%	77%
I usually pay on time, but it can be difficult	14%	14%	13%	13%	8%	12%	17%	13%	15%	13%	9%	13%	14%	29%	15%	18%	5%	9%	0%	16%
I sometimes pay late depending on what other bills I have to pay	4%	5%	2%	6%	3%	2%	6%	6%	4%	2%	9%	4%	2%	4%	0%	9%	5%	3%	4%	4%
I often find it a challenge and have to delay payments as long as possible	2%	0%	3%	1%	3%	2%	2%	2%	1%	3%	0%	0%	1%	2%	0%	5%	0%	2%	0%	2%
I don't usually pay my bills on time	1%	2%	0%	1%	0%	0%	2%	0%	1%	1%	0%	0%	1%	0%	0%	0%	0%	2%	2%	0%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	265	43	128	86	37	104	124	62	96	107	22	23	203	48	33	22	38	124	45	220

Please note this question was only asked to sole/joint responsibility bill payers.

Q13. HAVE YOU/HOUSEHOLD MEMBER CONTACTED YOUR WATER AND SEWERAGE COMPANY OTHER THAN TO PAY THE BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	6%	6%	7%	5%	5%	9%	4%	3%	5%	9%	5%	13%	6%	4%	13%	4%	5%	1%	2%	7%
No	94%	94%	92%	95%	92%	91%	96%	97%	95%	90%	95%	83%	94%	96%	88%	96%	95%	18%	96%	93%
Don't know/can't say	*%	0%	1%	0%	3%	0%	0%	0%	0%	1%	0%	4%	0%	0%	0%	0%	0%	0%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	18%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

Q14. WHAT WAS THE REASON FOR THE CONTACT?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
To make a complaint	11%	0%	8%	17%	0%	17%	0%	0%	17%	8%	0%	0%	11%	0%	33%	0%	0%	0%	0%	10%
General enquiry	67%	67%	62%	33%	100%	42%	63%	67%	50%	54%	0%	67%	56%	50%	33%	100%	100%	55%	100%	52%
Request information	22%	33%	15%	17%	0%	17%	25%	33%	17%	15%	0%	0%	22%	0%	17%	0%	0%	27%	0%	19%
To report a problem	22%	0%	15%	33%	0%	25%	13%	0%	17%	23%	100%	33%	11%	50%	17%	0%	0%	18%	0%	19%
To obtain a water meter	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Payment issue - not specified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a change of address	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To make an enquiry on the billing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Can't remember	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	122%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	18	3	13	6	2	12	8	3	6	13	1	3	18	2	6	1	2	11	1	21

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	4%	4%	3%	4%	8%	3%	3%	3%	5%	3%	5%	0%	4%	2%	5%	0%	3%	5%	2%	4%
Unacceptable	13%	4%	14%	17%	8%	11%	16%	14%	11%	15%	18%	21%	12%	15%	20%	8%	10%	13%	11%	14%
Acceptable	68%	71%	69%	67%	69%	68%	68%	68%	72%	65%	64%	67%	68%	80%	58%	81%	62%	66%	74%	67%
Very acceptable	11%	15%	12%	8%	8%	15%	10%	10%	10%	13%	9%	8%	13%	4%	18%	12%	21%	10%	2%	13%
Don't know/can't say	4%	6%	1%	4%	8%	3%	3%	6%	2%	4%	5%	4%	3%	0%	0%	0%	5%	6%	11%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255



3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - No risk of hosepipe ban
	Ensure the safety of tap water - drinking water quality	99.94% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 1,927 customer complaints to water company about the taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	181 properties at risk of low water pressure at the tap. Supplies to 653 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.3% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls and no calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £124
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	454 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	266 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	60km of river of poor/bad quality, 830km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £157
	CURRENT AVERAGE TOTAL BILL = £281	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	1%	2%	1%	1%	0%	1%	1%	0%	2%	1%	0%	0%	1%	0%	0%	0%	3%	1%	4%	0%
Fairly poor value for money	7%	0%	10%	8%	8%	8%	7%	8%	4%	10%	0%	13%	8%	7%	3%	4%	8%	9%	7%	7%
Neither poor nor good value for money	20%	19%	19%	22%	13%	25%	18%	21%	19%	20%	5%	33%	18%	22%	20%	23%	18%	19%	13%	21%
Fairly good value for money	55%	62%	55%	52%	56%	50%	60%	54%	61%	52%	73%	42%	56%	62%	60%	58%	44%	55%	52%	56%
Very good value for money	15%	15%	14%	17%	18%	16%	14%	14%	14%	16%	18%	13%	16%	9%	18%	12%	28%	13%	22%	14%
Don't know/can't say	1%	2%	1%	0%	5%	1%	1%	3%	1%	1%	5%	0%	1%	0%	0%	4%	0%	2%	2%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.77	3.90	3.74	3.75	3.89	3.72	3.78	3.75	3.82	3.74	4.14	3.54	3.78	3.73	3.93	3.80	3.87	3.71	3.82	3.76
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255



3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£1
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - No risk of hosepipe ban	Maintain current service	£4
	99.94% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£2
	Approximately 1,927 customer complaints to water company about the taste or smell of tap water each year	Reduce complaints about tap water	<50p
	181 properties at risk of low water pressure at the tap. Supplies to 653 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain current service, improving service where possible by working more effectively	£0
	99.3% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls and no calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	General programme including investigations to better protect assets from severe weather, safeguarding service for all customers	<50p
	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Maintain current service	£0
WATER BILL - FROM £124 IN 2010 TO £133 IN 2014/5			£9
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	-£14
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£4
	454 properties at risk of internal flooding from sewers at least once in ten years	Maintain current service	£5
	266 areas at risk of external flooding from sewers at least once in ten years	Maintain current service	£0
	Sewerage system could occasionally be disrupted e.g. by extreme events	General programme including investigations to better protect from severe weather, safeguarding service for all customers	<50p
	60km of river of poor/bad quality, 830km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters do not meet minimum standards	An additional: 40km of river can better support fish; and 10km of river can better support other wildlife: plus 0 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£5
	SEWERAGE BILL - FROM £159 IN 2010 TO £157 IN 2014/5		
TOTAL COMBINED BILL - FROM £282 IN 2010 TO £290 BY 2014/5			£8

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	18%	12%	18%	24%	13%	14%	23%	17%	20%	18%	13%	18%	20%	24%	23%	28%	13%	14%	24%	17%
Improvements are worth the money	37%	39%	39%	31%	37%	34%	39%	45%	40%	29%	50%	41%	34%	40%	38%	28%	38%	37%	29%	38%
Plan is affordable	43%	49%	43%	40%	50%	52%	35%	34%	40%	52%	38%	41%	45%	33%	38%	44%	50%	47%	41%	44%
Have no choice but to pay	*%	0%	0%	1%	0%	0%	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	3%	0%
Other	*%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	1%	3%	0%
Don't know/can't say	*%	0%	0%	1%	0%	0%	1%	2%	0%	0%	0%	0%	1%	2%	0%	0%	0%	0%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	230	41	114	70	30	91	109	53	82	95	16	17	185	42	26	25	32	105	34	196

Q25. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN AS A WHOLE AND THE IMPACT ON YOUR OVERALL BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	5%	6%	4%	6%	5%	6%	4%	4%	8%	2%	9%	4%	5%	4%	8%	0%	5%	6%	0%	6%
Unacceptable	14%	2%	17%	15%	13%	13%	14%	14%	10%	16%	9%	29%	13%	13%	10%	4%	10%	18%	17%	13%
Acceptable	65%	75%	63%	66%	62%	65%	66%	62%	68%	65%	77%	54%	64%	73%	65%	81%	62%	60%	74%	64%
Very acceptable	13%	17%	13%	10%	15%	13%	12%	17%	9%	13%	0%	8%	14%	7%	13%	15%	21%	12%	4%	14%
Don't know/can't say	4%	0%	3%	3%	5%	3%	4%	3%	5%	3%	5%	4%	4%	4%	5%	0%	3%	4%	4%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

Q26. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	5%	25%	7%	0%	29%	0%	4%	0%	5%	9%	0%	13%	5%	0%	0%	0%	17%	6%	13%	4%
Improvements not worth the money	29%	25%	30%	25%	29%	32%	26%	23%	30%	30%	25%	63%	24%	22%	71%	0%	33%	21%	25%	29%
Too expensive already	32%	0%	23%	50%	14%	18%	48%	31%	35%	30%	25%	0%	38%	22%	14%	0%	33%	39%	13%	35%
Cannot afford it	16%	25%	10%	25%	0%	18%	19%	31%	15%	9%	50%	0%	14%	33%	14%	0%	0%	15%	13%	17%
Oppose paying more for a natural resource	9%	0%	17%	0%	14%	14%	4%	8%	5%	13%	0%	13%	10%	11%	0%	100%	0%	9%	0%	10%
Oppose paying more to companies who make large profits	7%	0%	13%	0%	14%	14%	0%	8%	5%	9%	0%	13%	7%	11%	0%	0%	0%	9%	25%	4%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	2%	25%	0%	0%	0%	5%	0%	0%	5%	0%	0%	0%	2%	0%	0%	0%	17%	0%	13%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	56	4	30	20	7	22	27	13	20	23	4	8	42	9	7	1	6	33	8	48

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	18%	17%	18%	18%	13%	17%	19%	16%	22%	15%	12%	0%	20%	20%	19%	20%	19%	15%	22%	17%
Improvements are worth the money	34%	27%	36%	37%	30%	29%	39%	39%	31%	34%	53%	47%	32%	39%	32%	32%	38%	32%	39%	33%
Plan is affordable	47%	54%	45%	42%	57%	53%	39%	43%	47%	49%	35%	53%	47%	41%	48%	48%	44%	50%	33%	49%
Other	1%	0%	0%	3%	0%	0%	2%	2%	0%	1%	0%	0%	1%	0%	0%	0%	0%	2%	6%	0%
Don't know/can't say	*%	2%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	234	48	110	73	30	90	114	56	83	95	17	15	186	44	31	25	32	102	36	198

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	3%	5%	13%	48%	29%	3%	301
Ensure a reliable and continuous water supply	1%	4%	17%	46%	30%	2%	301
Ensure the safety of tap water – drinking water quality	2%	4%	22%	39%	33%	1%	301
Manage the appearance, taste and smell of tap water	2%	6%	21%	38%	33%	1%	301
Manage the pressure of water in your taps and the number of unplanned interruptions	3%	4%	22%	47%	23%	2%	301
Handle customers' accounts, queries, complaints and customers with special needs	1%	4%	28%	45%	20%	2%	301
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	1%	8%	31%	43%	14%	3%	301
Manage the amount of water taken from the environment to supply customers	1%	4%	24%	45%	25%	3%	301
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3%	7%	31%	40%	18%	2%	301
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	1%	4%	24%	46%	25%	1%	301
Avoid risk of homes being flooded with sewage	1%	4%	26%	48%	20%	*%	301
Avoid risk of properties being flooded with sewage outside the home	2%	4%	25%	46%	23%	1%	301
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	7%	31%	43%	16%	3%	301
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	6%	24%	45%	23%	2%	301
TOTAL	2%	5%	24%	44%	24%	2%	301

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.98	4.02	3.97	3.97	4.05	3.95	3.99	4.10	3.86	4.03	4.00	3.70	4.03	3.93	3.95	4.21	4.05	3.96	4.13	3.96
Ensure a reliable and continuous water supply	4.00	3.98	4.06	3.93	4.05	3.98	4.00	4.00	3.98	4.02	3.86	3.95	4.03	3.98	4.03	4.12	4.00	3.98	4.22	3.96
Ensure the safety of tap water – drinking water quality	3.97	3.96	4.01	3.93	4.10	3.95	3.94	3.93	3.99	3.97	3.82	3.88	4.02	3.89	4.13	4.23	4.08	3.87	4.18	3.93
Manage the appearance, taste and smell of tap water	3.94	3.92	4.01	3.87	3.95	3.93	3.94	3.81	3.96	3.99	3.77	4.04	3.98	3.95	4.08	3.88	3.95	3.91	4.15	3.90
Manage the pressure of water in your taps and the number of unplanned interruptions	3.84	3.90	3.81	3.86	3.82	3.78	3.90	3.91	3.84	3.81	3.95	3.79	3.86	3.91	3.90	3.96	3.77	3.80	3.98	3.82
Handle customers' accounts, queries, complaints and customers with special needs	3.82	3.98	3.72	3.86	3.68	3.82	3.85	3.93	3.75	3.81	3.95	3.52	3.86	3.75	3.90	3.85	3.84	3.81	3.80	3.82
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.64	3.65	3.59	3.71	3.62	3.66	3.62	3.56	3.68	3.65	3.45	3.65	3.65	3.59	3.69	3.78	3.64	3.61	3.76	3.61
Manage the amount of water taken from the environment to supply customers	3.92	4.02	3.83	4.00	4.03	3.96	3.86	3.78	3.95	3.97	4.00	3.71	3.93	3.85	3.85	4.08	3.92	3.93	4.00	3.90
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.66	3.75	3.56	3.80	3.47	3.68	3.68	3.67	3.64	3.66	3.45	3.46	3.69	3.62	3.73	3.84	3.64	3.62	3.82	3.63
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.90	3.98	3.84	3.94	4.03	3.88	3.88	3.87	3.94	3.88	3.82	3.83	3.91	3.91	3.88	4.00	3.85	3.89	4.07	3.86
Avoid risk of homes being flooded with sewage	3.82	3.94	3.74	3.89	3.89	3.82	3.81	3.89	3.87	3.75	3.59	3.83	3.86	3.89	3.88	3.81	3.76	3.80	3.96	3.80
Avoid risk of properties being flooded with sewage outside the home	3.84	3.84	3.77	3.95	3.81	3.79	3.89	3.96	3.90	3.73	4.09	3.87	3.84	3.91	3.70	3.73	3.79	3.89	3.96	3.82
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.68	3.78	3.64	3.72	3.65	3.75	3.63	3.67	3.69	3.68	3.68	3.73	3.68	3.67	3.63	3.96	3.68	3.65	3.73	3.67
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.86	4.02	3.84	3.82	4.11	3.90	3.76	3.83	3.82	3.91	3.73	3.83	3.88	3.87	3.85	4.00	3.85	3.83	3.93	3.84
TOTAL	3.85	3.91	3.81	3.87	3.88	3.85	3.84	3.85	3.85	3.84	3.80	3.77	3.87	3.84	3.87	3.96	3.84	3.82	3.98	3.82
No of respondents	301	52	139	94	38	112	143	70	105	118	22	23	230	55	39	24	39	136	45	248

Q28b. VALUE FOR MONEY OF WATER SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	3%	2%	3%	2%	3%	4%	1%	0%	3%	4%	0%	4%	3%	0%	5%	0%	8%	2%	2%	3%
Fairly poor value for money	8%	2%	8%	10%	5%	3%	12%	8%	8%	7%	5%	21%	7%	11%	13%	4%	3%	8%	9%	8%
Neither poor nor good value for money	34%	46%	30%	33%	26%	35%	35%	31%	40%	30%	36%	17%	33%	36%	40%	31%	33%	31%	15%	37%
Fairly good value for money	40%	35%	43%	36%	49%	41%	36%	46%	32%	42%	55%	46%	38%	42%	25%	50%	41%	40%	54%	37%
Very good value for money	16%	15%	14%	18%	15%	17%	16%	14%	17%	16%	5%	8%	19%	11%	18%	15%	15%	18%	20%	15%
Don't know/can't say	*%	0%	1%	0%	3%	0%	0%	0%	0%	1%	0%	4%	0%	0%	0%	0%	0%	1%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	3%	2%	3%	3%	5%	3%	2%	0%	4%	4%	0%	4%	3%	2%	0%	4%	8%	3%	2%	3%
Fairly poor value for money	8%	4%	9%	7%	10%	6%	8%	10%	7%	7%	9%	25%	6%	4%	15%	4%	0%	10%	7%	8%
Neither poor nor good value for money	29%	27%	27%	34%	21%	34%	27%	27%	36%	24%	41%	25%	26%	40%	18%	27%	31%	28%	11%	32%
Fairly good value for money	43%	46%	45%	35%	49%	36%	46%	46%	35%	47%	45%	33%	44%	40%	45%	42%	49%	41%	57%	40%
Very good value for money	18%	21%	16%	20%	15%	21%	16%	17%	18%	19%	5%	13%	20%	15%	23%	23%	13%	18%	24%	17%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

Q28b. VALUE FOR MONEY OF COMBINED SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	3%	2%	4%	3%	3%	5%	2%	1%	3%	5%	0%	13%	3%	0%	3%	0%	8%	4%	2%	4%
Fairly poor value for money	9%	8%	10%	7%	8%	7%	10%	8%	8%	9%	9%	13%	8%	9%	18%	4%	8%	7%	9%	9%
Neither poor nor good value for money	29%	19%	26%	39%	18%	32%	29%	30%	31%	25%	36%	25%	27%	36%	15%	38%	15%	31%	15%	31%
Fairly good value for money	43%	48%	46%	36%	54%	37%	45%	45%	39%	46%	41%	42%	44%	45%	45%	38%	51%	40%	50%	42%
Very good value for money	16%	23%	14%	15%	15%	18%	14%	14%	18%	15%	14%	8%	17%	9%	20%	19%	18%	16%	24%	14%
Don't know/can't say	1%	0%	1%	0%	3%	0%	1%	1%	1%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		Age	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Total water bill by 2014-15	3.58	3.60	3.57	3.57	3.71	3.62	3.52	3.66	3.52	3.60	3.59	3.35	3.63	3.53	3.38	3.77	3.54	3.64	3.80	3.54
Total sewerage bill by 2014-15	3.65	3.81	3.61	3.61	3.59	3.64	3.67	3.70	3.56	3.70	3.45	3.25	3.72	3.62	3.75	3.77	3.59	3.62	3.93	3.60
Total combined bill by 2014-15	3.60	3.83	3.56	3.52	3.74	3.57	3.58	3.63	3.61	3.57	3.59	3.21	3.65	3.55	3.63	3.73	3.64	3.57	3.85	3.55
No of respondents	301	52	139	94	38	112	143	70	105	118	22	23	230	55	39	24	39	136	45	248

Q29. ARE THERE ANY OTHER CHANGES TO THE COMPANY PLAN THAT YOU WOULD LIKE TO SEE MADE THAT HAVE NOT BEEN COVERED?

	Total
Reduce prices / charges	2%
Improve water appearance / colour / quality / taste	2%
Quicker response times	0%
Reduce number of leakages / increase repairs to pipes	*%
Improve the sewage system	0%
Generally take more responsibility	0%
Install water meters nationally	0%
Consumers shouldn't have to pay for beach / coastline cleaning	*%
Improve the water pressure	0%
Deal with the drainage problems/ flooding problems	1%
Give the option to install a water meter	0%
Be responsible for repairs to all pipes	0%
Have a fairer pricing / water charging scheme	0%
Increase in charges should be linked to improvements	*%
Service should be nationalized	*%
Improve water saving methods	0%
Water is too chalky / hard water / lime scale problems	0%
Improve level of service / customer service / customer information	*%
Protect nature / wildlife / environment	0%
Reduce money wastage (unspecified source)	0%
More frequent meter readings	0%
Plan should already be in action / already doing things like this	0%
Other	*%
None	93%
Don't know	*%
Refused	*%
No of respondents	301

**Please note: multiple responses were allowed in this question. Percentages show number of respondents giving an answer.

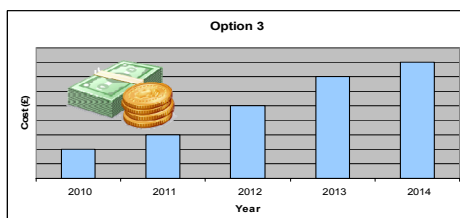
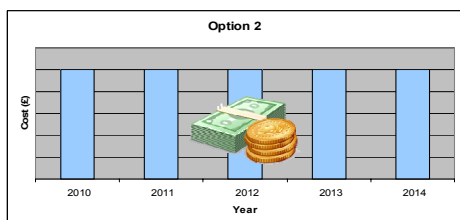
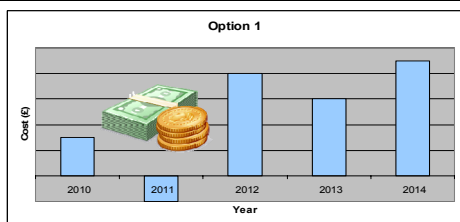
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	20%	27%	21%	18%	18%	20%	21%	17%	18%	25%	9%	13%	22%	20%	15%	27%	23%	20%	9%	22%
Ensure a reliable and continuous water supply	32%	37%	32%	32%	36%	28%	35%	28%	37%	30%	23%	33%	33%	38%	35%	35%	31%	29%	30%	33%
Ensure the safety of tap water – drinking water quality	51%	46%	54%	52%	36%	50%	56%	52%	47%	54%	50%	58%	50%	53%	58%	50%	51%	49%	52%	51%
Manage the appearance, taste and smell of tap water	32%	27%	31%	31%	33%	24%	37%	31%	34%	30%	23%	42%	32%	35%	48%	12%	26%	31%	39%	30%
Manage the pressure of water in your taps and the number of unplanned interruptions	9%	13%	8%	9%	13%	6%	11%	8%	11%	8%	18%	8%	8%	11%	10%	0%	21%	7%	15%	8%
Handle customers' accounts, queries, complaints and customers with special needs	10%	17%	9%	7%	8%	10%	12%	6%	13%	11%	14%	8%	10%	13%	3%	8%	3%	14%	9%	11%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	12%	12%	10%	14%	15%	14%	9%	8%	16%	10%	23%	8%	10%	15%	8%	15%	10%	11%	15%	11%
Manage the amount of water taken from the environment to supply customers	4%	2%	5%	2%	5%	4%	3%	7%	2%	3%	5%	4%	3%	4%	0%	8%	0%	5%	0%	4%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	0%	7%	2%	3%	5%	3%	1%	4%	6%	0%	0%	5%	4%	3%	0%	5%	5%	4%	4%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	0%	3%	2%	3%	2%	2%	1%	4%	1%	0%	0%	3%	2%	0%	8%	0%	2%	4%	2%
Avoid risk of homes being flooded with sewage	9%	6%	7%	14%	5%	8%	10%	14%	8%	6%	23%	4%	8%	16%	8%	19%	0%	6%	9%	9%
Avoid risk of properties being flooded with sewage outside the home	3%	2%	2%	6%	0%	2%	5%	3%	5%	2%	5%	4%	3%	5%	3%	8%	0%	3%	2%	4%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3%	4%	2%	3%	0%	3%	3%	0%	6%	2%	0%	0%	3%	2%	5%	0%	3%	3%	4%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	0%	1%	2%	3%	2%	1%	3%	2%	0%	9%	0%	1%	2%	0%	0%	3%	1%	2%	1%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	7%	6%	10%	3%	10%	10%	3%	3%	6%	10%	9%	13%	6%	4%	8%	0%	15%	6%	0%	8%
Bills show one big change in first year, then stay the same for the following four years	18%	17%	15%	21%	28%	19%	14%	17%	19%	17%	36%	8%	16%	22%	5%	27%	18%	18%	13%	19%
Bills change steadily every year, so that customers do not see big changes from year to year	75%	77%	75%	76%	62%	71%	82%	80%	75%	73%	55%	79%	77%	75%	88%	73%	67%	75%	87%	73%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	301	52	145	96	39	115	147	71	108	122	22	24	237	55	40	26	39	141	46	255



3.6 Other Company Information

GENDER

	Total
Male	49%
Female	51%
No of respondents	301

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	63%
Jointly responsible for household finances along with spouse/partner	25%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	1%
Payment through Council rent/social housing	9%
Other	0%
Refused	0%
No of respondents	301

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	42%
Employed Part-time (9-29 hours)	7%
Retired	33%
Not working and not looking for work	8%
Student	2%
Not working and looking for work	8%
Other	0%
Refused	*%
No of respondents	301

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	23%
B	8%
C	4%
D	5%
E	1%
F	0%
G	0%
H	0%
Don't know	59%
No of respondents	301

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	0%
Don't increase / should reduce charges	1%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	*%
Improve the waters appearance / colour / quality / taste	0%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	1%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	1%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	*%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	*%
None	97%
Don't know	0%
Refused	0%
No of respondents	301

**Please note: multiple responses were allowed in this question
Northumbrian Water

1. Key Findings

Portsmouth Water is a water company billing 274,300 properties for water services. Sewerage services for Portsmouth Water are provided by Southern Water.

Uninformed Views of Current and Future Services

73% of customers stated that they were **satisfied** with the services provided by Portsmouth Water, whereas 10% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (66%) and that there were no problems with the service (16%). The main reasons that customers were dissatisfied were that it was too expensive already (62%) and that the prices are always increasing (12%).

64% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that they valued the service (71%) and the service was worth the money (21%). 12% of customers stated that the current water and sewerage service was poor value for money, the main reasons being that it was too expensive already (67%) and that it was not worth the money (22%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Portsmouth Water and Southern Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 38% felt that the overall company plan was **acceptable**, 52% felt that it was **unacceptable**, and 9% stated that they did not know.

Informed Views on Current service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

45% of customers stated that the current water service was **good value for money**, 37% stated the current sewerage service (provided by Southern Water) was good value for money, and 36% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that they valued the service (67%), the service was worth the money (14%) and that the bill was affordable (11%).

26% of customers stated that the current water service was **poor value for money**, 30% stated the current sewerage service was poor value for money, and 26% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (84%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.22 for **water** services, 3.06 for **sewerage** services, and 3.10 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Portsmouth Water's water and Southern Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

39% of customers felt that Portsmouth Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that they valued the improvements (52%), the improvements are worth the money (21%) and the plan is affordable (17%).

46% of customers felt that Portsmouth Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reason being that it was too expensive already (77%).

34% of customers felt that Southern Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that they valued the improvements (53%), the improvements are worth the money (21%) and the plan is affordable (13%).

50% of customers felt that Southern Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reason being that it was too expensive already (73%).

35% of customers felt that Portsmouth Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that they valued the improvements (56%) and the improvements are worth the money (27%).

49% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reason being that it was too expensive already (74%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.23 for Portsmouth Water's **water** services, 3.15 for Southern Water's **sewerage** services, and 3.14 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 26% (water service), 30% (sewerage) and 24% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 8% (water service), 14% (sewerage service) and 11% (service overall).

Timing

78% of Portsmouth Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

2. Introduction

The attitudes and preferences of Portsmouth Water customers, reported in section 3, are based on a sample of 254. Results are broken down by: age; socio-economic group (SEG); household size, whether the household has a water meter; gross household income; and location of the property.

If, for a particular segmentation variable, the respondent answered don't know/refused, then responses have been excluded from the analysis. This therefore means that there are very small differences in the number of respondents reported in tables and the number participating in the survey. When calculating mean score values, respondents answering 'don't know' have been excluded from the analysis.

3 Detailed Findings

3.1 Views on Social Issues

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)

(% who consider it fairly important/very important)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Education	75%	84%	75%	72%	75%	74%	79%	76%	66%	84%	72%	100%	75%	70%	76%	75%	78%	77%	83%	75%
Transport	68%	59%	68%	70%	72%	67%	66%	72%	63%	70%	72%	69%	68%	69%	58%	63%	72%	72%	100%	66%
Health Services	81%	89%	78%	83%	74%	81%	90%	87%	75%	85%	72%	92%	82%	84%	90%	67%	69%	84%	100%	81%
Crime Prevention	74%	70%	73%	79%	77%	72%	77%	85%	66%	77%	82%	92%	73%	74%	68%	67%	71%	81%	83%	74%
Environment	80%	81%	80%	81%	70%	81%	87%	83%	76%	82%	71%	85%	81%	82%	76%	67%	74%	86%	75%	80%
Cost of Living	78%	76%	75%	82%	77%	74%	85%	83%	71%	81%	78%	92%	77%	76%	82%	71%	72%	80%	100%	76%
Immigration	53%	39%	53%	57%	51%	52%	56%	56%	49%	55%	61%	46%	51%	45%	47%	70%	54%	55%	92%	51%
Water and Sewerage Services	83%	89%	81%	85%	79%	82%	90%	89%	79%	85%	89%	85%	83%	82%	86%	79%	75%	87%	100%	83%
Utility Services	81%	70%	80%	85%	79%	79%	85%	89%	74%	83%	83%	85%	81%	84%	74%	63%	78%	88%	92%	80%
TOTAL	75%	74%	74%	77%	73%	74%	80%	80%	69%	78%	76%	83%	75%	75%	73%	69%	72%	79%	92%	74%
No of respondents	251	37	114	96	57	133	61	45	100	105	18	13	215	47	50	24	36	94	12	239

Excludes 'don't know' responses

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

(% who consider it important - multiple response question, maximum of 2 responses per respondent)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Protecting the water environment	20%	3%	14%	32%	33%	16%	16%	32%	22%	12%	61%	54%	14%	14%	16%	29%	31%	18%	83%	17%
Improving air quality	36%	46%	33%	35%	33%	37%	37%	32%	43%	32%	22%	23%	39%	42%	30%	38%	25%	40%	8%	38%
Reducing climate change	43%	43%	45%	40%	46%	44%	37%	43%	41%	45%	28%	23%	45%	30%	34%	38%	53%	51%	33%	43%
More activity on nature conservation etc	19%	3%	28%	14%	23%	22%	8%	11%	23%	19%	17%	15%	19%	14%	18%	25%	19%	20%	8%	19%
Reducing litter and household waste	38%	41%	32%	43%	32%	36%	47%	49%	36%	34%	50%	23%	38%	48%	46%	29%	22%	36%	42%	38%
Improvements to tackling flooding	9%	16%	7%	8%	7%	12%	5%	4%	12%	9%	0%	15%	10%	10%	12%	17%	14%	3%	0%	10%
Encouraging people to use less water	6%	5%	9%	4%	2%	8%	6%	2%	8%	7%	0%	8%	6%	12%	4%	4%	8%	4%	8%	6%
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242

Q3. WHICH OF THE FOLLOWING DO YOU BELIEVE YOUR WATER AND SEWERAGE COMPANY ARE RESPONSIBLE FOR?

(% who believed company was responsible for - multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Providing safe, reliable, clean drinking water	71%	65%	70%	75%	70%	71%	73%	74%	71%	70%	83%	77%	71%	84%	82%	63%	69%	62%	67%	71%
Removal and treatment of waste water	70%	68%	67%	74%	65%	70%	73%	70%	70%	70%	67%	77%	71%	80%	80%	67%	61%	63%	67%	70%
Dealing with sewer flooding	60%	43%	62%	64%	58%	61%	60%	60%	65%	56%	61%	54%	61%	52%	78%	67%	58%	54%	75%	60%
Maintaining pipes, treatment works, and other infrastructure	59%	49%	55%	65%	51%	61%	61%	72%	54%	57%	61%	31%	61%	62%	70%	54%	50%	55%	75%	58%
Protecting the water environment	49%	30%	52%	51%	56%	49%	42%	51%	49%	49%	44%	31%	50%	40%	48%	54%	53%	51%	83%	47%
Managing water pollution from agriculture and manufacturing	43%	35%	43%	45%	39%	47%	37%	47%	41%	44%	39%	23%	44%	44%	36%	50%	42%	45%	83%	41%
Drainage of roads	45%	38%	46%	46%	40%	51%	37%	53%	47%	41%	44%	38%	45%	38%	40%	54%	47%	49%	58%	45%
Reducing litter in waterways	40%	38%	35%	46%	30%	46%	37%	47%	42%	36%	50%	54%	39%	34%	42%	42%	36%	44%	50%	40%
Preventing flooding from rivers	36%	27%	32%	43%	28%	42%	31%	43%	39%	31%	39%	38%	36%	34%	36%	33%	33%	39%	50%	36%
Managing canal systems	37%	24%	34%	44%	32%	44%	26%	49%	40%	30%	44%	46%	36%	34%	30%	33%	44%	40%	42%	37%
Helping to reduce greenhouse gas emissions and tackle climate change	39%	30%	39%	43%	30%	46%	34%	43%	38%	39%	39%	46%	39%	40%	42%	38%	42%	37%	42%	39%
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242



Q12. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR APPROACH TO PAYING YOUR BILL/S?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't find it difficult to pay on time	65%	35%	61%	76%	75%	69%	45%	80%	65%	57%	89%	55%	62%	53%	45%	65%	85%	73%	73%	64%
I usually pay on time, but it can be difficult	28%	46%	35%	16%	23%	24%	42%	16%	29%	33%	11%	36%	30%	39%	41%	35%	15%	20%	9%	29%
I sometimes pay late depending on what other bills I have to pay	5%	15%	4%	4%	2%	6%	7%	5%	2%	9%	0%	9%	6%	5%	12%	0%	0%	5%	9%	5%
I often find it a challenge and have to delay payments as long as possible	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't usually pay my bills on time	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	2%	4%	0%	3%	0%	1%	5%	0%	3%	1%	0%	0%	2%	3%	2%	0%	0%	2%	9%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	230	26	109	92	52	123	55	44	92	93	18	11	197	38	49	23	34	86	11	219

Please note this question was only asked to sole/joint responsibility bill payers.

Q13. HAVE YOU/HOUSEHOLD MEMBER CONTACTED YOUR WATER AND SEWERAGE COMPANY OTHER THAN TO PAY THE BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	6%	3%	6%	6%	12%	4%	2%	15%	3%	4%	33%	8%	3%	4%	6%	4%	6%	1%	0%	6%
No	93%	95%	93%	93%	84%	96%	97%	85%	95%	95%	67%	92%	95%	96%	94%	96%	89%	24%	83%	94%
Don't know/can't say	1%	3%	1%	1%	4%	0%	2%	0%	2%	1%	0%	0%	1%	0%	0%	0%	6%	0%	17%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	26%	100%	100%
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242

Q14. WHAT WAS THE REASON FOR THE CONTACT?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
To make a complaint	21%	0%	29%	17%	0%	50%	0%	14%	0%	50%	17%	0%	29%	100%	0%	0%	50%	0%	0%	21%
General enquiry	36%	100%	0%	67%	29%	50%	0%	57%	33%	0%	50%	100%	14%	0%	67%	0%	0%	50%	0%	36%
Request information	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a problem	36%	0%	71%	0%	57%	0%	100%	14%	67%	50%	17%	0%	57%	0%	0%	100%	50%	50%	0%	36%
To obtain a water meter	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Payment issue - not specified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To report a change of address	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
To make an enquiry on the billing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	7%	0%	0%	17%	14%	0%	0%	14%	0%	0%	17%	0%	0%	0%	33%	0%	0%	0%	0%	7%
Can't remember	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%
No of respondents / responses	14	1	7	6	7	6	1	7	3	4	6	1	7	2	3	1	2	6	0	14

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	11%	8%	14%	9%	7%	13%	11%	13%	7%	14%	11%	15%	11%	12%	8%	13%	6%	14%	8%	11%
Unacceptable	41%	46%	46%	35%	33%	47%	37%	32%	44%	44%	33%	8%	44%	46%	46%	50%	28%	39%	8%	43%
Acceptable	38%	32%	32%	45%	56%	30%	39%	47%	42%	30%	50%	77%	35%	30%	36%	38%	64%	34%	83%	36%
Very acceptable	*%	0%	0%	1%	0%	1%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Don't know/can't say	9%	14%	8%	9%	4%	10%	13%	6%	8%	11%	6%	0%	10%	12%	10%	0%	3%	12%	0%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 50 years
	Ensure the safety of tap water - drinking water quality	99.97% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 214 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	66 properties at risk of low water pressure at the tap. Supplies to no properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.3% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 1 sites suffer from low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £86
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	251 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	2,841 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £222
	CURRENT AVERAGE TOTAL BILL = £308	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	5%	5%	5%	4%	5%	5%	3%	2%	7%	4%	0%	0%	6%	6%	8%	4%	6%	2%	0%	5%
Fairly poor value for money	21%	22%	30%	10%	19%	23%	18%	17%	20%	24%	11%	8%	22%	18%	18%	17%	8%	30%	8%	21%
Neither poor nor good value for money	21%	19%	18%	25%	21%	23%	18%	19%	24%	20%	28%	31%	20%	16%	30%	38%	28%	13%	33%	21%
Fairly good value for money	40%	35%	39%	44%	42%	37%	45%	47%	36%	41%	39%	62%	39%	40%	32%	38%	53%	40%	42%	40%
Very good value for money	5%	3%	4%	8%	7%	4%	5%	6%	8%	2%	17%	0%	5%	6%	6%	4%	6%	4%	17%	5%
Don't know/can't say	8%	16%	5%	8%	5%	7%	11%	9%	6%	10%	6%	0%	8%	14%	6%	0%	0%	11%	0%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.22	3.10	3.06	3.46	3.28	3.14	3.35	3.42	3.19	3.15	3.65	3.54	3.17	3.26	3.11	3.21	3.44	3.17	3.67	3.19
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	-£3
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 50 years	Maintain current service	£5
	99.97% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£2
	Approximately 214 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	<50p
	66 properties at risk of low water pressure at the tap. Supplies to no properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 0 the number of properties at risk of low water pressure. 50 properties affected by unplanned interruptions	<50p
	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.3% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	Maintain current service	£0
	Fish and wildlife at 1 sites suffer from low water levels caused by abstraction of water	Reduce amount of abstraction at 1 sites; plus water levels at 1 sites will be restored and protected enabling fish and wildlife to thrive	£2
WATER BILL - FROM £88 IN 2010 TO £93 IN 2014/5			£5
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	£23
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£0
	251 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 141 properties at risk of internal flooding from sewers at least once in ten years	£6
	2,841 areas at risk of external flooding from sewers at least once in ten years	4,560 areas at risk of external flooding from sewers at least once in ten years	£2
	Sewerage system could occasionally be disrupted e.g. by extreme events	Maintain current service	£0
	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 290km of river can better support fish and 320km can better support other wildlife: plus 1 wetland and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£33
	SEWERAGE BILL - FROM £230 IN 2010 TO £281 IN 2014/5		
TOTAL COMBINED BILL - FROM £318 IN 2010 TO £374 BY 2014/5			£55



Q19. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN FOR WATER SERVICES AND THE IMPACTS ON YOUR WATER BILL?

Table with 16 columns: Response, Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban).

Q20. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS UNACCEPTABLE?

Table with 16 columns: Reason, Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban).

Q21. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS ACCEPTABLE?

Table with 16 columns: Reason, Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban).

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE BILL?

Table with 16 columns: Response, Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban).

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE SERVICES IS UNACCEPTABLE?

Table with 16 columns: Reason, Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban).



Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	*%	3%	31%	38%	19%	8%	254
Ensure a reliable and continuous water supply	2%	4%	24%	47%	16%	6%	254
Ensure the safety of tap water – drinking water quality	1%	5%	26%	46%	18%	4%	254
Manage the appearance, taste and smell of tap water	1%	6%	28%	40%	21%	4%	254
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	5%	29%	36%	21%	7%	254
Handle customers' accounts, queries, complaints and customers with special needs	2%	3%	44%	29%	15%	7%	254
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	7%	34%	33%	15%	8%	254
Manage the amount of water taken from the environment to supply customers	2%	6%	40%	31%	14%	7%	254
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	11%	32%	30%	16%	9%	254
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	7%	38%	31%	17%	5%	254
Avoid risk of homes being flooded with sewage	2%	7%	43%	28%	16%	6%	254
Avoid risk of properties being flooded with sewage outside the home	1%	9%	37%	29%	19%	6%	254
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	7%	37%	31%	16%	7%	254
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	7%	37%	31%	15%	7%	254
TOTAL	2%	6%	34%	34%	17%	7%	254

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.78	3.50	3.78	3.89	3.84	3.76	3.77	3.93	3.72	3.76	4.17	3.67	3.77	3.71	3.76	3.52	4.03	3.80	3.83	3.78
Ensure a reliable and continuous water supply	3.76	3.72	3.73	3.81	3.76	3.72	3.85	3.80	3.76	3.72	3.89	3.69	3.75	3.62	3.64	3.33	3.72	4.01	3.75	3.76
Ensure the safety of tap water – drinking water quality	3.77	3.67	3.71	3.88	3.70	3.76	3.86	3.89	3.71	3.76	4.06	3.85	3.75	3.76	3.72	3.71	3.81	3.80	3.83	3.77
Manage the appearance, taste and smell of tap water	3.77	3.36	3.79	3.87	3.66	3.82	3.77	3.98	3.78	3.66	4.11	3.69	3.75	3.91	3.83	3.29	3.97	3.71	3.83	3.77
Manage the pressure of water in your taps and the number of unplanned interruptions	3.74	3.45	3.71	3.88	3.83	3.74	3.64	4.07	3.66	3.66	4.33	3.77	3.69	3.81	3.78	3.71	3.83	3.65	3.92	3.73
Handle customers' accounts, queries, complaints and customers with special needs	3.58	3.24	3.54	3.73	3.52	3.61	3.55	3.91	3.52	3.47	4.11	3.50	3.54	3.65	3.51	3.41	3.69	3.57	4.00	3.55
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.57	3.55	3.43	3.74	3.52	3.56	3.65	3.93	3.55	3.41	4.17	3.92	3.51	3.78	3.57	3.17	3.68	3.54	3.67	3.57
Manage the amount of water taken from the environment to supply customers	3.53	3.41	3.41	3.69	3.51	3.54	3.55	3.73	3.57	3.39	4.17	3.67	3.48	3.48	3.54	3.23	3.77	3.54	4.08	3.50
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.50	3.45	3.49	3.52	3.40	3.53	3.54	3.59	3.56	3.40	4.00	3.92	3.43	3.50	3.64	3.21	3.64	3.46	3.75	3.49
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.57	3.39	3.67	3.52	3.56	3.55	3.60	3.55	3.51	3.63	4.06	4.00	3.50	3.49	3.54	3.38	3.80	3.58	3.75	3.56
Avoid risk of homes being flooded with sewage	3.53	3.16	3.58	3.59	3.57	3.53	3.49	3.53	3.55	3.51	4.22	3.55	3.48	3.36	3.48	3.38	3.79	3.58	3.92	3.51
Avoid risk of properties being flooded with sewage outside the home	3.58	3.25	3.60	3.67	3.58	3.55	3.67	3.59	3.59	3.56	4.39	3.58	3.52	3.48	3.65	3.29	3.74	3.61	4.00	3.56
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.57	3.34	3.58	3.63	3.65	3.51	3.63	3.50	3.59	3.59	4.06	3.50	3.54	3.43	3.62	3.52	3.83	3.53	3.83	3.56
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.56	3.40	3.58	3.57	3.50	3.56	3.62	3.57	3.57	3.53	4.06	3.36	3.53	3.61	3.67	3.29	3.68	3.50	3.92	3.54
TOTAL	3.63	3.42	3.61	3.71	3.61	3.62	3.66	3.76	3.62	3.57	4.13	3.69	3.59	3.61	3.64	3.39	3.78	3.64	3.86	3.62
No of respondents	254	30	109	92	55	123	56	46	95	92	18	12	200	45	46	23	35	85	12	222

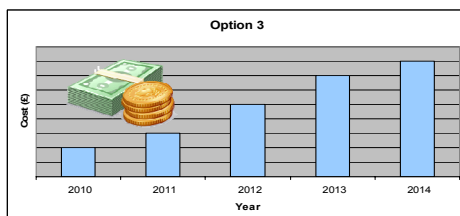
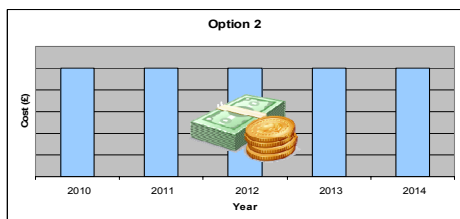
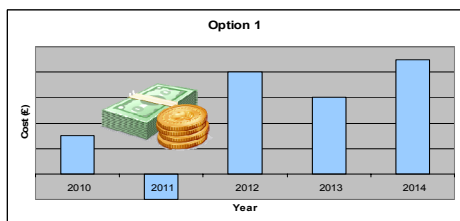
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	21%	8%	24%	23%	33%	19%	15%	17%	29%	16%	28%	46%	19%	12%	16%	29%	39%	20%	58%	19%
Ensure a reliable and continuous water supply	50%	43%	46%	58%	49%	54%	42%	55%	56%	42%	72%	54%	48%	64%	42%	33%	64%	46%	42%	50%
Ensure the safety of tap water – drinking water quality	60%	57%	61%	59%	63%	56%	66%	70%	52%	63%	61%	69%	60%	64%	50%	54%	58%	65%	83%	59%
Manage the appearance, taste and smell of tap water	40%	49%	44%	32%	37%	45%	31%	45%	37%	41%	33%	38%	41%	48%	30%	54%	28%	41%	0%	42%
Manage the pressure of water in your taps and the number of unplanned interruptions	11%	14%	11%	11%	7%	14%	8%	11%	14%	9%	0%	8%	11%	10%	10%	17%	6%	13%	0%	12%
Handle customers' accounts, queries, complaints and customers with special needs	9%	14%	12%	4%	12%	10%	6%	4%	8%	13%	6%	15%	10%	8%	12%	8%	14%	7%	0%	10%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	5%	3%	5%	4%	5%	2%	4%	6%	2%	0%	0%	4%	6%	8%	0%	3%	2%	0%	4%
Manage the amount of water taken from the environment to supply customers	*%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	8%	7%	3%	4%	7%	5%	0%	4%	10%	0%	0%	6%	4%	12%	8%	0%	4%	0%	6%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	14%	16%	16%	11%	7%	13%	23%	2%	13%	20%	6%	0%	16%	14%	30%	13%	0%	11%	8%	14%
Avoid risk of homes being flooded with sewage	9%	5%	10%	8%	9%	9%	8%	9%	5%	12%	6%	0%	10%	8%	14%	4%	6%	9%	0%	9%
Avoid risk of properties being flooded with sewage outside the home	2%	0%	2%	4%	0%	4%	0%	6%	1%	2%	0%	0%	3%	4%	2%	4%	0%	2%	8%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	3%	0%	6%	1%	4%	3%	3%	4%	2%	4%	0%	0%	3%	0%	0%	0%	8%	5%	0%	3%
Bills show one big change in first year, then stay the same for the following four years	19%	22%	20%	16%	12%	22%	16%	17%	20%	18%	11%	15%	19%	16%	20%	17%	22%	18%	0%	19%
Bills change steadily every year, so that customers do not see big changes from year to year	78%	78%	74%	83%	84%	75%	81%	79%	78%	78%	89%	85%	78%	84%	80%	83%	69%	77%	100%	77%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	37	114	99	57	135	62	47	101	105	18	13	218	50	50	24	36	94	12	242



3.6 Other Company Information

GENDER

	Total
Male	48%
Female	52%
No of respondents	254

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	56%
Jointly responsible for household finances along with spouse/partner	35%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	4%
Payment through Council rent/social housing	3%
Other	0%
Refused	0%
No of respondents	254

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	37%
Employed Part-time (9-29 hours)	9%
Retired	32%
Not working and not looking for work	11%
Student	3%
Not working and looking for work	5%
Other	0%
Refused	2%
No of respondents	254

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	*%
B	9%
C	17%
D	11%
E	5%
F	2%
G	0%
H	*%
Don't know	56%
No of respondents	254

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	3%
Don't increase / should reduce charges	6%
Generally receive good level of service / happy with service	*%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	1%
Solve the water pressure problem	*%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	2%
Deal with hard water / lime scale problem	*%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	*%
Increase in charges should be linked to improvements	1%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	2%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	*%
Other	*%
None	77%
Don't know	5%
Refused	0%
No of respondents	254

**Please note: multiple responses were allowed in this question

1. Key Findings

Severn Trent Water is a water and sewerage company billing 3,075,500 properties for water and 3,499,640 properties for sewerage services.

Uninformed Views of Current and Future Services

90% of customers stated that they were **satisfied** with the services provided by Severn Trent Water, whereas 5% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (38%), there were no problems with the services (33%) and that the water was good quality/clean (16%). The main reasons that customers were dissatisfied were that it was too expensive already (33%), the water services were poor/unreliable (27%) and that the prices are always increasing (20%).

62% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (42%), they valued the service (40%) and the service was worth the money (15%). 16% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (70%).

Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 74% felt that the overall company plan was **acceptable**, 24% felt that it was **unacceptable**, and 3% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

67% of customers stated that the current water service was **good value for money**, 65% stated the current sewerage service was good value for money, and 67% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (42%), they valued the service (40%) and the service was worth the money (16%).

13% of customers stated that the current water service was **poor value for money**, 14% stated the current sewerage service was poor value for money, and 12% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (69%) and that they opposed paying so much to companies who make large profits (19%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.59 for **water** services, 3.56 for **sewerage** services, and 3.59 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

77% of customers felt that Severn Trent Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (57%) and they valued the improvements (32%).

21% of customers felt that Severn Trent Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (57%), they opposed paying more to companies who make large profits (16%) and that the improvements are not worth the money (13%).

83% of customers felt that Severn Trent Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (62%) and they valued the improvements (29%).

15% of customers felt that Severn Trent Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (48%), they opposed paying more to companies who make large profits (23%) and that they cannot afford it (11%).

80% of customers felt that Severn Trent Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (60%) and they valued the improvements (30%).

18% of customers felt that Severn Trent Water's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (51%), they opposed paying more to companies who make large profits (17%) and that the improvements are not worth the money (13%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.64 for **water** services, 3.99 for **sewerage** services, and 3.72 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 62% (water service), 78% (sewerage) and 68% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 16% (water service), 8% (sewerage service) and 15% (service overall).

Timing

90% of Severn Trent Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban: on average 3 in 100 years
	Ensure the safety of tap water - drinking water quality	99.96% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 13,250 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	1,546 properties at risk of low water pressure at the tap. Supplies to 16,454 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	90.7% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 6.3% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 3 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £144
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	1,372 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	2,729 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	370km of river of poor/bad quality, 4,470km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £141
	CURRENT AVERAGE TOTAL BILL = £285	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	1%	3%	1%	1%	1%	2%	0%	1%	1%	1%	0%	0%	1%	5%	0%	0%	0%	1%	0%	1%
Fairly poor value for money	12%	15%	11%	9%	7%	11%	18%	15%	11%	11%	17%	6%	13%	10%	13%	6%	6%	14%	6%	12%
Neither poor nor good value for money	18%	20%	21%	9%	11%	20%	19%	7%	18%	23%	10%	13%	20%	10%	7%	0%	21%	22%	31%	17%
Fairly good value for money	63%	60%	61%	76%	75%	61%	57%	64%	64%	61%	62%	77%	59%	62%	70%	82%	69%	59%	50%	64%
Very good value for money	4%	0%	5%	4%	5%	4%	4%	12%	3%	2%	10%	0%	5%	10%	10%	12%	2%	3%	0%	5%
Don't know/can't say	2%	3%	2%	1%	1%	3%	1%	0%	3%	3%	0%	4%	2%	5%	0%	0%	2%	2%	13%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	302	40	142	91	75	127	94	67	115	120	29	52	215	21	30	17	48	186	16	286

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.59	3.41	3.60	3.74	3.77	3.56	3.48	3.70	3.58	3.53	3.66	3.74	3.53	3.65	3.77	4.00	3.68	3.49	3.50	3.59
No of respondents	302	40	142	91	75	127	94	67	115	120	29	52	215	21	30	17	48	186	16	286

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	-£4
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban: on average 3 in 100 years	Maintain current service	£5
	99.96% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£1
	Approximately 13,250 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	<50p
	1,546 properties at risk of low water pressure at the tap. Supplies to 16,454 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 1,100 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 500	£1
	90.7% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 6.3% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	10 assets better protected from severe weather safeguarding service for 1.4m people	£4
	Fish and wildlife at 3 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 0 sites; plus water levels at 0 sites will be restored and protected enabling fish and wildlife to thrive	<50p
WATER BILL - FROM £147 IN 2010 TO £155 IN 2014/5			£8
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	-£20
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£2
	1,372 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 612 properties at risk of internal flooding from sewers at least once in ten years	£5
	2,729 areas at risk of external flooding from sewers at least once in ten years	Reduce to 2,131 areas at risk of external flooding from sewers at least once in ten years	<50p
	Sewerage system could occasionally be disrupted e.g. by extreme events	23 assets better protected from severe weather safeguarding service	<50p
	370km of river of poor/bad quality, 4,470km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 480km of river can better support fish and 320km can better support other wildlife: plus 2 wetlands and 0 lakes are restored and protected to support wildlife; plus 0 bathing waters are improved.	£7
	SEWERAGE BILL - FROM £142 IN 2010 TO £137 IN 2014/5		
TOTAL COMBINED BILL - FROM £289 IN 2010 TO £292 BY 2014/5			£3

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	2%	4%	18%	47%	24%	6%	302
Ensure a reliable and continuous water supply	1%	10%	16%	51%	22%	1%	302
Ensure the safety of tap water – drinking water quality	1%	8%	13%	53%	23%	1%	302
Manage the appearance, taste and smell of tap water	1%	9%	16%	52%	21%	1%	302
Manage the pressure of water in your taps and the number of unplanned interruptions	1%	7%	18%	53%	19%	3%	302
Handle customers' accounts, queries, complaints and customers with special needs	1%	7%	20%	52%	19%	2%	302
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	1%	8%	17%	52%	20%	2%	302
Manage the amount of water taken from the environment to supply customers	1%	7%	18%	52%	20%	2%	302
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	1%	5%	15%	47%	30%	2%	302
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	1%	7%	15%	54%	22%	2%	302
Avoid risk of homes being flooded with sewage	1%	8%	15%	53%	22%	2%	302
Avoid risk of properties being flooded with sewage outside the home	1%	7%	17%	52%	22%	3%	302
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	7%	18%	52%	20%	2%	302
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	7%	15%	54%	21%	2%	302
TOTAL	1%	7%	16%	52%	22%	2%	302

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.92	4.06	3.89	3.93	4.00	3.84	3.94	4.06	3.86	3.90	3.86	4.08	3.89	4.24	4.04	4.12	4.00	3.83	3.73	3.93
Ensure a reliable and continuous water supply	3.84	3.92	3.84	3.92	3.95	3.83	3.75	3.86	3.89	3.79	3.82	4.02	3.79	4.14	3.97	4.00	4.17	3.69	3.44	3.87
Ensure the safety of tap water – drinking water quality	3.90	4.05	3.85	4.02	4.07	3.89	3.78	4.00	3.93	3.82	3.93	4.10	3.84	4.43	3.93	4.06	4.13	3.77	3.63	3.92
Manage the appearance, taste and smell of tap water	3.84	4.11	3.77	3.92	3.95	3.83	3.74	3.92	3.82	3.80	3.93	4.04	3.77	4.24	3.93	3.82	4.02	3.73	3.56	3.85
Manage the pressure of water in your taps and the number of unplanned interruptions	3.85	4.08	3.81	3.90	4.00	3.79	3.77	3.83	3.86	3.84	3.93	4.02	3.78	4.05	3.90	4.18	4.08	3.72	3.47	3.87
Handle customers' accounts, queries, complaints and customers with special needs	3.83	3.97	3.77	3.91	3.92	3.78	3.80	3.86	3.86	3.77	4.04	4.02	3.74	3.95	3.90	4.06	3.98	3.74	3.50	3.85
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.82	3.90	3.79	3.92	3.99	3.81	3.71	3.84	3.88	3.76	4.00	3.98	3.75	3.95	4.00	4.06	4.10	3.68	3.67	3.83
Manage the amount of water taken from the environment to supply customers	3.85	4.00	3.81	3.91	4.00	3.76	3.84	3.92	3.86	3.81	3.96	4.08	3.78	4.14	3.97	3.88	4.13	3.73	3.56	3.87
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4.02	4.16	3.94	4.10	4.22	3.94	3.98	4.16	3.96	4.00	4.18	4.10	3.97	3.90	4.07	4.24	4.10	3.98	3.88	4.03
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.92	4.03	3.84	4.04	4.03	3.87	3.87	4.00	3.96	3.82	4.11	4.06	3.84	4.19	4.17	3.94	4.15	3.78	3.44	3.94
Avoid risk of homes being flooded with sewage	3.89	4.05	3.84	3.93	4.03	3.80	3.87	3.97	3.89	3.83	3.85	4.08	3.83	3.95	4.13	4.00	4.17	3.75	3.50	3.91
Avoid risk of properties being flooded with sewage outside the home	3.88	4.03	3.87	3.89	4.01	3.83	3.83	3.92	3.88	3.86	3.89	4.06	3.82	3.95	4.10	4.00	4.15	3.76	3.50	3.91
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.85	3.97	3.78	3.96	4.01	3.76	3.82	3.92	3.86	3.80	3.93	4.06	3.77	4.19	4.03	4.06	4.08	3.70	3.60	3.86
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.89	4.13	3.86	3.89	4.07	3.77	3.89	3.94	3.88	3.86	3.82	4.10	3.83	4.00	4.07	4.00	4.04	3.79	3.53	3.91
TOTAL	3.88	4.03	3.83	3.95	4.02	3.82	3.83	3.94	3.89	3.83	3.95	4.06	3.82	4.10	4.02	4.03	4.09	3.76	3.57	3.90
No of respondents	302	34	135	88	71	122	86	64	108	113	28	50	203	21	26	17	47	174	15	270

Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

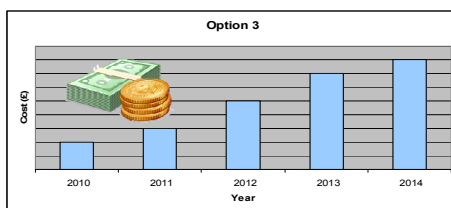
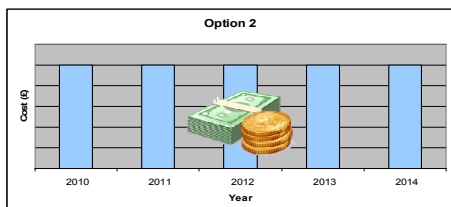
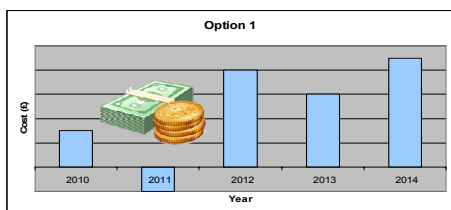
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	34%	35%	31%	38%	25%	41%	31%	27%	37%	35%	28%	42%	32%	38%	40%	35%	21%	36%	56%	33%
Ensure a reliable and continuous water supply	65%	60%	67%	62%	60%	67%	65%	57%	63%	71%	62%	77%	62%	38%	47%	59%	69%	70%	69%	65%
Ensure the safety of tap water – drinking water quality	76%	83%	79%	64%	79%	72%	78%	79%	69%	82%	69%	75%	79%	67%	73%	59%	73%	80%	75%	76%
Manage the appearance, taste and smell of tap water	30%	35%	28%	27%	25%	30%	35%	28%	32%	30%	41%	27%	30%	29%	20%	24%	33%	32%	25%	31%
Manage the pressure of water in your taps and the number of unplanned interruptions	6%	8%	7%	3%	5%	8%	5%	4%	8%	6%	7%	4%	7%	10%	3%	29%	8%	4%	0%	7%
Handle customers' accounts, queries, complaints and customers with special needs	8%	8%	11%	5%	7%	11%	5%	10%	7%	8%	0%	15%	7%	10%	3%	18%	17%	5%	6%	8%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3%	0%	3%	5%	3%	4%	3%	4%	4%	2%	7%	2%	3%	5%	10%	12%	2%	2%	0%	3%
Manage the amount of water taken from the environment to supply customers	3%	5%	4%	2%	3%	2%	4%	3%	1%	5%	0%	6%	2%	0%	10%	12%	2%	2%	0%	3%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	0%	4%	7%	4%	5%	2%	4%	2%	5%	3%	2%	4%	0%	0%	0%	6%	4%	6%	3%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	15%	28%	16%	13%	16%	11%	20%	10%	16%	18%	10%	19%	14%	10%	10%	12%	15%	17%	6%	16%
Avoid risk of homes being flooded with sewage	11%	15%	7%	13%	19%	6%	12%	10%	16%	6%	17%	8%	11%	10%	27%	12%	15%	7%	0%	11%
Avoid risk of properties being flooded with sewage outside the home	4%	5%	1%	8%	4%	2%	7%	7%	5%	2%	3%	2%	5%	14%	7%	0%	4%	3%	0%	5%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	0%	3%	2%	3%	3%	0%	0%	4%	1%	3%	4%	1%	5%	3%	6%	2%	1%	13%	1%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	0%	1%	2%	0%	2%	1%	1%	1%	1%	0%	0%	1%	10%	0%	6%	0%	0%	0%	1%
No of respondents	302	40	142	91	75	127	94	67	115	120	29	52	215	21	30	17	48	186	16	286

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	4%	5%	4%	4%	8%	2%	2%	1%	3%	6%	3%	6%	3%	5%	7%	0%	4%	3%	6%	3%
Bills show one big change in first year, then stay the same for the following four years	6%	5%	8%	5%	9%	6%	3%	6%	5%	7%	0%	8%	7%	10%	10%	6%	13%	3%	0%	6%
Bills change steadily every year, so that customers do not see big changes from year to year	90%	90%	89%	90%	83%	91%	95%	93%	92%	88%	97%	87%	90%	86%	83%	94%	83%	94%	94%	90%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	302	40	142	91	75	127	94	67	115	120	29	52	215	21	30	17	48	186	16	286



3.6 Other Company Information

GENDER

	Total
Male	50%
Female	50%
No of respondents	302

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	54%
Jointly responsible for household finances along with spouse/partner	42%
Contributor to shared household expenses (e.g. house/flatmate, parents)	1%
Payment through private rent	2%
Payment through Council rent/social housing	*%
Other	0%
Refused	0%
No of respondents	302

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	43%
Employed Part-time (9-29 hours)	13%
Retired	34%
Not working and not looking for work	6%
Student	1%
Not working and looking for work	3%
Other	0%
Refused	0%
No of respondents	302

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	11%
B	12%
C	8%
D	11%
E	3%
F	3%
G	1%
H	0%
Don't know	53%
No of respondents	302

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	2%
Don't increase / should reduce charges	3%
Generally receive good level of service / happy with service	3%
Service is reliable	1%
Want a water meter installed	1%
Improve the waters appearance / colour / quality / taste	*%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	1%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	1%
None	91%
Don't know	*%
Refused	0%
No of respondents	302

**Please note: multiple responses were allowed in this question

3.7 Views of your sewerage customers in WoC areas

For respondents views of the total water and sewerage package please refer to reports on specific water only companies.

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)?

(% who consider it fairly important/very important)

	Severn Trent Water	South Staffordshire Water
Education	91%	88%
Transport	87%	88%
Health Services	99%	98%
Crime Prevention	98%	97%
Environment	96%	94%
Cost of Living	96%	94%
Immigration	59%	79%
Water and Sewerage Services	96%	90%
Utility Services	97%	92%
TOTAL	91%	91%
No of respondents	301	252

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

	Severn Trent Water	South Staffordshire Water
Protecting the water environment	29%	33%
Improving air quality	21%	22%
Reducing climate change	44%	50%
More activity on nature conservation etc	9%	12%
Reducing litter and household waste	49%	44%
Improvements to tackling flooding	27%	17%
Encouraging people to use less water	9%	10%
No of respondents	302	253

Q4. WHICH OF THE SERVICES PROVIDED BY YOUR WATER & SEWERAGE COMPANY DO YOU FEEL ARE MOST IMPORTANT?

(multiple response question)

	Severn Trent Water	South Staffordshire Water
Providing safe, reliable, clean drinking water	93%	77%
Removal and treatment of waste water	61%	42%
Dealing with sewer flooding	26%	24%
Maintaining pipes, treatment works, and other infrastructure	42%	40%
Protecting the water environment	21%	29%
Drainage of roads	8%	17%
Dealing with customer complaints & enquiries	9%	17%
Helping to reduce greenhouse gas emissions & tackle climate change	4%	10%
No of respondents	302	253

Q7. APPROXIMATELY HOW MUCH DO YOU PAY FOR YOUR WATER AND SEWERAGE SERVICE PER YEAR?

	Severn Trent Water	South Staffordshire Water
£1 - £99	2%	2%
£100 - £199	11%	9%
£200 - £299	19%	20%
£300 - £399	29%	37%
£400 - £499	23%	17%
£500 - £599	8%	3%
£600 - £699	3%	5%
£700 - £799	2%	1%
£800 - £899	1%	1%
£900 - £999	0%	1%
£1000 +	0%	5%
TOTAL	100%	100%
No of respondents	201	198

Q8. HOW CONFIDENT ARE YOU THAT YOU HAVE ESTIMATED YOUR BILLS ACCURATELY?

	Severn Trent Water	South Staffordshire Water
Not at all confident	0%	5%
Not very confident	14%	23%
Fairly confident	71%	52%
Very confident	14%	19%
Don't know	0%	2%
TOTAL	100%	100%
No of respondents	201	198

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Severn Trent Water	South Staffordshire Water
Completely unacceptable	6%	7%
Unacceptable	18%	28%
Acceptable	69%	54%
Very acceptable	5%	10%
Don't know/can't say	3%	1%
TOTAL	100%	100%
No of respondents	302	253

Q17. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SEWERAGE SERVICE IN TERMS OF VALUE FOR MONEY?

	Severn Trent Water	South Staffordshire Water
Very poor value for money	2%	2%
Fairly poor value for money	12%	12%
Neither poor nor good value for money	19%	26%
Fairly good value for money	60%	51%
Very good value for money	5%	8%
Don't know/can't say	2%	1%
TOTAL	100%	100%
No of respondents	302	253

(1 represents very poor value for money and 5 represents very good value for money)

	Severn Trent Water	South Staffordshire Water
Mean value for money score	3.56	3.51
No of respondents	302	253

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE BILL?

	Severn Trent Water	South Staffordshire Water
Completely unacceptable	2%	4%
Unacceptable	13%	16%
Acceptable	77%	63%
Very acceptable	6%	14%
Don't know/can't say	2%	3%
TOTAL	100%	100%
No of respondents	302	253

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS UNACCEPTABLE?

	Severn Trent Water	South Staffordshire Water
I don't value the improvements	0%	6%
Improvements not worth the money	9%	8%
Too expensive already	48%	69%
Cannot afford it	11%	14%
Oppose paying so much for a natural resource	2%	2%
Oppose paying so much to companies who make large profits	23%	2%
Oppose paying more to water companies when so much water is lost in leakage	7%	0%
Other	0%	0%
Don't know/can't say	0%	0%
TOTAL	100%	100%
No of respondents	44	51

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS ACCEPTABLE?

	Severn Trent Water	South Staffordshire Water
I value the improvements	29%	11%
Improvements are worth the money	9%	19%
Plan is affordable	62%	64%
Have no choice but to pay	0%	1%
Other	0%	1%
Don't know/can't say	0%	4%
TOTAL	100%	100%
No of respondents	251	195

Q28a. VALUE FOR MONEY OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works

	Severn Trent Water	South Staffordshire Water
Very poor value for money	1%	2%
Fairly poor value for money	5%	7%
Neither poor nor good value for money	15%	28%
Fairly good value for money	47%	45%
Very good value for money	30%	17%
Don't know/can't say	2%	1%
TOTAL	100%	100%
No of respondents	302	253

Ensure a reliable and continuous sewerage service for the removal and treatment of sewage

	Severn Trent Water	South Staffordshire Water
Very poor value for money	1%	2%
Fairly poor value for money	7%	2%
Neither poor nor good value for money	15%	26%
Fairly good value for money	54%	48%
Very good value for money	22%	19%
Don't know/can't say	2%	3%
TOTAL	100%	100%
No of respondents	302	253

Avoid risk of homes being flooded with sewage

	Severn Trent Water	South Staffordshire Water
Very poor value for money	1%	1%
Fairly poor value for money	8%	6%
Neither poor nor good value for money	15%	22%
Fairly good value for money	53%	49%
Very good value for money	22%	20%
Don't know/can't say	2%	2%
TOTAL	100%	100%
No of respondents	302	253

Avoid risk of properties being flooded with sewage outside the home

	Severn Trent Water	South Staffordshire Water
Very poor value for money	1%	*%
Fairly poor value for money	7%	5%
Neither poor nor good value for money	17%	29%
Fairly good value for money	52%	45%
Very good value for money	22%	19%
Don't know/can't say	3%	2%
TOTAL	100%	100%
No of respondents	302	253

Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather

	Severn Trent Water	South Staffordshire Water
Very poor value for money	1%	1%
Fairly poor value for money	7%	4%
Neither poor nor good value for money	18%	29%
Fairly good value for money	52%	48%
Very good value for money	20%	16%
Don't know/can't say	2%	3%
TOTAL	100%	100%
No of respondents	302	253

Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast

	Severn Trent Water	South Staffordshire Water
Very poor value for money	1%	*%
Fairly poor value for money	7%	5%
Neither poor nor good value for money	15%	28%
Fairly good value for money	54%	48%
Very good value for money	21%	17%
Don't know/can't say	2%	2%
TOTAL	100%	100%
No of respondents	302	253

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Severn Trent Water	South Staffordshire Water
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4.02	3.70
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.92	3.82
Avoid risk of homes being flooded with sewage	3.89	3.83
Avoid risk of properties being flooded with sewage outside the home	3.88	3.79
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.85	3.77
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.89	3.78
No of respondents	302	253

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Severn Trent Water	South Staffordshire Water
Very poor value for money	3%	4%
Fairly poor value for money	5%	7%
Neither poor nor good value for money	13%	27%
Fairly good value for money	48%	41%
Very good value for money	30%	19%
Don't know/can't say	2%	2%
TOTAL	100%	100%
No of respondents	302	253

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Severn Trent Water	South Staffordshire Water
Total sewerage bill by 2014-15	3.99	3.65
No of respondents	302	253

1. Key Findings

South East Water is a water company billing 773,600 properties for water services. Sewerage services for South East Water are provided by Thames Water / Southern Water.

Uninformed Views of Current and Future Services

80% of customers stated that they were **satisfied** with the services provided by South East Water, whereas 8% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (44%) and that there were no problems with the service (25%). The main reasons that customers were dissatisfied were that it was too expensive already (45%) and that prices are always increasing (20%).

68% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (43%) and they valued the service (39%). 13% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (70%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by South East Water and Thames Water / Southern Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 45% felt that the overall company plan was **acceptable**, 47% felt that it was **unacceptable**, and 8% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

59% of customers stated that the current water service was **good value for money**, 58% stated the current sewerage service (provided by Thames Water / Southern Water) was good value for money, and 57% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that they valued the service (40%), the bill was affordable (35%) and the service was worth the money (20%).

20% of customers stated that the current water service was **poor value for money**, 19% stated the current sewerage service was poor value for money, and 17% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (67%) and it was not worth the money (14%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.44 for **water** services, 3.45 for **sewerage** services, and 3.45 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for South East Water's water and Thames Water's / Southern Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

51% of customers felt that South East Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that they valued the improvements (36%), the plan is affordable (29%) and the improvements are worth the money (25%).

40% of customers felt that South East Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reason being that it was too expensive already (72%).

52% of customers felt that Thames Water's / Southern Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that they valued the improvements (36%), the plan is affordable (34%) and the improvements are worth the money (23%).

38% of customers felt that Thames Water's / Southern Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reason being that it was too expensive already (70%).

51% of customers felt that South East Water's and Thames Water's / Southern Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reason being that the plan is affordable (35%) and they valued the improvements (35%).

39% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reason being that it was too expensive already (73%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.11 for South East Water's **water** services, 3.16 for Thames Water's / Southern Water's **sewerage** services, and 3.16 for services **overall**.

The proportion of customers rating the proposed DBP services as good value for money were 36% (water service), 41% (sewerage) and 41% (service overall). The proportion of customers rating the proposed DBP services as poor value for money were 26% (water service), 26% (sewerage service) and 26% (service overall).

Timing

84% of South East Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years
	Ensure the safety of tap water - drinking water quality	99.96% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 4,081 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	126 properties at risk of low water pressure at the tap. Supplies to 181 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	98% of billing enquiries answered within 5 days and 92% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £155

Southern Water

SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	251 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	2,841 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £222
	CURRENT AVERAGE TOTAL BILL = £377	



Q18a. WHAT IS THE MAIN REASON THAT YOU FEEL YOUR CURRENT OVERALL SERVICE IS POOR VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the service	2%	17%	0%	0%	0%	6%	0%	0%	5%	0%	0%	13%	0%	0%	0%	0%	10%	0%	0%	3%
Not worth the money	14%	17%	14%	14%	21%	17%	0%	25%	14%	12%	50%	0%	17%	0%	33%	0%	10%	22%	43%	9%
Too expensive already	67%	33%	64%	86%	64%	61%	80%	75%	67%	65%	50%	75%	67%	100%	33%	86%	50%	67%	43%	71%
Cannot afford it	5%	17%	5%	0%	0%	6%	10%	0%	0%	12%	0%	0%	3%	0%	0%	14%	0%	6%	0%	6%
Oppose paying so much for a natural resource	7%	0%	14%	0%	7%	6%	10%	0%	10%	6%	0%	13%	7%	0%	33%	0%	10%	6%	14%	6%
Oppose paying so much to companies who make large profits	5%	17%	5%	0%	7%	6%	0%	0%	5%	6%	0%	0%	7%	0%	0%	0%	20%	0%	0%	6%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't have any problems / complaints about the service	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't have any choice / its a necessity	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	42	6	22	14	14	18	10	4	21	17	2	8	30	4	3	7	10	18	7	35

Q18b. WHAT IS THE MAIN REASON THAT YOU FEEL YOUR CURRENT SERVICE OFFERS GOOD VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the service	40%	62%	31%	47%	34%	44%	42%	41%	38%	42%	36%	37%	41%	40%	55%	45%	31%	36%	61%	35%
Service is worth the money	20%	8%	27%	15%	22%	17%	21%	21%	13%	27%	12%	16%	24%	20%	13%	18%	31%	18%	4%	24%
Bill is affordable	35%	31%	38%	33%	40%	37%	27%	34%	44%	28%	48%	42%	31%	40%	26%	27%	34%	42%	29%	37%
I don't have any problems / complaints about the service	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't have any choice / its a necessity	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
It's less than my bill	1%	0%	1%	0%	0%	0%	3%	0%	2%	0%	0%	5%	0%	0%	3%	0%	0%	0%	4%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	3%	0%	3%	5%	4%	2%	6%	3%	4%	3%	4%	0%	4%	0%	3%	9%	3%	4%	4%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	144	13	71	60	50	59	33	29	55	60	25	19	97	15	31	11	32	55	28	116

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£24
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years	Maintain current service	£7
	99.96% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£2
	Approximately 4,081 customer complaints to water company about the appearance, taste or smell of tap water each year	Maintain current service	£0
	126 properties at risk of low water pressure at the tap. Supplies to 118 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain at 126 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 55	£0
	98% of billing enquiries answered within 5 days and 92% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	29 assets better protected from severe weather safeguarding service	£0
	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Maintain current service	£0
WATER BILL - FROM £160 IN 2010 TO £192 IN 2014/5			£32

Southern Water

SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	£23	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£0	
	251 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 141 properties at risk of internal flooding from sewers at least once in ten years	£6	
	2,841 areas at risk of external flooding from sewers at least once in ten years	4,560 areas at risk of external flooding from sewers at least once in ten years	£2	
	Sewerage system could occasionally be disrupted e.g. by extreme events	Maintain current service	£0	
	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 290km of river can better support fish and 320km can better support other wildlife; plus 1 wetland and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£33	
	SEWERAGE BILL - FROM £230 IN 2010 TO £281 IN 2014/5			£50
	TOTAL COMBINED BILL - FROM £390 IN 2010 TO £473 BY 2014/5			£82

Thames Water

SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	In addition to maintaining current service, reduce odour emissions at 8 sites	-£1
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£5
	2,630 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 1,411 properties at risk of internal flooding from sewers at least once in ten years	£3
	3,673 areas at risk of external flooding from sewers at least once in ten years	4,296 areas at risk of external flooding from sewers at least once in ten years	<50p
	Sewerage system could occasionally be disrupted e.g. by extreme events	28 sites better protected from severe weather (flooding) safeguarding service for 3 million people	<50p
	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 320km of river maintained or improved to better support fish and 120km to better support other wildlife. 1 lake restored and protected to support wildlife. Completion of the Lee Tunnel to halve sewage overflows to the Thames Tideway.	£13
	SEWERAGE BILL - FROM £113 IN 2010 TO £134 IN 2014/5		£22
TOTAL COMBINED BILL - FROM £273 IN 2010 TO £326 BY 2014/5		£54	

Q19. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN FOR WATER SERVICES AND THE IMPACTS ON YOUR WATER BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	9%	9%	6%	12%	6%	8%	12%	6%	9%	9%	0%	14%	9%	12%	5%	7%	6%	11%	9%	9%
Unacceptable	31%	21%	35%	32%	29%	28%	41%	30%	33%	31%	37%	31%	32%	23%	26%	41%	34%	32%	33%	31%
Acceptable	49%	50%	50%	48%	54%	50%	41%	55%	46%	50%	57%	50%	48%	54%	64%	45%	46%	45%	50%	49%
Very acceptable	2%	3%	1%	1%	4%	1%	0%	0%	0%	4%	0%	0%	2%	0%	2%	0%	2%	0%	2%	2%
Don't know/can't say	9%	18%	8%	8%	6%	13%	6%	9%	13%	6%	6%	6%	9%	12%	2%	7%	12%	10%	9%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	34	127	92	79	105	66	47	101	106	35	36	174	26	42	29	50	107	46	208

Q20. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	2%	0%	4%	0%	0%	3%	3%	6%	0%	2%	0%	0%	3%	0%	0%	7%	0%	2%	0%	2%
Improvements not worth the money	5%	0%	8%	3%	11%	5%	0%	0%	5%	7%	0%	0%	6%	0%	0%	7%	5%	7%	0%	6%
Too expensive already	72%	70%	71%	73%	61%	76%	80%	71%	74%	70%	77%	69%	73%	78%	69%	64%	60%	78%	68%	72%
Cannot afford it	5%	10%	2%	8%	0%	3%	11%	12%	2%	5%	0%	6%	4%	22%	8%	7%	0%	2%	16%	2%
Oppose paying more for a natural resource	3%	10%	2%	3%	7%	0%	0%	0%	2%	5%	0%	6%	3%	0%	0%	0%	10%	2%	0%	4%
Oppose paying more to companies who make large profits	11%	10%	10%	13%	21%	8%	6%	12%	14%	7%	23%	19%	7%	0%	15%	14%	20%	7%	5%	12%
Oppose paying more to water companies when so much water is lost in leakage	2%	0%	2%	3%	0%	5%	0%	0%	2%	2%	0%	0%	3%	0%	8%	0%	5%	0%	5%	1%
This should be done as a matter of course	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	1%	0%	2%	0%	0%	0%	0%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	2%	5%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	102	10	52	40	28	37	35	17	42	43	13	16	71	9	13	14	20	46	19	83

Q21. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR WATER SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	36%	33%	38%	36%	37%	33%	37%	23%	43%	37%	35%	50%	34%	29%	54%	31%	42%	28%	52%	33%
Improvements are worth the money	25%	11%	28%	27%	24%	20%	37%	31%	22%	25%	45%	6%	25%	29%	14%	31%	38%	22%	22%	25%
Plan is affordable	29%	50%	28%	22%	30%	37%	15%	27%	24%	35%	10%	28%	34%	21%	29%	23%	21%	38%	9%	34%
Everything/Prices are going up	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Have no choice but to pay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	0%	2%	0%	0%	2%	0%	4%	0%	0%	0%	6%	0%	0%	0%	0%	0%	2%	0%	1%
Don't know/can't say	9%	6%	5%	16%	9%	7%	11%	15%	11%	4%	10%	11%	7%	21%	4%	15%	0%	10%	17%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	129	18	65	45	46	54	27	26	46	57	20	18	88	14	28	13	24	50	23	106

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	35%	33%	34%	38%	39%	36%	27%	23%	46%	32%	38%	56%	30%	29%	50%	31%	38%	29%	52%	32%
Improvements are worth the money	22%	11%	23%	23%	20%	16%	38%	31%	21%	18%	29%	11%	22%	21%	18%	38%	33%	14%	22%	21%
Plan is affordable	35%	56%	36%	26%	30%	45%	23%	31%	27%	45%	24%	22%	41%	29%	29%	23%	29%	47%	9%	41%
Other	1%	0%	2%	0%	2%	0%	0%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	2%	0%	1%
Don't know/can't say	7%	0%	5%	13%	9%	4%	12%	15%	6%	4%	10%	11%	6%	21%	4%	8%	0%	8%	17%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	130	18	64	47	46	56	26	26	48	56	21	18	87	14	28	13	24	51	23	107

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	5%	7%	29%	32%	22%	5%	254
Ensure a reliable and continuous water supply	3%	9%	22%	33%	29%	4%	254
Ensure the safety of tap water – drinking water quality	4%	10%	20%	34%	26%	5%	254
Manage the appearance, taste and smell of tap water	3%	11%	23%	31%	27%	5%	254
Manage the pressure of water in your taps and the number of unplanned interruptions	4%	11%	31%	32%	22%	1%	254
Handle customers' accounts, queries, complaints and customers with special needs	2%	13%	30%	34%	19%	2%	254
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	12%	34%	33%	16%	2%	254
Manage the amount of water taken from the environment to supply customers	2%	9%	33%	36%	19%	1%	254
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	11%	32%	35%	18%	2%	254
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	11%	31%	34%	21%	1%	254
Avoid risk of homes being flooded with sewage	2%	12%	30%	34%	22%	1%	254
Avoid risk of properties being flooded with sewage outside the home	2%	11%	30%	34%	22%	1%	254
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	12%	30%	34%	20%	1%	254
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	12%	30%	33%	20%	2%	254
TOTAL	3%	11%	29%	34%	22%	2%	254

Q29. ARE THERE ANY OTHER CHANGES TO THE COMPANY PLAN THAT YOU WOULD LIKE TO SEE MADE THAT HAVE NOT BEEN COVERED?

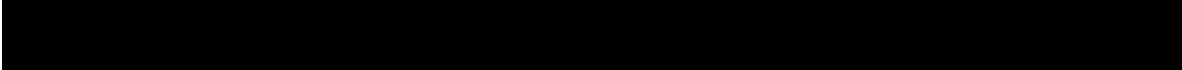
	Total
Reduce prices / charges	7%
Improve water appearance / colour / quality / taste	3%
Quicker response times	0%
Reduce number of leakages / increase repairs to pipes	0%
Improve the sewage system	0%
Generally take more responsibility	0%
Install water meters nationally	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Improve the water pressure	0%
Deal with the drainage problems/ flooding problems	0%
Give the option to install a water meter	0%
Be responsible for repairs to all pipes	0%
Have a fairer pricing / water charging scheme	0%
Increase in charges should be linked to improvements	0%
Service should be nationalized	0%
Improve water saving methods	0%
Water is too chalky / hard water / lime scale problems	0%
Improve level of service / customer service / customer information	1%
Protect nature / wildlife / environment	0%
Reduce money wastage (unspecified source)	0%
More frequent meter readings	0%
Plan should already be in action / already doing things like this	0%
Other	0%
None	73%
Don't know	10%
Refused	0%
No of respondents	254

**Please note: multiple responses were allowed in this question. Percentages show number of respondents giving an answer.

Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

(multiple response question)

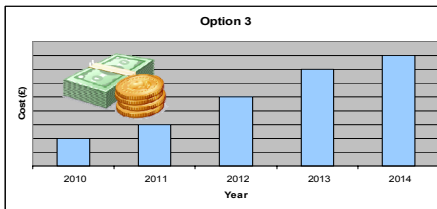
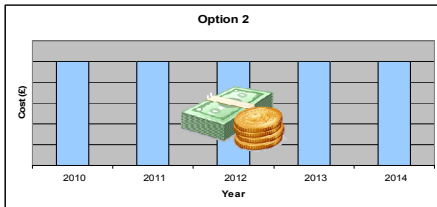
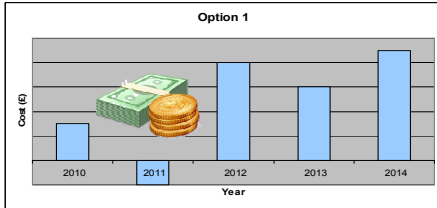
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	25%	21%	28%	23%	30%	22%	23%	19%	24%	28%	23%	31%	25%	4%	33%	28%	30%	23%	30%	24%
Ensure a reliable and continuous water supply	41%	68%	32%	42%	49%	38%	33%	32%	48%	39%	40%	42%	39%	46%	24%	38%	48%	44%	50%	39%
Ensure the safety of tap water – drinking water quality	64%	76%	59%	67%	70%	70%	50%	68%	65%	61%	77%	75%	59%	65%	76%	48%	66%	63%	74%	62%
Manage the appearance, taste and smell of tap water	30%	26%	25%	37%	28%	33%	27%	43%	26%	27%	26%	28%	30%	46%	24%	48%	14%	30%	39%	27%
Manage the pressure of water in your taps and the number of unplanned interruptions	9%	15%	9%	9%	9%	12%	6%	11%	10%	8%	14%	6%	10%	15%	12%	3%	6%	10%	9%	10%
Handle customers' accounts, queries, complaints and customers with special needs	8%	6%	9%	7%	6%	10%	8%	17%	6%	6%	9%	11%	7%	15%	7%	17%	4%	6%	2%	9%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	6%	5%	3%	3%	2%	11%	6%	2%	6%	3%	0%	5%	0%	2%	14%	0%	6%	2%	5%
Manage the amount of water taken from the environment to supply customers	6%	3%	6%	9%	9%	5%	6%	6%	8%	5%	3%	8%	7%	4%	5%	7%	8%	7%	4%	7%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	0%	6%	8%	3%	7%	9%	6%	7%	5%	9%	0%	6%	8%	5%	7%	2%	7%	4%	6%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	19%	15%	19%	20%	20%	17%	20%	17%	20%	19%	29%	28%	14%	12%	26%	21%	16%	19%	35%	15%
Avoid risk of homes being flooded with sewage	13%	12%	17%	10%	8%	15%	18%	13%	11%	16%	9%	11%	16%	8%	38%	10%	8%	8%	11%	14%
Avoid risk of properties being flooded with sewage outside the home	7%	0%	8%	8%	8%	8%	5%	9%	8%	5%	9%	14%	5%	12%	12%	7%	8%	3%	7%	7%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	0%	1%	1%	0%	2%	0%	0%	1%	1%	0%	3%	1%	0%	0%	3%	2%	0%	0%	1%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3%	0%	3%	3%	4%	4%	0%	0%	4%	3%	6%	3%	2%	4%	5%	0%	8%	0%	0%	3%
No of respondents	254	34	127	92	79	105	66	47	101	106	35	36	174	26	42	29	50	107	46	208

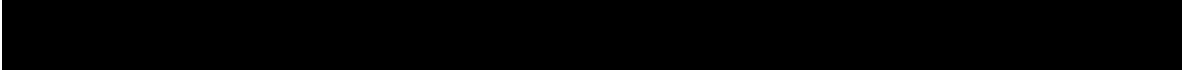


3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	8%	6%	9%	8%	9%	7%	9%	4%	7%	10%	11%	6%	7%	8%	5%	10%	8%	8%	4%	9%
Bills show one big change in first year, then stay the same for the following four years	8%	9%	7%	9%	8%	8%	8%	15%	7%	6%	11%	6%	7%	8%	14%	7%	4%	7%	11%	7%
Bills change steadily every year, so that customers do not see big changes from year to year	84%	85%	84%	84%	84%	86%	83%	81%	86%	84%	77%	89%	85%	85%	81%	83%	88%	84%	85%	84%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	254	34	127	92	79	105	66	47	101	106	35	36	174	26	42	29	50	107	46	208





3.6 Other Company Information

GENDER

	Total
Male	51%
Female	49%
No of respondents	254

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	59%
Jointly responsible for household finances along with spouse/partner	35%
Contributor to shared household expenses (e.g. house/flatmate, parents)	3%
Payment through private rent	1%
Payment through Council rent/social housing	2%
Other	0%
Refused	0%
No of respondents	254

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	40%
Employed Part-time (9-29 hours)	12%
Retired	31%
Not working and not looking for work	10%
Student	1%
Not working and looking for work	6%
Other	0%
Refused	0%
No of respondents	254

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	0%
B	5%
C	14%
D	17%
E	6%
F	5%
G	3%
H	0%
Don't know	51%
No of respondents	254

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	0%
Don't increase / should reduce charges	2%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	0%
None	61%
Don't know	33%
Refused	0%
No of respondents	254

**Please note: multiple responses were allowed in this question
South East Water

1. Key Findings

South Staffordshire Water is a water company billing 503,800 properties for water services. Sewerage Services for South Staffordshire Water are provided by Severn Trent Water.

Uninformed Views of Current and Future Services

□ 91% of customers stated that they were **satisfied** with the services provided by South Staffordshire Water, whereas 4% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (34%), there were no problems with the service (31%) and that the water was good quality/clean (19%). The main reasons that customers were dissatisfied were that it was too expensive already (27%) and that prices are always increasing (18%).

□ 60% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (43%), the service was worth the money (27%) and they valued the service (24%). 12% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (67%).

□ Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by South Staffordshire Water and Severn Trent Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 64% felt that the overall company plan was **acceptable**, 35% felt that it was **unacceptable**, and 1% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

□ 64% of customers stated that the current water service was **good value for money**, 59% stated the current sewerage service (provided by Severn Trent Water) was good value for money, and 59% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (45%), they valued the service (25%) and the service was worth the money (21%).

□ 12% of customers stated that the current water service was **poor value for money**, 14% stated the current sewerage service was poor value for money, and 11% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (57%), it was not worth the money (20%) and they don't value the service (13%).

□ The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.59 (**water** services), 3.51 (**sewerage** services), and 3.51 (services **overall**).

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for South Staffordshire Water's water and Severn Trent Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

□ 67% of customers felt that South Staffordshire Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (51%) the improvements are worth the money (24%) and they valued the improvements (19%).

□ 32% of customers felt that South Staffordshire Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (66%) and that the improvements are not worth the money (13%).

□ 77% of customers felt that Severn Trent Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (64%), the improvements are worth the money (19%) and they valued the improvements (11%).

□ 20% of customers felt that Severn Trent Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (69%) and they cannot afford it (14%).

□ 73% of customers felt that South Staffordshire Water's and Severn Trent Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (67%) and the improvements are worth the money (16%).

□ 24% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (62%), that the improvements are not worth the money (15%) and that they cannot afford it (11%).

Value for Money

□ The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.33 for South Staffordshire Water's **water** services, 3.65 for Severn Trent Water's **sewerage** services, and 3.44 for services **overall**.

□ The proportion of customers rating the proposed DBP services as good value for money were 52% (water service), 60% (sewerage) and 52% (service overall). The proportion of customers rating the proposed DBP services as poor value for money were 21% (water service), 11% (sewerage service) and 17% (service overall).

Timing

□ 80% of South Staffordshire Water's customers indicated that their preferred bill option for the period 2010-2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 40 years
	Ensure the safety of tap water - drinking water quality	99.97% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 2,987 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	No properties at risk of low water pressure at the tap. Supplies to 193 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	98.3% of billing enquiries answered within 5 days and 99.8% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 1% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 3 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £115
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	1,372 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	2,729 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	370km of river of poor/bad quality, 4,470km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £141
	CURRENT AVERAGE TOTAL BILL = £256	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	0%	1%	3%	2%	2%	1%	0%	2%	2%	0%	0%	2%	0%	0%	0%	3%	2%	0%	2%
Fairly poor value for money	10%	6%	9%	13%	4%	9%	14%	14%	9%	10%	20%	7%	10%	22%	27%	0%	0%	7%	8%	10%
Neither poor nor good value for money	25%	19%	21%	31%	24%	20%	31%	23%	28%	22%	40%	15%	26%	30%	37%	19%	21%	22%	23%	25%
Fairly good value for money	55%	65%	59%	44%	57%	57%	48%	57%	50%	57%	40%	71%	52%	46%	37%	67%	58%	58%	58%	54%
Very good value for money	9%	10%	10%	8%	13%	11%	4%	5%	10%	10%	0%	7%	10%	3%	0%	14%	18%	9%	13%	8%
Don't know/can't say	1%	0%	0%	1%	0%	1%	1%	2%	1%	0%	0%	0%	1%	0%	0%	0%	0%	2%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	253	31	135	77	46	122	83	44	92	115	10	41	199	37	30	21	38	127	40	213

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.59	3.77	3.66	3.42	3.74	3.67	3.39	3.53	3.57	3.63	3.20	3.78	3.57	3.30	3.10	3.95	3.89	3.65	3.75	3.56
No of respondents	253	31	135	77	46	122	83	44	92	115	10	41	199	37	30	21	38	127	40	213

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£11
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 40 years	Maintain current service	£3
	99.97% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	<50p
	Approximately 2,987 customer complaints to water company about the appearance, taste or smell of tap water each year	Maintain or improve complaints about tap water	£0
	No properties at risk of low water pressure at the tap. Supplies to 193 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain at 0 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 138	£0
	98.3% of billing enquiries answered within 5 days and 99.8% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 1% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	No risk of water supplies being disrupted by severe weather	£0
	Fish and wildlife at 3 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 2 sites; plus water levels at 2 sites will be restored and protected enabling fish and wildlife to thrive	£0
WATER BILL - FROM £115 IN 2010 TO £128 IN 2014/5			£13
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	-£20
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£2
	1,372 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 612 properties at risk of internal flooding from sewers at least once in ten years	£5
	2,729 areas at risk of external flooding from sewers at least once in ten years	Reduce to 2,131 areas at risk of external flooding from sewers at least once in ten years	<50p
	Sewerage system could occasionally be disrupted e.g. by extreme events	23 assets better protected from severe weather safeguarding service	<50p
	370km of river of poor/bad quality, 4,470km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 480km of river can better support fish and 320km can better support other wildlife: plus 2 wetlands and 0 lakes are restored and protected to support wildlife; plus 0 bathing waters are improved.	£7
	SEWERAGE BILL - FROM £142 IN 2010 TO £137 IN 2014/5		
TOTAL COMBINED BILL - FROM £257 IN 2010 TO £265 BY 2014/5			£8

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	4%	6%	23%	47%	17%	2%	253
Ensure a reliable and continuous water supply	2%	3%	20%	49%	23%	2%	253
Ensure the safety of tap water – drinking water quality	*%	5%	23%	49%	21%	1%	253
Manage the appearance, taste and smell of tap water	2%	2%	21%	48%	25%	2%	253
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	4%	24%	49%	19%	2%	253
Handle customers' accounts, queries, complaints and customers with special needs	1%	5%	30%	46%	17%	2%	253
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	1%	7%	31%	37%	21%	2%	253
Manage the amount of water taken from the environment to supply customers	1%	5%	24%	51%	18%	1%	253
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	7%	28%	45%	17%	1%	253
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	2%	26%	48%	19%	3%	253
Avoid risk of homes being flooded with sewage	1%	6%	22%	49%	20%	2%	253
Avoid risk of properties being flooded with sewage outside the home	*%	5%	29%	45%	19%	2%	253
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	4%	29%	48%	16%	3%	253
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	*%	5%	28%	48%	17%	2%	253
TOTAL	1%	5%	26%	47%	19%	2%	253

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.69	4.00	3.54	3.86	3.71	3.64	3.75	3.60	3.72	3.69	4.00	3.73	3.66	3.70	3.69	3.81	4.08	3.54	3.95	3.64
Ensure a reliable and continuous water supply	3.89	4.03	3.89	3.85	3.80	3.93	3.88	3.81	3.83	3.96	4.22	3.93	3.86	3.76	3.70	4.29	4.08	3.85	4.03	3.87
Ensure the safety of tap water – drinking water quality	3.87	3.97	3.85	3.88	3.84	3.91	3.83	3.74	3.83	3.97	4.22	3.88	3.85	3.81	3.73	4.19	4.11	3.80	4.05	3.84
Manage the appearance, taste and smell of tap water	3.92	3.84	3.87	4.01	3.84	3.91	3.96	4.00	3.88	3.93	4.13	4.02	3.89	4.03	3.77	4.29	4.08	3.81	4.18	3.87
Manage the pressure of water in your taps and the number of unplanned interruptions	3.82	3.81	3.83	3.86	3.78	3.81	3.87	3.88	3.80	3.82	3.63	3.83	3.83	3.81	3.87	4.10	3.89	3.75	3.89	3.81
Handle customers' accounts, queries, complaints and customers with special needs	3.73	3.74	3.71	3.80	3.76	3.71	3.78	3.70	3.75	3.72	4.22	3.85	3.68	3.51	3.80	3.86	3.82	3.74	3.82	3.72
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.72	3.61	3.74	3.77	3.59	3.76	3.77	3.74	3.78	3.66	3.50	3.78	3.72	3.57	3.59	3.95	3.86	3.72	3.74	3.72
Manage the amount of water taken from the environment to supply customers	3.81	3.84	3.76	3.89	3.89	3.78	3.82	3.86	3.83	3.76	4.11	3.83	3.79	3.70	3.67	4.10	4.00	3.77	3.92	3.79
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.70	3.58	3.67	3.86	3.73	3.66	3.74	3.88	3.69	3.64	3.89	3.76	3.69	3.65	3.57	3.90	3.92	3.65	3.77	3.69
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.82	3.81	3.76	3.93	3.87	3.79	3.85	3.91	3.85	3.75	4.13	3.95	3.78	3.68	3.64	3.86	4.00	3.85	3.95	3.80
Avoid risk of homes being flooded with sewage	3.83	3.77	3.77	3.99	3.77	3.88	3.80	3.86	3.84	3.82	4.22	3.98	3.79	3.61	3.60	4.10	4.00	3.86	3.95	3.81
Avoid risk of properties being flooded with sewage outside the home	3.79	3.70	3.77	3.86	3.66	3.81	3.83	3.93	3.75	3.76	3.56	3.88	3.78	3.64	3.67	3.81	3.81	3.85	3.74	3.79
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.77	3.68	3.79	3.80	3.78	3.79	3.73	3.88	3.74	3.75	3.63	3.75	3.78	3.68	3.62	4.05	3.84	3.77	3.78	3.77
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.78	3.70	3.76	3.86	3.73	3.82	3.77	3.88	3.81	3.72	4.00	3.88	3.75	3.67	3.57	3.95	4.00	3.77	3.72	3.79
TOTAL	3.80	3.79	3.76	3.87	3.77	3.80	3.81	3.84	3.79	3.78	3.96	3.86	3.77	3.70	3.68	4.02	3.96	3.77	3.89	3.78
No of respondents	253	30	133	74	45	119	81	43	89	113	9	40	196	37	29	21	38	122	38	209

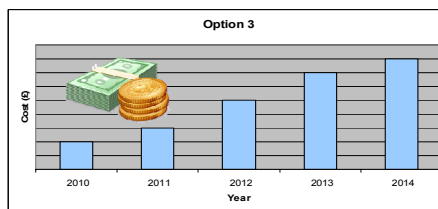
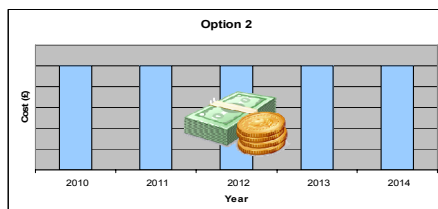
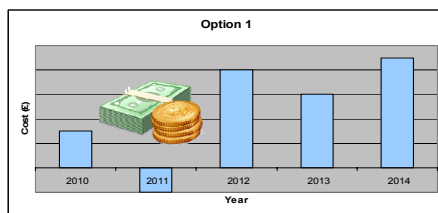
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	36%	29%	39%	34%	41%	36%	34%	30%	38%	37%	40%	37%	36%	27%	50%	38%	37%	35%	58%	32%
Ensure a reliable and continuous water supply	48%	58%	55%	38%	35%	55%	45%	41%	38%	59%	10%	41%	51%	38%	37%	52%	45%	54%	33%	51%
Ensure the safety of tap water – drinking water quality	53%	58%	53%	56%	30%	57%	60%	52%	54%	53%	50%	39%	56%	49%	73%	67%	37%	53%	38%	56%
Manage the appearance, taste and smell of tap water	21%	19%	21%	22%	17%	20%	24%	11%	25%	23%	40%	12%	23%	16%	13%	24%	32%	21%	13%	23%
Manage the pressure of water in your taps and the number of unplanned interruptions	4%	6%	2%	4%	4%	4%	2%	5%	2%	4%	20%	0%	4%	3%	3%	5%	5%	3%	3%	4%
Handle customers' accounts, queries, complaints and customers with special needs	9%	3%	13%	6%	7%	10%	11%	9%	8%	11%	0%	15%	9%	14%	10%	14%	18%	5%	0%	11%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	6%	4%	1%	4%	5%	4%	2%	4%	5%	10%	5%	4%	3%	3%	5%	5%	5%	3%	5%
Manage the amount of water taken from the environment to supply customers	4%	3%	4%	4%	9%	4%	1%	5%	5%	3%	0%	5%	4%	5%	0%	0%	11%	3%	8%	3%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	7%	0%	10%	3%	11%	7%	5%	7%	5%	9%	20%	10%	6%	5%	10%	10%	3%	8%	10%	7%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	17%	16%	16%	19%	22%	19%	13%	16%	14%	20%	20%	27%	16%	3%	10%	5%	11%	28%	20%	17%
Avoid risk of homes being flooded with sewage	9%	19%	8%	8%	13%	9%	7%	7%	14%	7%	0%	5%	11%	14%	0%	14%	11%	9%	15%	8%
Avoid risk of properties being flooded with sewage outside the home	3%	10%	3%	1%	7%	2%	2%	0%	5%	3%	0%	5%	3%	0%	7%	5%	5%	2%	3%	3%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	3%	1%	4%	0%	3%	2%	9%	0%	2%	10%	2%	2%	3%	3%	0%	3%	2%	5%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	3%	0%	1%	2%	0%	1%	0%	2%	0%	0%	0%	1%	3%	0%	0%	3%	0%	3%	0%
No of respondents	253	31	135	77	46	122	83	44	92	115	10	41	199	37	30	21	38	127	40	213

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	9%	3%	8%	10%	4%	9%	11%	14%	8%	8%	20%	10%	8%	16%	10%	10%	5%	7%	15%	8%
Bills show one big change in first year, then stay the same for the following four years	11%	19%	9%	14%	13%	15%	6%	18%	9%	11%	0%	7%	13%	5%	20%	14%	13%	10%	25%	9%
Bills change steadily every year, so that customers do not see big changes from year to year	80%	77%	83%	75%	83%	76%	83%	68%	84%	81%	80%	83%	79%	78%	70%	76%	82%	83%	60%	84%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	253	31	135	77	46	122	83	44	92	115	10	41	199	37	30	21	38	127	40	213



3.6 Other Company Information

GENDER

	Total
Male	55%
Female	45%
No of respondents	253

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	55%
Jointly responsible for household finances along with spouse/partner	42%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	1%
Payment through Council rent/social housing	*%
Other	0%
Refused	0%
No of respondents	253

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	38%
Employed Part-time (9-29 hours)	15%
Retired	30%
Not working and not looking for work	10%
Student	1%
Not working and looking for work	5%
Other	0%
Refused	0%
No of respondents	253

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	7%
B	15%
C	4%
D	6%
E	6%
F	*%
G	1%
H	1%
Don't know	60%
No of respondents	253

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	*%
Don't increase / should reduce charges	2%
Generally receive good level of service / happy with service	3%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	0%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	1%
Deal with hard water / lime scale problem	0%
Reduce bad smells	*%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	*%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	1%
None	91%
Don't know	2%
Refused	0%
No of respondents	253

**Please note: multiple responses were allowed in this question
South Staffordshire Water

1. Key Findings

South West Water is a water and sewerage company billing 674,400 properties for water and 620,242 properties for sewerage services.

Uninformed Views of Current and Future Services

78% of customers stated that they were **satisfied** with the services provided by South West Water, whereas 11% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there were no problems with the service (57%) and that the water was good quality/clean (22%). The main reasons that customers were dissatisfied was that it was too expensive already (36%), the prices are always increasing (19%) and that the water service was poor/unreliable (17%).

46% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that they valued the service (40%), the bill was affordable (34%) and the service was worth the money (22%). 29% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (64%).

Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 28% felt that the overall company plan was **acceptable**, 66% felt that it was **unacceptable**, and 7% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

42% of customers stated that the current water service was **good value for money**, 37% stated the current sewerage service was good value for money, and 38% felt that their current service overall was good value for money. (Q18b) The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (35%), the service was worth the money (31%) and they valued the service (29%).

25% of customers stated that the current water service was **poor value for money**, 31% stated the current sewerage service was poor value for money, and 28% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (76%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.24 for **water** services, 3.12 for **sewerage** services, and 3.12 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

42% of customers felt that South West Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (58%) and they valued the improvements (22%).

54% of customers felt that South West Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reason being that it was too expensive already (83%).

34% of customers felt that South West Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (60%), the improvements are worth the money (18%) and that they valued the improvements (15%).

61% of customers felt that South West Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reason being that it was too expensive already (85%).

34% of customers felt that South West Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (58%), they valued the improvements (18%) and the improvements are worth the money (16%).

60% of customers felt that South West Water's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reason being that it was too expensive already (83%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.23 for **water** services, 2.89 for **sewerage** services, and 2.92 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 44% (water service), 33% (sewerage) and 36% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 27% (water service), 41% (sewerage service) and 40% (service overall).

Timing

88% of South West Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

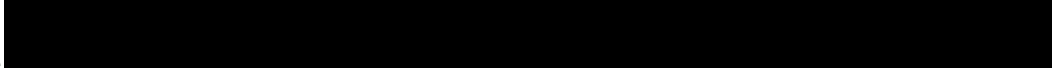
	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years
	Ensure the safety of tap water - drinking water quality	99.95% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 22,226 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	290 properties at risk of low water pressure at the tap. Supplies to 552 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	97.6% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.3% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 1 site suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £191
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	77 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	195 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	40km of river of poor/bad quality, 660km of river at risk from weed growth that can be harmful to wildlife, 3 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £277
	CURRENT AVERAGE TOTAL BILL = £468	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	4%	4%	5%	2%	13%	1%	3%	1%	3%	5%	2%	5%	4%	0%	0%	3%	8%	6%	3%	4%
Fairly poor value for money	21%	12%	26%	18%	23%	23%	19%	19%	27%	16%	22%	16%	22%	28%	13%	26%	22%	21%	20%	22%
Neither poor nor good value for money	31%	23%	30%	33%	26%	34%	27%	28%	31%	32%	29%	37%	32%	32%	34%	24%	24%	33%	30%	31%
Fairly good value for money	32%	31%	25%	39%	30%	28%	38%	36%	31%	30%	36%	32%	30%	23%	42%	29%	31%	31%	36%	31%
Very good value for money	10%	15%	11%	7%	6%	11%	10%	12%	6%	12%	9%	9%	10%	13%	8%	16%	12%	6%	9%	10%
Don't know/can't say	3%	15%	3%	1%	2%	3%	4%	4%	1%	4%	2%	2%	1%	4%	3%	3%	2%	3%	1%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	336	26	155	149	47	148	136	81	143	112	122	57	145	47	76	38	49	126	86	250

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.24	3.50	3.11	3.31	2.93	3.25	3.33	3.41	3.11	3.28	3.28	3.23	3.21	3.22	3.46	3.30	3.17	3.11	3.28	3.22
No of respondents	336	26	155	149	47	148	136	81	143	112	122	57	145	47	76	38	49	126	86	250



3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	-£5
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years	Maintain current service	£2
	99.95% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£4
	Approximately 22,226 customer complaints to water company about the appearance, taste or smell of tap water each year	15% reduction in complaints about tap water	£2
	290 properties at risk of low water pressure at the tap. Supplies to 552 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 170 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 420	£1
	97.6% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.3% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively. Increasing the number of calls resolved at first point of contact	£2
	Water supplies could occasionally be disrupted e.g. by extreme events	5 works better protected from severe weather to safeguard service	£3
	Fish and wildlife at 1 site suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 1 sites; plus water levels at 1 sites will be restored and protected enabling fish and wildlife to thrive	£2
WATER BILL - FROM £194 IN 2010 TO £205 IN 2014/5			£11
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	£10
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£2
	77 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 28 properties at risk of internal flooding from sewers at least once in ten years	<50p
	195 areas at risk of external flooding from sewers at least once in ten years	206 properties at risk of external flooding from sewers at least once in ten years	<50p
	Sewerage system could occasionally be disrupted e.g. by extreme events	44 sites better protected from severe weather, 8 investigations for improving urban drainage to cope with severe weather	£4
	40km of river of poor/bad quality, 660km of river at risk from weed growth that can be harmful to wildlife, 3 bathing waters which do not meet minimum standards	An additional: 70km of river can better support fish and 0km better support other wildlife: plus 1 wetlands and 0 lakes are restored and protected to support wildlife; plus 0 bathing waters are improved.	£6
	SEWERAGE BILL - FROM £268 IN 2010 TO £291 IN 2014/5		
TOTAL COMBINED BILL - FROM £462 IN 2010 TO £496 BY 2014/5			£34

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	3%	12%	30%	39%	15%	2%	336
Ensure a reliable and continuous water supply	1%	14%	26%	39%	18%	2%	336
Ensure the safety of tap water – drinking water quality	2%	10%	31%	34%	21%	1%	336
Manage the appearance, taste and smell of tap water	4%	8%	31%	38%	19%	1%	336
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	13%	30%	35%	17%	2%	336
Handle customers' accounts, queries, complaints and customers with special needs	1%	15%	29%	35%	18%	1%	336
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	20%	30%	32%	14%	2%	336
Manage the amount of water taken from the environment to supply customers	1%	10%	34%	33%	21%	1%	336
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	1%	18%	30%	34%	15%	1%	336
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	12%	30%	34%	21%	1%	336
Avoid risk of homes being flooded with sewage	2%	13%	32%	34%	20%	*%	336
Avoid risk of properties being flooded with sewage outside the home	2%	13%	29%	37%	16%	2%	336
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	4%	16%	32%	30%	16%	2%	336
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	8%	33%	34%	21%	1%	336
TOTAL	2%	13%	31%	35%	18%	1%	336

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.52	3.39	3.49	3.54	3.40	3.46	3.63	3.70	3.48	3.45	3.59	3.25	3.53	3.63	3.55	3.49	3.59	3.46	3.45	3.55
Ensure a reliable and continuous water supply	3.59	3.71	3.59	3.56	3.51	3.59	3.62	3.73	3.46	3.65	3.65	3.28	3.61	3.63	3.57	3.70	3.67	3.52	3.42	3.65
Ensure the safety of tap water – drinking water quality	3.62	3.83	3.62	3.58	3.57	3.61	3.66	3.77	3.48	3.70	3.62	3.40	3.67	3.68	3.67	3.74	3.76	3.48	3.40	3.70
Manage the appearance, taste and smell of tap water	3.61	4.00	3.59	3.53	3.38	3.66	3.64	3.66	3.54	3.65	3.66	3.44	3.58	3.70	3.71	3.55	3.65	3.51	3.37	3.69
Manage the pressure of water in your taps and the number of unplanned interruptions	3.53	3.62	3.50	3.52	3.40	3.58	3.54	3.67	3.46	3.52	3.69	3.30	3.43	3.55	3.61	3.70	3.55	3.42	3.32	3.61
Handle customers' accounts, queries, complaints and customers with special needs	3.54	3.58	3.58	3.48	3.49	3.55	3.58	3.59	3.45	3.63	3.59	3.38	3.51	3.55	3.52	3.66	3.63	3.48	3.33	3.62
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.37	3.78	3.35	3.31	3.26	3.34	3.45	3.42	3.29	3.44	3.31	3.23	3.40	3.46	3.22	3.38	3.37	3.42	3.27	3.40
Manage the amount of water taken from the environment to supply customers	3.63	3.84	3.61	3.59	3.43	3.60	3.71	3.64	3.63	3.62	3.62	3.56	3.60	3.64	3.57	3.76	3.73	3.57	3.44	3.69
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.45	3.71	3.47	3.39	3.48	3.43	3.47	3.47	3.38	3.53	3.44	3.30	3.46	3.49	3.33	3.46	3.65	3.43	3.30	3.50
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.59	3.88	3.59	3.52	3.49	3.53	3.68	3.63	3.51	3.65	3.64	3.46	3.53	3.57	3.56	3.54	3.69	3.58	3.45	3.64
Avoid risk of homes being flooded with sewage	3.57	3.85	3.57	3.50	3.49	3.52	3.65	3.60	3.47	3.67	3.60	3.42	3.53	3.60	3.55	3.54	3.73	3.51	3.40	3.63
Avoid risk of properties being flooded with sewage outside the home	3.52	3.76	3.60	3.38	3.43	3.48	3.59	3.49	3.42	3.66	3.53	3.40	3.47	3.55	3.37	3.54	3.73	3.50	3.44	3.55
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.38	3.71	3.35	3.35	3.17	3.33	3.49	3.46	3.28	3.46	3.39	3.21	3.37	3.17	3.34	3.43	3.47	3.44	3.28	3.42
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.64	3.83	3.62	3.62	3.26	3.64	3.77	3.70	3.58	3.67	3.66	3.53	3.60	3.59	3.62	3.65	3.69	3.65	3.53	3.68
TOTAL	3.54	3.75	3.54	3.49	3.41	3.52	3.60	3.61	3.46	3.59	3.57	3.37	3.52	3.56	3.51	3.58	3.64	3.50	3.38	3.59
No of respondents	336	23	154	147	47	146	132	80	141	109	121	57	141	46	75	37	49	123	85	245



Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

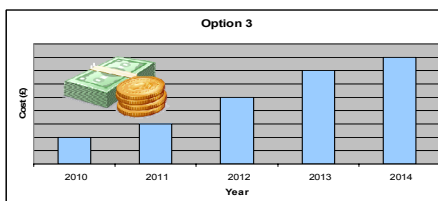
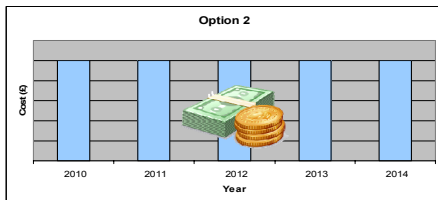
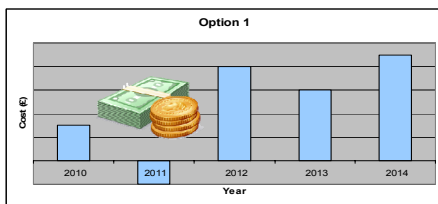
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	38%	35%	38%	39%	38%	32%	46%	48%	34%	37%	37%	44%	36%	57%	32%	45%	33%	36%	44%	36%
Ensure a reliable and continuous water supply	55%	69%	60%	49%	47%	52%	63%	51%	54%	61%	53%	49%	57%	62%	46%	71%	57%	53%	58%	54%
Ensure the safety of tap water – drinking water quality	55%	62%	52%	55%	40%	62%	51%	46%	63%	51%	55%	47%	57%	51%	64%	61%	57%	48%	51%	56%
Manage the appearance, taste and smell of tap water	24%	35%	25%	22%	28%	23%	24%	20%	25%	26%	26%	25%	22%	19%	25%	32%	29%	21%	27%	23%
Manage the pressure of water in your taps and the number of unplanned interruptions	4%	0%	6%	3%	13%	3%	3%	2%	2%	9%	2%	7%	6%	0%	5%	3%	4%	6%	2%	5%
Handle customers' accounts, queries, complaints and customers with special needs	15%	0%	14%	19%	19%	14%	13%	21%	11%	14%	17%	19%	10%	15%	16%	5%	12%	17%	12%	16%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	0%	6%	3%	9%	5%	1%	4%	3%	5%	2%	9%	4%	0%	4%	3%	4%	6%	2%	4%
Manage the amount of water taken from the environment to supply customers	3%	4%	3%	3%	2%	3%	3%	0%	4%	3%	3%	2%	3%	2%	1%	3%	4%	3%	3%	2%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	4%	2%	5%	6%	3%	3%	5%	3%	3%	3%	5%	3%	6%	4%	3%	0%	4%	3%	4%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	7%	4%	8%	5%	11%	6%	6%	10%	3%	8%	5%	9%	8%	2%	4%	5%	10%	9%	6%	7%
Avoid risk of homes being flooded with sewage	5%	8%	3%	6%	6%	5%	4%	6%	4%	4%	6%	2%	6%	9%	4%	5%	6%	3%	2%	6%
Avoid risk of properties being flooded with sewage outside the home	3%	4%	2%	4%	0%	4%	3%	2%	2%	4%	3%	4%	3%	2%	3%	0%	4%	4%	3%	3%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3%	0%	2%	5%	0%	5%	2%	4%	3%	2%	2%	4%	3%	4%	4%	3%	2%	2%	5%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3%	0%	4%	3%	11%	2%	1%	5%	3%	2%	3%	4%	3%	6%	0%	3%	6%	2%	2%	3%
No of respondents	336	26	155	149	47	148	136	81	143	112	122	57	145	47	76	38	49	126	86	250

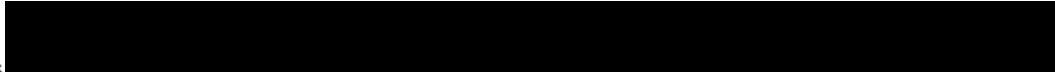
3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	5%	8%	6%	4%	9%	5%	4%	5%	5%	5%	2%	9%	6%	9%	5%	3%	4%	5%	6%	5%
Bills show one big change in first year, then stay the same for the following four years	7%	8%	6%	8%	2%	7%	9%	6%	7%	8%	5%	0%	12%	11%	7%	11%	8%	5%	8%	7%
Bills change steadily every year, so that customers do not see big changes from year to year	88%	85%	88%	88%	89%	87%	88%	89%	88%	87%	93%	91%	82%	81%	88%	87%	88%	90%	86%	88%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	336	26	155	149	47	148	136	81	143	112	122	57	145	47	76	38	49	126	86	250



South West Water notes that around half the 2014-15 bill increase presented to customers in this research is due to the impact of smoothing the profile of increases across the 5 year period. This results in a higher final bill in 2014-15. Consumers have indicated that their preference is for a smoothed bill profile



3.6 Other Company Information

GENDER

	Total
Male	44%
Female	56%
No of respondents	336

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	59%
Jointly responsible for household finances along with spouse/partner	34%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	4%
Payment through Council rent/social housing	1%
Other	0%
Refused	*%
No of respondents	336

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	31%
Employed Part-time (9-29 hours)	10%
Retired	46%
Not working and not looking for work	7%
Student	1%
Not working and looking for work	2%
Other	0%
Refused	1%
No of respondents	336

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	5%
B	9%
C	9%
D	13%
E	2%
F	*%
G	0%
H	0%
Don't know	62%
No of respondents	336

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	2%
Don't increase / should reduce charges	2%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	1%
Improve the waters appearance / colour / quality / taste	*%
Have difficulty paying water bill with limited income / pension	1%
Breakdown of billing / justifying high cost of water	1%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	1%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	1%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	1%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	*%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	*%
None	93%
Don't know	*%
Refused	0%
No of respondents	336

**Please note: multiple responses were allowed in this question
South West Water

1. Key Findings

Southern Water is a water and sewerage company billing 945,000 properties for water and 1,697,580 properties for sewerage services.

Uninformed Views of Current and Future Services

80% of customers stated that they were **satisfied** with the services provided by Southern Water, whereas 10% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (49%) and that there were no problems with the service (23%). The main reasons that customers were dissatisfied were that it was too expensive already (36%), the water was poor/unreliable (25%) and the prices are always increasing (14%).

60% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (40%), they valued the service (32%) and the service was worth the money (20%). 20% of customers stated that the current water and sewerage service was poor value for money, the main reasons being that it was too expensive already (56%) and that it was not worth the money (29%).

Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 49% felt that the overall company plan was **acceptable**, 47% felt that it was **unacceptable**, and 4% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

58% of customers stated that the current water service was **good value for money**, 55% stated the current sewerage service was good value for money, and 52% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (37%), they valued the service (30%) and the service was worth the money (27%).

17% of customers stated that the current water service was **poor value for money**, 19% stated the current sewerage service was poor value for money, and 18% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (45%) and it was not worth the money (33%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.45 for **water** services, 3.42 for **sewerage** services, and 3.40 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

51% of customers felt that Southern Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (49%), the improvements are worth the money (25%) and they valued the improvements (19%).

45% of customers felt that Southern Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (44%) and that the improvements are not worth the money (25%).

49% of customers felt that Southern Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (51%), the improvements are worth the money (24%) and they value the improvements (20%).

46% of customers felt that Southern Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (43%) and that the improvements are not worth the money (28%).

50% of customers felt that Southern Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (48%), the improvements are worth the money (25%) and they valued the improvements (21%).

45% of customers felt that Southern Water's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (39%) and that the improvements are not worth the money (30%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 2.86 for **water** services, 2.80 for **sewerage** services, and 2.83 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 30% (water service), 29% (sewerage) and 29% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 38% (water service), 40% (sewerage service) and 38% (service overall).

Timing

85% of Southern Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - target risk of hosepipe ban is once in 10 years - actual achievement is less at 4 times in ten years
	Ensure the safety of tap water - drinking water quality	99.94% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 4,167 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	386 properties at risk of low water pressure at the tap. Supplies to 142 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	96.7% of billing enquiries answered within 5 days and 64.8% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 21.4% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 1 site suffers from (or is at risk of) low water levels caused by abstraction of water
	CURRENT AVERAGE WATER BILL = £120	
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	251 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	2,841 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £222
	CURRENT AVERAGE TOTAL BILL = £342	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	2%	0%	5%	4%	1%	3%	5%	2%	1%	6%	2%	2%	10%	0%	0%	0%	1%	0%	3%
Fairly poor value for money	15%	20%	16%	13%	15%	14%	15%	17%	12%	17%	23%	13%	15%	19%	21%	10%	13%	14%	5%	17%
Neither poor nor good value for money	23%	10%	25%	23%	12%	26%	24%	27%	27%	15%	17%	19%	24%	16%	23%	21%	19%	27%	28%	22%
Fairly good value for money	51%	54%	50%	52%	54%	51%	52%	45%	52%	54%	46%	54%	51%	52%	53%	55%	53%	48%	56%	50%
Very good value for money	7%	12%	6%	5%	15%	5%	3%	6%	7%	6%	9%	12%	5%	3%	2%	10%	15%	6%	8%	6%
Don't know/can't say	2%	2%	4%	1%	0%	3%	3%	0%	0%	6%	0%	0%	3%	0%	0%	3%	0%	5%	3%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	302	50	135	111	67	126	103	82	108	112	35	52	199	58	43	29	47	125	39	263

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.45	3.55	3.48	3.40	3.60	3.46	3.39	3.30	3.51	3.51	3.29	3.60	3.44	3.19	3.37	3.68	3.70	3.46	3.68	3.42
No of respondents	302	50	135	111	67	126	103	82	108	112	35	52	199	58	43	29	47	125	39	263

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015	
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£12	
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - target risk of hosepipe ban is once in 10 years - actual achievement is less at 4	Improve supplies to achieve the target level of hosepipe bans of once in 10 years	£10	
	99.94% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£6	
	Approximately 4,167 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0	
	386 properties at risk of low water pressure at the tap. Supplies to 142 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 385 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 140	£0	
	96.7% of billing enquiries answered within 5 days and 64.8% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 21.4% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0	
	Water supplies could occasionally be disrupted e.g. by extreme events	3 assets better protected from severe weather safeguarding service	£0	
	Fish and wildlife at 1 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 1 site; plus water levels at 1 site will be restored and protected enabling fish and wildlife to thrive	£0	
	WATER BILL - FROM £122 IN 2010 TO £146 IN 2014/5			£24
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	£23	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£0	
	251 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 141 properties at risk of internal flooding from sewers at least once in ten years	£6	
	2,841 areas at risk of external flooding from sewers at least once in ten years	4,560 areas at risk of external flooding from sewers at least once in ten years	£2	
	Sewerage system could occasionally be disrupted e.g. by extreme events	Maintain current service	£0	
	180km of river of poor/bad quality, 1,200km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 290km of river can better support fish and 320km can better support other wildlife; plus 1 wetland and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£33	
	SEWERAGE BILL - FROM £230 IN 2010 TO £281 IN 2014/5			£50
	TOTAL COMBINED BILL - FROM £352 IN 2010 TO £426 BY 2014/5			£74

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	1%	8%	30%	42%	17%	2%	302
Ensure a reliable and continuous water supply	1%	11%	27%	42%	18%	1%	302
Ensure the safety of tap water – drinking water quality	2%	11%	25%	40%	23%	*%	302
Manage the appearance, taste and smell of tap water	3%	12%	25%	41%	20%	*%	302
Manage the pressure of water in your taps and the number of unplanned interruptions	1%	15%	28%	37%	19%	*%	302
Handle customers' accounts, queries, complaints and customers with special needs	2%	18%	29%	39%	10%	1%	302
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	15%	33%	39%	9%	2%	302
Manage the amount of water taken from the environment to supply customers	2%	12%	31%	40%	13%	1%	302
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	15%	32%	36%	13%	1%	302
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	1%	14%	26%	40%	16%	2%	302
Avoid risk of homes being flooded with sewage	2%	15%	31%	35%	15%	2%	302
Avoid risk of properties being flooded with sewage outside the home	1%	15%	31%	36%	14%	2%	302
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	16%	30%	38%	13%	2%	302
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	15%	30%	38%	15%	1%	302
TOTAL	2%	14%	29%	39%	15%	1%	302

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.66	3.68	3.65	3.71	3.70	3.69	3.58	3.64	3.64	3.71	3.58	3.75	3.67	3.68	3.36	3.75	3.66	3.74	3.74	3.65
Ensure a reliable and continuous water supply	3.66	3.58	3.67	3.65	3.61	3.67	3.68	3.63	3.61	3.74	3.71	3.67	3.66	3.62	3.43	3.83	3.72	3.70	3.92	3.62
Ensure the safety of tap water – drinking water quality	3.71	3.52	3.71	3.79	3.69	3.77	3.65	3.68	3.70	3.74	3.86	3.86	3.66	3.64	3.57	4.07	3.68	3.72	3.92	3.68
Manage the appearance, taste and smell of tap water	3.64	3.42	3.68	3.72	3.60	3.71	3.58	3.52	3.62	3.75	3.91	3.78	3.56	3.50	3.52	3.86	3.68	3.68	3.85	3.61
Manage the pressure of water in your taps and the number of unplanned interruptions	3.59	3.42	3.71	3.49	3.61	3.69	3.46	3.43	3.58	3.72	3.63	3.83	3.54	3.36	3.26	3.97	3.81	3.65	3.89	3.55
Handle customers' accounts, queries, complaints and customers with special needs	3.39	3.38	3.47	3.31	3.42	3.46	3.27	3.30	3.42	3.43	3.29	3.65	3.34	3.33	3.12	3.79	3.57	3.35	3.54	3.37
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.40	3.29	3.44	3.39	3.42	3.43	3.34	3.36	3.36	3.46	3.62	3.37	3.35	3.36	3.00	3.61	3.55	3.44	3.50	3.38
Manage the amount of water taken from the environment to supply customers	3.50	3.40	3.56	3.48	3.51	3.57	3.42	3.48	3.45	3.57	3.63	3.54	3.47	3.35	3.21	3.96	3.74	3.47	3.61	3.48
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.43	3.38	3.49	3.37	3.51	3.46	3.35	3.34	3.45	3.48	3.60	3.41	3.40	3.34	3.24	3.59	3.57	3.44	3.54	3.41
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.57	3.55	3.67	3.46	3.54	3.64	3.51	3.44	3.52	3.72	3.63	3.58	3.56	3.48	3.36	3.90	3.66	3.58	3.61	3.57
Avoid risk of homes being flooded with sewage	3.48	3.46	3.56	3.46	3.42	3.54	3.44	3.42	3.40	3.59	3.62	3.57	3.43	3.46	3.38	3.59	3.72	3.40	3.37	3.49
Avoid risk of properties being flooded with sewage outside the home	3.47	3.49	3.53	3.46	3.44	3.53	3.44	3.43	3.36	3.61	3.63	3.53	3.43	3.45	3.31	3.79	3.66	3.40	3.34	3.49
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.48	3.45	3.58	3.41	3.52	3.51	3.44	3.43	3.42	3.58	3.53	3.59	3.45	3.52	3.33	3.81	3.66	3.38	3.47	3.48
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.51	3.48	3.57	3.50	3.45	3.62	3.42	3.49	3.37	3.65	3.63	3.63	3.46	3.53	3.31	3.83	3.61	3.46	3.49	3.51
TOTAL	3.54	3.46	3.59	3.51	3.53	3.59	3.47	3.47	3.49	3.63	3.63	3.50	3.47	3.31	3.81	3.67	3.53	3.63	3.52	
No of respondents	302	50	134	106	66	124	100	77	107	112	31	51	198	56	42	28	47	123	38	258

1. Key Findings

Sutton & East Surrey Water is a water company billing 250,600 properties for water services. Sewerage services for Sutton & East Surrey Water are provided by Thames Water.

Uninformed Views of Current and Future Services

86% of customers stated that they were **satisfied** with the services provided by Sutton & East Surrey Water, whereas 4% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (41%) and that there were no problems with the service (37%). The main reasons that customers were dissatisfied were that prices are always increasing (33%), it was too expensive already (22%) and that the service was poor/unreliable (22%).

61% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (42%), the service was worth the money (34%) and that they valued the service (22%). 17% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was not worth the money (47%) and that it was too expensive already (35%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Sutton & East Surrey Water and Thames Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 53% felt that the overall company plan was **acceptable**, 36% felt that it was **unacceptable**, and 12% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

65% of customers stated that the current water service was **good value for money**, 65% stated the current sewerage service (provided by Thames Water) was good value for money, and 63% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the service was worth the money (41%), the bill was affordable (39%) and they valued the service (17%).

10% of customers stated that the current water service was **poor value for money**, 9% stated the current sewerage service was poor value for money, and 10% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was not worth the money (60%) and it was too expensive already (20%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.85 for **water** services, 3.93 for **sewerage** services, and 3.76 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Sutton & East Surrey Water's water and Thames Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

55% of customers felt that Sutton & East Surrey Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reason being that the plan is affordable (71%).

35% of customers felt that Sutton & East Surrey Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (49%) and that the improvements are not worth the money (18%).

55% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (69%) and the improvements are worth the money (19%).

35% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (44%), the improvements are not worth the money (28%) and that they don't value the improvements (16%).

55% of customers felt that Sutton & East Surrey Water's and Thames Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reason being that the plan is affordable (70%).

35% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (48%) and that the improvements are not worth the money (29%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.43 for Sutton & East Surrey Water's **water** services, 3.40 for Thames Water's **sewerage** services, and 3.35 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 52% (water service), 52% (sewerage) and 52% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 27% (water service), 27% (sewerage service) and 29% (service overall).

Timing

60% of Sutton & East Surrey Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year, whereas 29% would like bills to show one big change in the first year, then stay the same for the following four years (29%).

Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

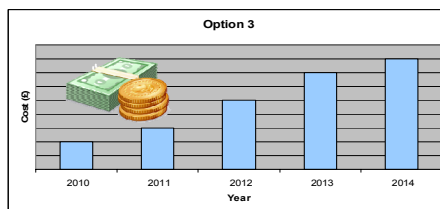
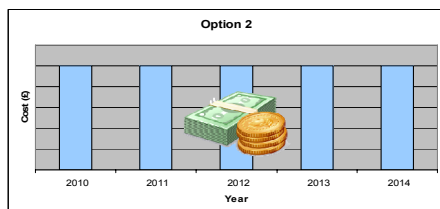
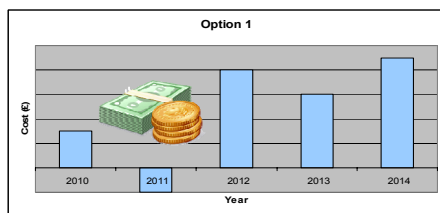
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	18%	10%	18%	23%	21%	17%	17%	22%	19%	13%	20%	19%	15%	28%	23%	21%	15%	12%	18%	18%
Ensure a reliable and continuous water supply	56%	58%	59%	50%	51%	55%	61%	40%	60%	63%	49%	52%	58%	43%	53%	38%	60%	66%	85%	52%
Ensure the safety of tap water – drinking water quality	54%	48%	54%	57%	37%	56%	64%	54%	52%	57%	66%	58%	51%	59%	63%	72%	51%	46%	64%	53%
Manage the appearance, taste and smell of tap water	33%	32%	35%	32%	27%	34%	35%	33%	36%	31%	40%	38%	30%	36%	33%	24%	34%	34%	33%	33%
Manage the pressure of water in your taps and the number of unplanned interruptions	3%	4%	4%	1%	4%	2%	3%	2%	1%	5%	3%	6%	3%	5%	2%	7%	2%	2%	0%	3%
Handle customers' accounts, queries, complaints and customers with special needs	8%	10%	7%	5%	9%	7%	9%	5%	7%	11%	6%	13%	8%	14%	14%	7%	4%	5%	0%	9%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	0%	4%	6%	7%	2%	3%	4%	6%	2%	11%	6%	3%	3%	5%	3%	4%	4%	5%	4%
Manage the amount of water taken from the environment to supply customers	3%	0%	3%	3%	6%	2%	2%	1%	4%	3%	0%	2%	4%	3%	0%	3%	2%	3%	5%	2%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	2%	3%	2%	1%	3%	2%	4%	1%	3%	3%	0%	3%	5%	2%	0%	2%	2%	0%	3%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	9%	16%	5%	12%	9%	9%	11%	10%	10%	8%	6%	6%	11%	7%	7%	7%	6%	13%	15%	8%
Avoid risk of homes being flooded with sewage	6%	10%	4%	8%	6%	8%	5%	10%	4%	6%	3%	4%	7%	7%	12%	7%	2%	6%	3%	7%
Avoid risk of properties being flooded with sewage outside the home	2%	0%	1%	4%	1%	2%	2%	6%	0%	1%	0%	0%	3%	0%	5%	3%	2%	2%	0%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	4%	1%	3%	3%	1%	4%	4%	3%	1%	0%	2%	3%	2%	2%	0%	2%	3%	5%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3%	4%	2%	4%	4%	2%	4%	5%	4%	1%	0%	0%	4%	2%	5%	7%	4%	2%	3%	3%
No of respondents	302	50	135	111	67	126	103	82	108	112	35	52	199	58	43	29	47	125	39	263

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	7%	10%	7%	6%	10%	9%	4%	7%	4%	11%	11%	12%	5%	12%	0%	3%	17%	5%	5%	8%
Bills show one big change in first year, then stay the same for the following four years	8%	6%	9%	7%	3%	10%	8%	11%	7%	5%	3%	4%	10%	7%	12%	17%	6%	5%	0%	9%
Bills change steadily every year, so that customers do not see big changes from year to year	85%	84%	84%	86%	87%	81%	88%	82%	89%	84%	86%	85%	86%	81%	88%	79%	77%	90%	95%	84%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	302	50	135	111	67	126	103	82	108	112	35	52	199	58	43	29	47	125	39	263



3.6 Other Company Information

GENDER

	Total
Male	49%
Female	51%
No of respondents	302

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	68%
Jointly responsible for household finances along with spouse/partner	26%
Contributor to shared household expenses (e.g. house/flatmate, parents)	3%
Payment through private rent	3%
Payment through Council rent/social housing	0%
Other	0%
Refused	0%
No of respondents	302

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	35%
Employed Part-time (9-29 hours)	14%
Retired	33%
Not working and not looking for work	7%
Student	4%
Not working and looking for work	6%
Other	0%
Refused	1%
No of respondents	302

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	4%
B	11%
C	12%
D	14%
E	3%
F	1%
G	*%
H	*%
Don't know	55%
No of respondents	302

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	1%
Don't increase / should reduce charges	3%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	*%
Improve the waters appearance / colour / quality / taste	*%
Have difficulty paying water bill with limited income / pension	*%
Breakdown of billing / justifying high cost of water	1%
Solve the water pressure problem	*%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	1%
Solve the problems that cause flooding	*%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	11%
None	82%
Don't know	0%
Refused	0%
No of respondents	302

**Please note: multiple responses were allowed in this question

3.7 Views of your sewerage customers in WoC areas

For respondents views of the total water and sewerage package please refer to reports on specific water only companies.

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)?

(% who consider it fairly important/very important)

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Education	87%	86%	75%	86%	91%
Transport	84%	85%	68%	85%	90%
Health Services	96%	89%	81%	92%	92%
Crime Prevention	91%	87%	74%	90%	91%
Environment	92%	90%	80%	92%	92%
Cost of Living	95%	95%	78%	94%	94%
Immigration	60%	73%	53%	63%	72%
Water and Sewerage Services	93%	96%	83%	94%	92%
Utility Services	96%	96%	81%	92%	91%
TOTAL	88%	89%	75%	88%	90%
No of respondents	302	250	251	250	285

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Protecting the water environment	33%	27%	20%	19%	23%
Improving air quality	38%	16%	36%	35%	39%
Reducing climate change	42%	38%	43%	54%	31%
More activity on nature conservation etc	10%	24%	19%	10%	28%
Reducing litter and household waste	27%	33%	38%	34%	26%
Improvements to tackling flooding	6%	11%	9%	13%	27%
Encouraging people to use less water	8%	15%	6%	9%	17%
No of respondents	302	253	254	254	293

Q4. WHICH OF THE SERVICES PROVIDED BY YOUR WATER & SEWERAGE COMPANY DO YOU FEEL ARE MOST IMPORTANT?

(multiple response question)

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Providing safe, reliable, clean drinking water	85%	81%	64%	81%	61%
Removal and treatment of waste water	46%	43%	52%	42%	50%
Dealing with sewer flooding	20%	15%	26%	18%	29%
Maintaining pipes, treatment works, and other infrastructure	26%	34%	30%	36%	39%
Protecting the water environment	18%	12%	17%	26%	34%
Drainage of roads	14%	10%	16%	14%	20%
Dealing with customer complaints & enquiries	17%	23%	15%	15%	26%
Helping to reduce greenhouse gas emissions & tackle climate change	8%	21%	18%	14%	22%
No of respondents	302	253	254	254	293

Q7. APPROXIMATELY HOW MUCH DO YOU PAY FOR YOUR WATER AND SEWERAGE SERVICE PER YEAR?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
£1 - £99	5%	3%	7%	1%	1%
£100 - £199	10%	11%	8%	8%	23%
£200 - £299	18%	14%	15%	17%	10%
£300 - £399	27%	16%	24%	22%	19%
£400 - £499	25%	18%	21%	24%	20%
£500 - £599	5%	9%	8%	6%	8%
£600 - £699	4%	17%	4%	9%	7%
£700 - £799	1%	3%	4%	3%	5%
£800 - £899	1%	2%	3%	2%	3%
£900 - £999	1%	4%	1%	1%	0%
£1000 +	4%	3%	5%	6%	2%
TOTAL	100%	100%	100%	100%	100%
No of respondents	173	119	75	155	98

Q8. HOW CONFIDENT ARE YOU THAT YOU HAVE ESTIMATED YOUR BILLS ACCURATELY?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Not at all confident	3%	12%	3%	6%	6%
Not very confident	14%	16%	20%	32%	12%
Fairly confident	64%	62%	65%	48%	53%
Very confident	16%	10%	9%	12%	23%
Don't know	3%	0%	3%	2%	5%
TOTAL	100%	100%	100%	100%	100%
No of respondents	173	119	75	155	98

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Completely unacceptable	15%	18%	11%	15%	11%
Unacceptable	32%	34%	41%	32%	19%
Acceptable	45%	38%	38%	43%	53%
Very acceptable	4%	3%	*%	2%	8%
Don't know/can't say	4%	7%	9%	8%	9%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Q17. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SEWERAGE SERVICE IN TERMS OF VALUE FOR MONEY?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	3%	2%	6%	4%	5%
Fairly poor value for money	16%	22%	24%	15%	15%
Neither poor nor good value for money	23%	21%	24%	14%	17%
Fairly good value for money	48%	40%	32%	52%	41%
Very good value for money	7%	8%	5%	6%	14%
Don't know/can't say	4%	6%	9%	9%	7%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293
(1 represents very poor value for money and 5 represents very good value for money)					
Mean value for money score	3.42	3.32	3.06	3.45	3.47
No of respondents	302	253	254	254	293

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE BILL?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Completely unacceptable	8%	14%	3%	6%	11%
Unacceptable	38%	37%	47%	32%	18%
Acceptable	47%	41%	32%	51%	52%
Very acceptable	2%	2%	2%	1%	11%
Don't know/can't say	5%	7%	16%	10%	8%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS UNACCEPTABLE?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
I don't value the improvements	9%	3%	6%	3%	5%
Improvements not worth the money	28%	8%	8%	5%	18%
Too expensive already	43%	73%	73%	70%	64%
Cannot afford it	12%	11%	9%	7%	9%
Oppose paying so much for a natural resource	0%	0%	1%	2%	1%
Oppose paying so much to companies who make large profits	7%	3%	2%	10%	4%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	1%	2%	0%
Other	0%	0%	1%	0%	0%
Don't know/can't say	1%	2%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%
No of respondents	139	128	127	98	85

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS ACCEPTABLE?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
I value the improvements	20%	18%	53%	36%	11%
Improvements are worth the money	24%	13%	21%	23%	19%
Plan is affordable	51%	50%	13%	34%	65%
Have no choice but to pay	0%	0%	2%	0%	1%
Other	0%	0%	0%	0%	0%
Don't know/can't say	5%	20%	10%	8%	4%
TOTAL	100%	100%	100%	100%	100%
No of respondents	148	107	86	131	184

Q28a. VALUE FOR MONEY OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	2%	2%	2%	2%	9%
Fairly poor value for money	15%	11%	11%	11%	7%
Neither poor nor good value for money	32%	29%	32%	32%	26%
Fairly good value for money	36%	38%	30%	35%	33%
Very good value for money	13%	20%	16%	18%	18%
Don't know/can't say	1%	*%	9%	2%	6%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Ensure a reliable and continuous sewerage service for the removal and treatment of sewage

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	1%	2%	2%	2%	6%
Fairly poor value for money	14%	11%	7%	11%	12%
Neither poor nor good value for money	26%	26%	38%	31%	15%
Fairly good value for money	40%	36%	31%	34%	39%
Very good value for money	16%	24%	17%	21%	24%
Don't know/can't say	2%	1%	5%	1%	5%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Avoid risk of homes being flooded with sewage

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	2%	2%	2%	2%	5%
Fairly poor value for money	15%	9%	7%	12%	11%
Neither poor nor good value for money	31%	29%	43%	30%	19%
Fairly good value for money	35%	39%	28%	34%	38%
Very good value for money	15%	21%	16%	22%	23%
Don't know/can't say	2%	*%	6%	1%	4%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Avoid risk of properties being flooded with sewage outside the home

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	1%	1%	1%	2%	6%
Fairly poor value for money	15%	11%	9%	11%	9%
Neither poor nor good value for money	31%	26%	37%	30%	22%
Fairly good value for money	36%	40%	29%	34%	34%
Very good value for money	14%	22%	19%	22%	23%
Don't know/can't say	2%	*%	6%	1%	6%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	1%	1%	1%	2%	7%
Fairly poor value for money	16%	13%	7%	12%	11%
Neither poor nor good value for money	30%	30%	37%	30%	25%
Fairly good value for money	38%	35%	31%	34%	34%
Very good value for money	13%	19%	16%	20%	18%
Don't know/can't say	2%	1%	7%	1%	5%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	1%	2%	2%	2%	4%
Fairly poor value for money	15%	9%	7%	12%	11%
Neither poor nor good value for money	30%	31%	37%	30%	18%
Fairly good value for money	38%	34%	31%	33%	38%
Very good value for money	15%	23%	15%	20%	23%
Don't know/can't say	1%	*%	7%	2%	6%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.43	3.62	3.50	3.58	3.46
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.57	3.69	3.57	3.62	3.67
Avoid risk of homes being flooded with sewage	3.48	3.69	3.53	3.63	3.64
Avoid risk of properties being flooded with sewage outside the home	3.47	3.70	3.58	3.64	3.62
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.48	3.59	3.57	3.58	3.49
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.51	3.67	3.56	3.59	3.68
No of respondents	302	253	254	254	293

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Very poor value for money	12%	22%	5%	8%	7%
Fairly poor value for money	28%	28%	9%	18%	13%
Neither poor nor good value for money	31%	22%	52%	33%	18%
Fairly good value for money	25%	20%	26%	32%	34%
Very good value for money	4%	8%	4%	9%	23%
Don't know/can't say	0%	*%	5%	0%	5%
TOTAL	100%	100%	100%	100%	100%
No of respondents	302	253	254	254	293

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Southern Water	Folkestone & Dover Water	Portsmouth Water	South East Water	Bournemouth & West Hampshire Water
Total sewerage bill by 2014-15	2.80	2.65	3.15	3.16	3.56
No of respondents	302	253	254	254	293

1. Key Findings

Sutton & East Surrey Water is a water company billing 250,600 properties for water services. Sewerage services for Sutton & East Surrey Water are provided by Thames Water.

Uninformed Views of Current and Future Services

86% of customers stated that they were **satisfied** with the services provided by Sutton & East Surrey Water, whereas 4% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (41%) and that there were no problems with the service (37%). The main reasons that customers were dissatisfied were that prices are always increasing (33%), it was too expensive already (22%) and that the service was poor/unreliable (22%).

61% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (42%), the service was worth the money (34%) and that they valued the service (22%). 17% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was not worth the money (47%) and that it was too expensive already (35%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Sutton & East Surrey Water and Thames Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 53% felt that the overall company plan was **acceptable**, 36% felt that it was **unacceptable**, and 12% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

65% of customers stated that the current water service was **good value for money**, 65% stated the current sewerage service (provided by Thames Water) was good value for money, and 63% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the service was worth the money (41%), the bill was affordable (39%) and they valued the service (17%).

10% of customers stated that the current water service was **poor value for money**, 9% stated the current sewerage service was poor value for money, and 10% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was not worth the money (60%) and it was too expensive already (20%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.85 for **water** services, 3.93 for **sewerage** services, and 3.76 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Sutton & East Surrey Water's water and Thames Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

55% of customers felt that Sutton & East Surrey Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reason being that the plan is affordable (71%).

35% of customers felt that Sutton & East Surrey Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (49%) and that the improvements are not worth the money (18%).

55% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (69%) and the improvements are worth the money (19%).

35% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (44%), the improvements are not worth the money (28%) and that they don't value the improvements (16%).

55% of customers felt that Sutton & East Surrey Water's and Thames Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reason being that the plan is affordable (70%).

35% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (48%) and that the improvements are not worth the money (29%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.43 for Sutton & East Surrey Water's **water** services, 3.40 for Thames Water's **sewerage** services, and 3.35 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 52% (water service), 52% (sewerage) and 52% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 27% (water service), 27% (sewerage service) and 29% (service overall).

Timing

60% of Sutton & East Surrey Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year, whereas 29% would like bills to show one big change in the first year, then stay the same for the following four years (29%).

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban when there is a 1 in 10 year drought or worse
	Ensure the safety of tap water - drinking water quality	99.99% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 415 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	40 properties at risk of low water pressure at the tap. Supplies to 17 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.9% of billing enquiries answered within 5 days and 99.7% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.7% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £155
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	2,630 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	3,673 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £111
	CURRENT AVERAGE TOTAL BILL = £266	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	5%	0%	7%	3%	6%	6%	1%	7%	1%	7%	0%	4%	5%	3%	5%	9%	0%	6%	0%	5%
Fairly poor value for money	5%	4%	5%	6%	0%	7%	7%	7%	6%	4%	7%	8%	5%	6%	7%	6%	0%	4%	0%	5%
Neither poor nor good value for money	12%	22%	9%	14%	10%	10%	18%	12%	14%	11%	7%	12%	13%	13%	15%	6%	7%	14%	8%	12%
Fairly good value for money	41%	43%	42%	39%	44%	42%	34%	28%	48%	42%	29%	40%	42%	33%	47%	51%	46%	30%	33%	41%
Very good value for money	24%	13%	25%	24%	29%	19%	24%	30%	20%	23%	36%	24%	22%	30%	19%	23%	32%	18%	42%	23%
Don't know/can't say	14%	17%	12%	14%	10%	15%	15%	17%	12%	13%	21%	12%	13%	14%	7%	6%	14%	28%	17%	13%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	250	23	130	93	68	110	67	60	86	104	14	25	192	63	74	35	28	50	12	238

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.85	3.79	3.84	3.85	4.02	3.71	3.84	3.82	3.89	3.82	4.18	3.82	3.82	3.94	3.72	3.79	4.29	3.69	4.40	3.82
No of respondents	250	23	130	93	68	110	67	60	86	104	14	25	192	63	74	35	28	50	12	238



3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015	
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£26	
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban when there is a 1 in 10 year drought or worse	Maintain current service	£14	
	99.99% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£2	
	Approximately 415 customer complaints to water company about the appearance, taste or smell of tap water each year	10% reduction in complaints about the appearance of tap water	<50p	
	40 properties at risk of low water pressure at the tap. Supplies to 17 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions	<50p	
	99.9% of billing enquiries answered within 5 days and 99.7% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.7% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0	
	Water supplies could occasionally be disrupted e.g. by extreme events	5 assets better protected from severe weather safeguarding service for 210,000 people	<50p	
	Fish and wildlife at 0 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Maintain current service	£0	
	WATER BILL - FROM £153 IN 2010 TO £193 IN 2014/5			£40
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	In addition to maintaining current service, reduce odour emissions at 8 sites	-£1	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£5	
	2,630 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 1,411 properties at risk of internal flooding from sewers at least once in ten years	£3	
	3,673 areas at risk of external flooding from sewers at least once in ten years	4,296 areas at risk of external flooding from sewers at least once in ten years	<50p	
	Sewerage system could occasionally be disrupted e.g. by extreme events	28 sites better protected from severe weather (flooding) safeguarding service for 3 million people	<50p	
	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 320km of river maintained or improved to better support fish and 120km to better support other wildlife. 1 lake restored and protected to support wildlife. Completion of the Lee Tunnel to halve sewage overflows to the Thames Tedeway.	£13	
	SEWERAGE BILL - FROM £113 IN 2010 TO £134 IN 2014/5			£22
	TOTAL COMBINED BILL - FROM £266 IN 2010 TO £327 BY 2014/5			£62

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	1%	15%	9%	21%	41%	13%	250
Ensure a reliable and continuous water supply	2%	14%	9%	30%	31%	13%	250
Ensure the safety of tap water – drinking water quality	4%	12%	10%	29%	33%	12%	250
Manage the appearance, taste and smell of tap water	4%	12%	9%	36%	26%	12%	250
Manage the pressure of water in your taps and the number of unplanned interruptions	6%	11%	11%	30%	30%	12%	250
Handle customers' accounts, queries, complaints and customers with special needs	6%	8%	11%	32%	29%	13%	250
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	12%	18%	34%	20%	12%	250
Manage the amount of water taken from the environment to supply customers	3%	11%	9%	32%	32%	12%	250
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	12%	14%	37%	20%	12%	250
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3%	11%	8%	35%	30%	13%	250
Avoid risk of homes being flooded with sewage	3%	10%	10%	32%	32%	13%	250
Avoid risk of properties being flooded with sewage outside the home	4%	9%	13%	32%	29%	12%	250
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	5%	11%	12%	40%	20%	12%	250
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	10%	10%	35%	33%	11%	250
TOTAL	4%	11%	11%	33%	29%	12%	250

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.98	4.15	4.03	3.88	4.22	3.85	3.86	3.86	4.01	4.01	3.92	4.45	3.93	4.00	3.87	3.79	4.29	4.11	4.60	3.95
Ensure a reliable and continuous water supply	3.84	3.75	3.92	3.75	4.07	3.74	3.72	3.75	3.86	3.88	3.83	4.36	3.80	3.78	3.80	3.67	4.13	3.97	4.40	3.81
Ensure the safety of tap water – drinking water quality	3.87	4.10	3.86	3.83	3.98	3.79	3.81	3.75	3.84	3.96	3.83	4.30	3.85	3.93	3.69	3.70	4.17	4.09	4.64	3.83
Manage the appearance, taste and smell of tap water	3.78	4.05	3.83	3.65	3.93	3.74	3.60	3.63	3.79	3.85	3.75	4.13	3.76	3.71	3.68	3.58	4.17	4.00	4.55	3.74
Manage the pressure of water in your taps and the number of unplanned interruptions	3.78	3.95	3.82	3.69	3.90	3.74	3.64	3.67	3.84	3.79	3.92	4.13	3.76	3.79	3.62	3.58	4.21	4.00	4.64	3.74
Handle customers' accounts, queries, complaints and customers with special needs	3.79	4.10	3.84	3.67	3.93	3.77	3.62	3.71	3.72	3.89	3.75	4.26	3.77	3.80	3.63	3.48	4.33	4.03	4.36	3.76
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.60	3.75	3.68	3.46	3.84	3.56	3.41	3.35	3.59	3.74	3.67	3.96	3.57	3.54	3.46	3.48	4.08	3.76	4.09	3.58
Manage the amount of water taken from the environment to supply customers	3.92	4.00	4.00	3.81	4.11	3.84	3.81	3.80	3.92	3.99	3.83	4.39	3.89	3.93	3.83	3.76	4.29	4.00	4.36	3.90
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.61	3.70	3.65	3.55	3.72	3.55	3.57	3.53	3.62	3.65	3.67	4.13	3.59	3.57	3.53	3.42	4.08	3.68	4.09	3.58
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.90	3.85	3.91	3.93	4.03	3.90	3.74	3.88	3.96	3.87	3.92	4.23	3.90	3.95	3.79	3.79	4.25	3.94	4.64	3.86
Avoid risk of homes being flooded with sewage	3.94	4.10	3.97	3.88	4.05	3.94	3.81	3.88	3.91	4.00	3.75	4.26	3.95	3.98	3.86	3.91	4.30	3.83	4.64	3.90
Avoid risk of properties being flooded with sewage outside the home	3.83	3.90	3.90	3.74	3.98	3.84	3.60	3.75	3.87	3.85	3.67	4.17	3.84	3.77	3.86	3.67	4.17	3.81	4.45	3.80
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.67	3.90	3.72	3.56	3.87	3.65	3.43	3.52	3.64	3.77	3.58	4.09	3.64	3.60	3.56	3.45	4.13	3.86	4.17	3.64
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.98	3.90	4.03	3.95	4.18	3.99	3.76	3.83	4.00	4.05	3.92	4.43	3.96	3.91	3.96	3.94	4.29	3.97	4.36	3.96
TOTAL	3.82	3.94	3.87	3.74	3.99	3.78	3.67	3.71	3.83	3.88	3.79	4.24	3.80	3.80	3.72	3.66	4.21	3.93	4.43	3.79
No of respondents	250	20	115	80	59	95	58	51	76	90	12	22	167	54	70	33	24	36	10	207

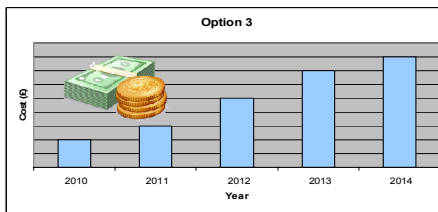
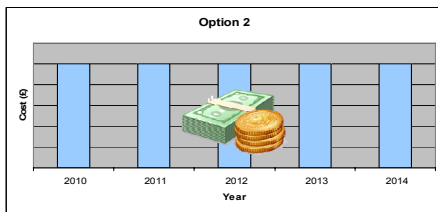
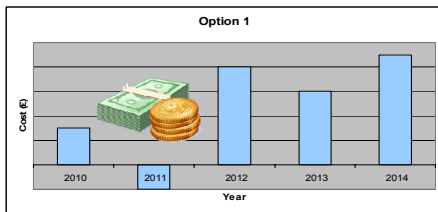
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	5%	4%	8%	1%	6%	5%	3%	3%	3%	7%	0%	8%	5%	2%	3%	9%	14%	4%	0%	5%
Ensure a reliable and continuous water supply	58%	70%	58%	55%	69%	58%	49%	47%	64%	61%	64%	64%	59%	48%	49%	57%	86%	72%	42%	59%
Ensure the safety of tap water – drinking water quality	64%	74%	65%	61%	74%	60%	63%	63%	65%	64%	57%	72%	66%	65%	54%	57%	79%	76%	50%	65%
Manage the appearance, taste and smell of tap water	32%	43%	32%	28%	34%	29%	36%	37%	26%	34%	29%	28%	31%	32%	36%	31%	21%	30%	33%	32%
Manage the pressure of water in your taps and the number of unplanned interruptions	26%	30%	24%	28%	21%	29%	25%	23%	23%	29%	36%	16%	24%	25%	41%	31%	11%	8%	42%	25%
Handle customers' accounts, queries, complaints and customers with special needs	43%	30%	45%	43%	32%	45%	49%	37%	47%	43%	21%	52%	43%	44%	47%	43%	32%	40%	42%	43%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	14%	9%	17%	13%	13%	16%	12%	10%	16%	15%	29%	4%	15%	11%	23%	29%	4%	2%	8%	15%
Manage the amount of water taken from the environment to supply customers	9%	4%	5%	17%	7%	7%	15%	15%	10%	5%	14%	4%	9%	16%	14%	3%	0%	4%	25%	8%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	9%	7%	5%	4%	5%	10%	5%	6%	8%	14%	0%	6%	8%	5%	3%	7%	8%	0%	7%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	9%	0%	5%	17%	10%	10%	6%	10%	14%	4%	21%	8%	9%	11%	1%	6%	7%	20%	0%	9%
Avoid risk of homes being flooded with sewage	4%	9%	4%	4%	3%	4%	7%	10%	3%	2%	7%	4%	5%	8%	3%	0%	14%	0%	8%	4%
Avoid risk of properties being flooded with sewage outside the home	2%	4%	3%	1%	4%	2%	1%	3%	0%	4%	0%	4%	3%	2%	1%	3%	11%	0%	0%	3%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	0%	2%	2%	4%	0%	1%	2%	1%	2%	0%	0%	2%	3%	1%	3%	0%	0%	0%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	0%	2%	3%	3%	2%	3%	3%	1%	3%	0%	0%	3%	3%	1%	6%	4%	0%	0%	3%
No of respondents	250	23	130	93	68	110	67	60	86	104	14	25	192	63	74	35	28	50	12	238

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	11%	0%	12%	13%	15%	11%	9%	18%	6%	12%	7%	0%	13%	13%	15%	14%	11%	2%	0%	12%
Bills show one big change in first year, then stay the same for the following four years	29%	22%	29%	32%	26%	28%	34%	30%	29%	29%	43%	24%	29%	29%	43%	37%	11%	14%	50%	28%
Bills change steadily every year, so that customers do not see big changes from year to year	60%	78%	58%	55%	59%	61%	57%	52%	65%	60%	50%	76%	58%	59%	42%	49%	79%	84%	50%	60%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	250	23	130	93	68	110	67	60	86	104	14	25	192	63	74	35	28	50	12	238



3.6 Other Company Information

GENDER

	Total
Male	49%
Female	51%
No of respondents	250

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	40%
Jointly responsible for household finances along with spouse/partner	50%
Contributor to shared household expenses (e.g. house/flatmate, parents)	4%
Payment through private rent	3%
Payment through Council rent/social housing	4%
Other	0%
Refused	0%
No of respondents	250

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	42%
Employed Part-time (9-29 hours)	8%
Retired	34%
Not working and not looking for work	8%
Student	1%
Not working and looking for work	6%
Other	0%
Refused	2%
No of respondents	250

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	*0%
B	*0%
C	4%
D	21%
E	16%
F	5%
G	3%
H	1%
Don't know	50%
No of respondents	250

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	0%
Don't increase / should reduce charges	1%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	0%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	*0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	1%
None	86%
Don't know	11%
Refused	*0%
No of respondents	250

**Please note: multiple responses were allowed in this question



1. Key Findings

Tendring Hundred Water is a water company billing 66,400 properties for water services. Sewerage services for Tendring Hundred Water are provided by Anglian Water.

Uninformed Views of Current and Future Services

92% of customers stated that they were **satisfied** with the services provided by Tendring Hundred Water, whereas 5% of customers indicated that they were dissatisfied with the service. The main reason customers were satisfied was that there was a good/reliable service with no interruptions (89%). The main reasons that customers were dissatisfied were that the water was poor/unreliable (36%), prices are always increasing (27%) and that it was too expensive already (27%).

64% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that they valued the service (47%) and the bill was affordable (43%). 20% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (92%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Tendring Hundred Water and Anglian Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 65% felt that the overall company plan was **acceptable**, 28% felt that it was **unacceptable**, and 8% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

59% of customers stated that the current water service was **good value for money**, 59% stated the current sewerage service (provided by Anglian Water) was good value for money, and 57% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that they valued the service (46%) and the bill was affordable (44%).

18% of customers stated that the current water service was **poor value for money**, 15% stated the current sewerage service was poor value for money, and 17% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (83%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.42 for **water** services, 3.51 for **sewerage** services, and 3.42 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Tendring Hundred Water's water and Anglian Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

64% of customers felt that Tendring Hundred Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (68%) and they valued the improvements (23%).

30% of customers felt that Tendring Hundred Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (63%) and they opposed paying more to companies who make large profits (11%).

63% of customers felt that Anglian Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (69%) and they valued the improvements (22%).

29% of customers felt that Anglian Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (64%), they opposed paying more to companies who make large profits (11%) and that the improvements are not worth the money (10%).

62% of customers felt that Tendring Hundred Water's and Anglian Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (67%) and they valued the improvements (23%).

30% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reason being that it was too expensive already (65%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.22 for Tendring Hundred's **water** services, 3.24 for Anglian Water's **sewerage** services, and 3.28 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 42% (water service), 44% (sewerage) and 47% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 22% (water service), 23% (sewerage service) and 22% (service overall).

Timing

98% of Tendring Hundred Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.



3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - no restrictions in usage
	Ensure the safety of tap water - drinking water quality	99.92% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 233 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	No properties at risk of low water pressure at the tap. Supplies to 3 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 2.8% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at no sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £161
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	422 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	389 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £197
	CURRENT AVERAGE TOTAL BILL = £358	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	3%	0%	4%	3%	5%	2%	4%	3%	3%	3%	3%	2%	5%	0%	6%	0%	4%	4%	5%	3%
Fairly poor value for money	15%	18%	15%	16%	5%	14%	20%	15%	13%	20%	18%	15%	14%	18%	8%	20%	11%	20%	10%	17%
Neither poor nor good value for money	20%	9%	20%	19%	14%	17%	24%	20%	22%	15%	21%	15%	24%	22%	17%	10%	21%	21%	21%	19%
Fairly good value for money	55%	73%	54%	54%	65%	63%	42%	58%	51%	58%	51%	59%	52%	55%	65%	60%	57%	44%	56%	54%
Very good value for money	4%	0%	5%	3%	8%	3%	3%	0%	7%	1%	4%	5%	3%	5%	0%	5%	6%	3%	5%	3%
Don't know/can't say	4%	0%	3%	5%	3%	2%	6%	3%	4%	3%	4%	5%	3%	0%	4%	5%	0%	8%	3%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	250	11	108	129	37	115	98	59	119	71	77	87	79	60	52	20	47	71	61	189

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.42	3.55	3.42	3.41	3.67	3.51	3.21	3.37	3.47	3.36	3.36	3.51	3.34	3.47	3.48	3.53	3.51	3.23	3.47	3.40
No of respondents	250	11	108	129	37	115	98	59	119	71	77	87	79	60	52	20	47	71	61	189



Q17. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SEWERAGE SERVICE IN TERMS OF VALUE FOR MONEY?

Table with 16 columns: Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban). Rows include: Very poor value for money (3%), Fairly poor value for money (12%), Neither poor nor good value for money (21%), Fairly good value for money (52%), Very good value for money (7%), Don't know/can't say (5%), TOTAL (100%), No of respondents (250).

(1 represents very poor value for money and 5 represents very good value for money)

Summary table for Q17 with columns: Total, Age, SEG, Household size, Water meter?, Household Income, Location. Rows: Mean value for money score (3.51), No of respondents (250).

Q18. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SERVICE OVERALL IN TERMS OF VALUE FOR MONEY?

Table with 16 columns: Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban). Rows include: Very poor value for money (3%), Fairly poor value for money (14%), Neither poor nor good value for money (22%), Fairly good value for money (54%), Very good value for money (3%), Don't know/can't say (4%), TOTAL (100%), No of respondents (250).

(1 represents very poor value for money and 5 represents very good value for money)

Summary table for Q18 with columns: Total, Age, SEG, Household size, Water meter?, Household Income, Location. Rows: Mean value for money score (3.42), No of respondents (250).

Q18a. WHAT IS THE MAIN REASON THAT YOU FEEL YOUR CURRENT OVERALL SERVICE IS POOR VALUE FOR MONEY?

Table with 16 columns: Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban). Rows include: I don't value the service (2%), Not worth the money (7%), Too expensive already (83%), Cannot afford it (0%), Oppose paying so much for a natural resource (2%), Oppose paying so much to companies who make large profits (5%), Oppose paying more to water companies when so much water is lost in leakage (0%), I don't have any problems / complaints about the service (0%), I don't have any choice / its a necessity (0%), Other (0%), Don't know/can't say (0%), TOTAL (100%), No of respondents (42).

Q18b. WHAT IS THE MAIN REASON THAT YOU FEEL YOUR CURRENT SERVICE OFFERS GOOD VALUE FOR MONEY?

Table with 16 columns: Total, Age (18-29, 30-59, 60+), SEG (AB, C, DE), Household size (1, 2, 3+), Water meter? (Opted, Other, No), Household Income (Gross, P.A.) (<10K, 10-20K, 20-30K, 30K+, DK), Location (Rural, Urban). Rows include: I value the service (46%), Service is worth the money (10%), Bill is affordable (44%), I don't have any problems / complaints about the service (0%), I don't have any choice / its a necessity (0%), It's less than my bill (0%), Other (0%), Don't know/can't say (0%), TOTAL (100%), No of respondents (143).



3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015	
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£21	
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - no restrictions in usage	Maintain current service	£3	
	99.92% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£0	
	Approximately 233 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0	
	No properties at risk of low water pressure at the tap. Supplies to 3 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain at 0 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 0	£0	
	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 2.8% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively. Introducing automatic meter reading for 25,000 customers	<50p	
	Water supplies could occasionally be disrupted e.g. by extreme events	Maintain current service	£0	
	Fish and wildlife at no sites suffer from (or are at risk of) low water levels caused by abstraction of water	Maintain current service	£0	
	WATER BILL - FROM £162 IN 2010 TO £186 IN 2014/5			£24
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service for these services and reduce smells from sewage treatment works	£3	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£3	
	422 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 149 properties at risk of internal flooding from sewers at least once in ten years	<50p	
	389 areas at risk of external flooding from sewers at least once in ten years	Reduce by 133 the areas at risk of external flooding from sewers at least once in ten years	<50p	
	Sewerage system could occasionally be disrupted e.g. by extreme events	367 assets better protected from severe weather safeguarding service for 2.8 million people	<50p	
	570km of river of poor/bad quality, 4,030km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 240km of river can better support fish and 330km can better support other wildlife: plus 8 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£3	
	SEWERAGE BILL - FROM £200 IN 2010 TO £209 IN 2014/5			£9
	TOTAL COMBINED BILL - FROM £362 IN 2010 TO £395 BY 2014/5			£33



Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE SERVICES IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	22%	29%	19%	24%	27%	20%	21%	33%	20%	16%	20%	27%	19%	30%	19%	20%	18%	20%	24%	21%
Improvements are worth the money	4%	0%	4%	5%	12%	4%	2%	3%	6%	2%	7%	4%	4%	5%	6%	7%	6%	0%	0%	6%
Plan is affordable	69%	71%	76%	62%	58%	76%	64%	55%	67%	82%	60%	65%	77%	57%	72%	73%	76%	69%	71%	68%
Have no choice but to pay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	5%	0%	1%	9%	4%	0%	13%	9%	6%	0%	13%	4%	0%	8%	3%	0%	0%	11%	6%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	157	7	70	78	26	75	56	33	79	45	45	55	53	37	36	15	34	35	34	123

Q25. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN AS A WHOLE AND THE IMPACT ON YOUR OVERALL BILL?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Completely unacceptable	2%	0%	3%	2%	5%	1%	3%	3%	3%	1%	3%	2%	3%	0%	6%	0%	2%	3%	3%	2%
Unacceptable	28%	36%	24%	32%	14%	31%	31%	34%	25%	28%	32%	26%	25%	37%	15%	20%	21%	38%	31%	28%
Acceptable	60%	64%	63%	57%	70%	63%	54%	53%	63%	63%	58%	60%	63%	58%	67%	75%	70%	46%	56%	62%
Very acceptable	2%	0%	4%	2%	5%	3%	1%	3%	3%	1%	0%	5%	3%	0%	2%	0%	4%	4%	3%	2%
Don't know/can't say	6%	0%	6%	7%	5%	3%	11%	7%	7%	6%	6%	7%	6%	5%	10%	5%	2%	8%	7%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	250	11	108	129	37	115	98	59	119	71	77	87	79	60	52	20	47	71	61	189

Q26. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS UNACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I don't value the improvements	5%	25%	3%	5%	14%	5%	3%	5%	0%	10%	7%	4%	5%	5%	0%	0%	18%	3%	14%	2%
Improvements not worth the money	9%	0%	7%	11%	29%	8%	6%	9%	12%	5%	11%	8%	9%	9%	27%	0%	18%	0%	14%	7%
Too expensive already	65%	50%	69%	64%	43%	57%	79%	59%	70%	67%	56%	68%	77%	64%	45%	75%	45%	79%	52%	70%
Cannot afford it	4%	0%	3%	5%	0%	8%	0%	14%	0%	0%	11%	0%	0%	5%	9%	0%	0%	3%	0%	5%
Oppose paying more for a natural resource	5%	25%	7%	2%	0%	5%	6%	5%	6%	5%	4%	4%	9%	9%	0%	25%	0%	3%	5%	5%
Oppose paying more to companies who make large profits	9%	0%	7%	11%	14%	14%	3%	5%	9%	14%	7%	12%	0%	9%	9%	0%	18%	7%	14%	7%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	3%	0%	3%	2%	0%	3%	3%	5%	3%	0%	4%	4%	0%	0%	9%	0%	0%	3%	0%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	77	4	29	44	7	37	33	22	33	21	27	25	22	22	11	4	11	29	21	56

Q27. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN AS A WHOLE IS ACCEPTABLE?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	23%	29%	21%	25%	32%	20%	22%	33%	22%	17%	22%	29%	19%	31%	19%	20%	20%	22%	28%	21%
Improvements are worth the money	5%	0%	6%	5%	11%	5%	2%	3%	8%	2%	7%	4%	4%	6%	8%	7%	6%	0%	0%	7%
Plan is affordable	67%	71%	72%	61%	54%	75%	63%	55%	64%	80%	58%	64%	77%	54%	69%	73%	74%	67%	67%	67%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know/can't say	5%	0%	1%	9%	4%	0%	13%	9%	6%	0%	13%	4%	0%	9%	3%	0%	0%	11%	6%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	157	7	72	76	28	75	54	33	78	46	45	56	52	35	36	15	35	36	36	121



Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	1%	11%	26%	34%	28%	*%	250
Ensure a reliable and continuous water supply	0%	12%	25%	34%	28%	0%	250
Ensure the safety of tap water – drinking water quality	*%	13%	22%	36%	28%	0%	250
Manage the appearance, taste and smell of tap water	0%	12%	22%	36%	28%	*%	250
Manage the pressure of water in your taps and the number of unplanned interruptions	1%	13%	21%	40%	25%	1%	250
Handle customers’ accounts, queries, complaints and customers with special needs	*%	13%	21%	41%	24%	*%	250
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	1%	13%	26%	36%	22%	1%	250
Manage the amount of water taken from the environment to supply customers	0%	13%	22%	40%	26%	0%	250
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	12%	27%	34%	24%	2%	250
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	*%	12%	20%	41%	25%	1%	250
Avoid risk of homes being flooded with sewage	*%	12%	23%	41%	24%	0%	250
Avoid risk of properties being flooded with sewage outside the home	*%	12%	24%	40%	23%	1%	250
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	*%	14%	27%	35%	23%	1%	250
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	*%	12%	23%	40%	24%	1%	250
TOTAL	0%	13%	24%	38%	25%	1%	250

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.78	3.36	3.65	3.91	3.95	3.57	3.97	3.69	3.97	3.58	3.78	3.86	3.71	3.61	3.87	3.55	3.45	4.15	3.67	3.82
Ensure a reliable and continuous water supply	3.78	3.36	3.70	3.87	3.97	3.54	4.00	3.68	3.93	3.65	3.81	3.82	3.76	3.62	3.88	3.55	3.53	4.08	3.66	3.83
Ensure the safety of tap water – drinking water quality	3.80	3.55	3.73	3.85	3.92	3.56	4.03	3.61	3.97	3.68	3.78	3.90	3.73	3.67	3.83	3.65	3.51	4.11	3.61	3.86
Manage the appearance, taste and smell of tap water	3.81	3.64	3.75	3.87	3.95	3.60	4.01	3.62	3.99	3.69	3.79	3.93	3.73	3.71	3.85	3.65	3.57	4.07	3.59	3.88
Manage the pressure of water in your taps and the number of unplanned interruptions	3.76	3.45	3.68	3.84	3.86	3.52	4.01	3.60	3.92	3.65	3.78	3.85	3.68	3.71	3.73	3.55	3.53	4.04	3.55	3.83
Handle customers’ accounts, queries, complaints and customers with special needs	3.75	3.36	3.73	3.79	3.86	3.48	4.03	3.56	3.87	3.73	3.73	3.85	3.71	3.68	3.61	3.70	3.57	4.04	3.50	3.83
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.68	3.45	3.64	3.72	3.86	3.40	3.93	3.43	3.81	3.67	3.65	3.75	3.64	3.64	3.57	3.60	3.62	3.84	3.42	3.76
Manage the amount of water taken from the environment to supply customers	3.78	3.45	3.71	3.86	3.86	3.54	4.03	3.54	3.92	3.76	3.78	3.89	3.70	3.70	3.65	3.85	3.60	4.04	3.54	3.86
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.67	3.40	3.61	3.74	3.81	3.40	3.94	3.44	3.81	3.66	3.66	3.80	3.58	3.59	3.60	3.60	3.50	3.92	3.43	3.74
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.78	3.50	3.76	3.82	3.86	3.57	4.00	3.51	3.92	3.80	3.73	3.87	3.77	3.63	3.75	3.80	3.67	4.00	3.49	3.87
Avoid risk of homes being flooded with sewage	3.75	3.45	3.69	3.81	3.84	3.50	4.00	3.51	3.89	3.73	3.71	3.83	3.72	3.63	3.69	3.65	3.62	4.00	3.49	3.83
Avoid risk of properties being flooded with sewage outside the home	3.73	3.50	3.67	3.80	3.84	3.46	4.02	3.54	3.86	3.71	3.66	3.84	3.72	3.63	3.69	3.65	3.57	3.99	3.49	3.81
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.67	3.30	3.61	3.74	3.78	3.42	3.93	3.49	3.80	3.64	3.64	3.80	3.60	3.63	3.63	3.50	3.52	3.89	3.47	3.74
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.75	3.50	3.68	3.82	3.86	3.52	3.98	3.54	3.89	3.71	3.71	3.84	3.71	3.58	3.71	3.60	3.65	4.03	3.47	3.84
TOTAL	3.75	3.45	3.69	3.82	3.87	3.51	3.99	3.55	3.90	3.69	3.73	3.84	3.70	3.65	3.72	3.64	3.57	4.01	3.53	3.82
No of respondents	250	11	108	128	37	115	97	58	119	71	76	87	79	59	52	20	47	71	61	188



Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

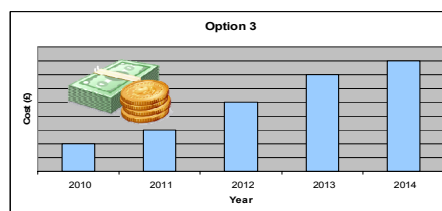
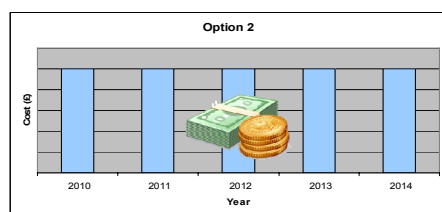
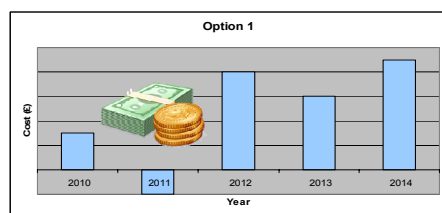
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	20%	9%	19%	22%	19%	18%	21%	12%	24%	20%	19%	22%	18%	12%	15%	5%	15%	37%	20%	20%
Ensure a reliable and continuous water supply	76%	100%	76%	75%	73%	74%	80%	73%	75%	82%	78%	77%	72%	88%	75%	85%	79%	62%	69%	78%
Ensure the safety of tap water – drinking water quality	54%	64%	52%	55%	51%	49%	60%	53%	53%	55%	57%	46%	59%	53%	58%	45%	57%	51%	51%	54%
Manage the appearance, taste and smell of tap water	21%	18%	19%	24%	22%	16%	28%	17%	25%	17%	19%	18%	28%	15%	21%	20%	15%	31%	21%	21%
Manage the pressure of water in your taps and the number of unplanned interruptions	4%	0%	5%	4%	3%	5%	3%	0%	6%	4%	3%	3%	6%	2%	6%	0%	4%	6%	3%	4%
Handle customers' accounts, queries, complaints and customers with special needs	1%	0%	0%	2%	0%	1%	2%	5%	0%	0%	3%	0%	1%	3%	0%	0%	0%	1%	0%	2%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3%	0%	2%	4%	3%	3%	2%	3%	4%	0%	3%	3%	3%	2%	4%	5%	0%	4%	2%	3%
Manage the amount of water taken from the environment to supply customers	2%	0%	2%	2%	0%	2%	3%	3%	2%	1%	4%	0%	3%	2%	4%	0%	0%	3%	2%	2%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	1%	0%	0%	2%	0%	2%	1%	2%	2%	0%	1%	1%	1%	0%	2%	0%	0%	3%	2%	1%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	20%	0%	25%	17%	24%	22%	15%	14%	19%	25%	14%	16%	29%	18%	31%	30%	26%	6%	13%	22%
Avoid risk of homes being flooded with sewage	12%	27%	11%	12%	14%	16%	7%	17%	8%	14%	16%	10%	9%	12%	15%	10%	17%	7%	21%	9%
Avoid risk of properties being flooded with sewage outside the home	6%	9%	6%	5%	0%	9%	4%	2%	8%	4%	5%	7%	5%	8%	4%	10%	4%	4%	3%	6%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	0%	1%	2%	0%	3%	2%	3%	3%	0%	3%	1%	3%	2%	2%	0%	0%	4%	3%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	*%	0%	1%	0%	3%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	1%	2%	0%
No of respondents	250	11	108	129	37	115	98	59	119	71	77	87	79	60	52	20	47	71	61	189

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	*%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	1%	0%	1%
Bills show one big change in first year, then stay the same for the following four years	2%	0%	2%	2%	5%	1%	2%	0%	3%	1%	4%	0%	1%	0%	0%	0%	4%	4%	5%	1%
Bills change steadily every year, so that customers do not see big changes from year to year	98%	100%	97%	98%	95%	99%	97%	100%	97%	97%	96%	100%	97%	100%	100%	100%	96%	94%	95%	98%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	250	11	108	129	37	115	98	59	119	71	77	87	79	60	52	20	47	71	61	189





3.6 Other Company Information

GENDER

	Total
Male	46%
Female	54%
No of respondents	250

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	75%
Jointly responsible for household finances along with spouse/partner	23%
Contributor to shared household expenses (e.g. house/flatmate, parents)	1%
Payment through private rent	*%
Payment through Council rent/social housing	*%
Other	0%
Refused	0%
No of respondents	250

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	23%
Employed Part-time (9-29 hours)	9%
Retired	50%
Not working and not looking for work	8%
Student	*%
Not working and looking for work	7%
Other	1%
Refused	1%
No of respondents	250

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	10%
B	16%
C	18%
D	17%
E	3%
F	1%
G	*%
H	0%
Don't know	35%
No of respondents	250

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	2%
Don't increase / should reduce charges	1%
Generally receive good level of service / happy with service	1%
Service is reliable	0%
Want a water meter installed	*%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	*%
Solve the water pressure problem	2%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	*%
Improve drainage system / solve problems with blockages	1%
Deal with hard water / lime scale problem	0%
Reduce bad smells	1%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	*%
More frequent meter reading	0%
Improve level of service / customer service / customer information	2%
Reduce the number / there are too many chemicals added to water	*%
Reduce number of leakages / increase repairs to pipes	0%
Other	0%
None	87%
Don't know	0%
Refused	0%
No of respondents	250

**Please note: multiple responses were allowed in this question



1. Key Findings

Thames Water is a water and sewerage company billing 3,231,700 properties for water and 5,029,740 properties for sewerage services.

Uninformed Views of Current and Future Services

93% of customers stated that they were **satisfied** with the services provided by Thames Water, whereas 4% of customers indicated that they were dissatisfied with the service. The main reason customers were satisfied was that there was a good/reliable service with no interruptions (82%). The main reasons that customers were dissatisfied were that it was too expensive already (50%), the services are poor/unreliable (14%). A further 14% also specified that the water specifically is poor/unreliable and 14% stated the sewerage was poor/unreliable.

54% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that they valued the service (55%) and the bill was affordable (38%). 28% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (75%).

Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 45% felt that the overall company plan was **acceptable**, 41% felt that it was **unacceptable**, and 14% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

54% of customers stated that the current water service was **good value for money**, 54% stated the current sewerage service was good value for money, and 53% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that they valued the service (49%) and that the bill was affordable (43%).

20% of customers stated that the current water service was **poor value for money**, 20% stated the current sewerage service was poor value for money, and 20% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (74%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.38 for **water** services, 3.43 for **sewerage** services, and 3.38 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

49% of customers felt that Thames Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (58%) and they valued the improvements (31%).

38% of customers felt that Thames Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (55%) and they cannot afford it (18%).

48% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (57%) and they valued the improvements (33%).

38% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (56%) and that they cannot afford it (18%).

48% of customers felt that Thames Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (57%) and they valued the improvements (32%).

38% of customers felt that Thames Water's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (55%) and that they cannot afford it (18%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.03 for **water** services, 3.03 for **sewerage** services, and 3.02 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 31% (water service), 30% (sewerage) and 31% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 28% (water service), 27% (sewerage service) and 28% (service overall).

Timing

90% of Thames Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.



3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 17 years
	Ensure the safety of tap water - drinking water quality	99.98% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 7,892 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	349 properties at risk of low water pressure at the tap. Supplies to 1,568 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.8% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.1% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 2 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £169
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	2,630 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	3,673 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £111
	CURRENT AVERAGE TOTAL BILL = £280	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	3%	0%	2%	4%	1%	2%	6%	6%	1%	3%	0%	0%	4%	2%	0%	0%	1%	7%	0%	3%
Fairly poor value for money	17%	8%	19%	21%	11%	19%	19%	22%	17%	15%	14%	15%	19%	26%	14%	17%	12%	16%	0%	17%
Neither poor nor good value for money	15%	11%	15%	19%	8%	17%	17%	22%	14%	12%	19%	0%	17%	23%	22%	13%	8%	13%	0%	15%
Fairly good value for money	50%	63%	47%	44%	66%	47%	42%	42%	53%	52%	43%	63%	49%	41%	59%	61%	63%	40%	0%	50%
Very good value for money	4%	6%	4%	1%	12%	2%	0%	0%	4%	5%	5%	8%	3%	0%	0%	0%	12%	2%	0%	4%
Don't know/can't say	12%	11%	13%	11%	1%	14%	16%	9%	11%	13%	19%	15%	9%	9%	5%	9%	3%	22%	0%	12%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%
No of respondents	303	79	124	95	73	124	106	65	83	154	21	40	193	66	37	23	73	104	0	303

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.38	3.77	3.35	3.19	3.78	3.32	3.15	3.08	3.46	3.49	3.47	3.74	3.29	3.13	3.49	3.48	3.75	3.19	0.00	3.38
No of respondents	303	79	124	95	73	124	106	65	83	154	21	40	193	66	37	23	73	104	0	303



3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015	
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£3	
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 17 years	Restore risk of hosepipe ban to no more than once in 20 years	£18	
	99.98% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£1	
	Approximately 7,892 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0	
	349 properties at risk of low water pressure at the tap. Supplies to 1,568 properties affected by unplanned interruptions lasting more than 12 hrs	Maintain at 349 the number of properties at risk of low water pressure. 1,452 properties affected by unplanned interruptions	£0	
	99.8% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.1% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0	
	Water supplies could occasionally be disrupted e.g. by extreme events	16 sites better protected from severe weather (flooding) safeguarding service for 2.75 million people	<50p	
	Fish and wildlife at 2 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 2 sites enabling fish and wildlife to thrive	£2	
WATER BILL - FROM £171 IN 2010 TO £195 IN 2014/5			£24	
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	In addition to maintaining current service, reduce odour emissions at 8 sites	-£1	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£5	
	2,630 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 1,411 properties at risk of internal flooding from sewers at least once in ten years	£3	
	3,673 areas at risk of external flooding from sewers at least once in ten years	4,296 areas at risk of external flooding from sewers at least once in ten years	<50p	
	Sewerage system could occasionally be disrupted e.g. by extreme events	28 sites better protected from severe weather (flooding) safeguarding service for 3 million people	<50p	
	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 320km of river maintained or improved to better support fish and 120km to better support other wildlife. 1 lake restored and protected to support wildlife. Completion of the Lee Tunnel to halve sewage overflows to the Thames Tideway.	£13	
	SEWERAGE BILL - FROM £113 IN 2010 TO £134 IN 2014/5			£22
	TOTAL COMBINED BILL - FROM £283 IN 2010 TO £329 BY 2014/5			£46



Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	0%	18%	22%	27%	25%	8%	303
Ensure a reliable and continuous water supply	1%	18%	22%	26%	25%	7%	303
Ensure the safety of tap water – drinking water quality	0%	19%	21%	28%	25%	7%	303
Manage the appearance, taste and smell of tap water	1%	17%	22%	30%	23%	7%	303
Manage the pressure of water in your taps and the number of unplanned interruptions	1%	16%	24%	30%	22%	7%	303
Handle customers' accounts, queries, complaints and customers with special needs	1%	18%	22%	27%	23%	8%	303
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	19%	23%	27%	21%	7%	303
Manage the amount of water taken from the environment to supply customers	1%	18%	22%	28%	23%	8%	303
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	17%	22%	27%	22%	9%	303
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	1%	18%	22%	25%	24%	9%	303
Avoid risk of homes being flooded with sewage	1%	18%	23%	25%	24%	8%	303
Avoid risk of properties being flooded with sewage outside the home	1%	19%	21%	27%	23%	9%	303
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	17%	21%	28%	22%	9%	303
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	18%	22%	26%	24%	9%	303
TOTAL	1%	18%	22%	27%	23%	8%	303

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.63	3.85	3.57	3.53	3.28	3.78	3.70	3.61	3.62	3.65	3.63	3.53	3.57	3.47	3.36	3.76	3.43	3.96	0.00	3.63
Ensure a reliable and continuous water supply	3.59	3.85	3.55	3.47	3.22	3.75	3.68	3.58	3.58	3.62	3.70	3.48	3.51	3.45	3.28	3.76	3.32	3.97	0.00	3.59
Ensure the safety of tap water – drinking water quality	3.63	3.83	3.58	3.54	3.23	3.77	3.74	3.56	3.59	3.69	3.80	3.50	3.57	3.42	3.36	3.71	3.42	4.00	0.00	3.63
Manage the appearance, taste and smell of tap water	3.62	3.93	3.52	3.52	3.28	3.74	3.73	3.61	3.53	3.69	3.65	3.53	3.56	3.48	3.22	3.76	3.38	4.02	0.00	3.62
Manage the pressure of water in your taps and the number of unplanned interruptions	3.60	3.90	3.50	3.49	3.29	3.72	3.69	3.56	3.58	3.65	3.65	3.53	3.52	3.48	3.22	3.62	3.41	3.97	0.00	3.60
Handle customers' accounts, queries, complaints and customers with special needs	3.57	3.89	3.44	3.49	3.38	3.70	3.57	3.54	3.56	3.60	3.80	3.50	3.48	3.32	3.22	3.76	3.46	3.91	0.00	3.57
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.52	3.79	3.46	3.39	3.26	3.64	3.56	3.53	3.46	3.56	3.75	3.35	3.44	3.34	3.17	3.71	3.33	3.86	0.00	3.52
Manage the amount of water taken from the environment to supply customers	3.58	3.85	3.55	3.43	3.32	3.75	3.56	3.54	3.51	3.65	3.75	3.44	3.51	3.34	3.25	3.81	3.43	3.93	0.00	3.58
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.55	3.84	3.46	3.47	3.32	3.67	3.57	3.58	3.47	3.59	3.75	3.38	3.48	3.36	3.19	3.67	3.40	3.89	0.00	3.55
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.59	3.87	3.47	3.51	3.30	3.75	3.60	3.55	3.62	3.60	3.75	3.41	3.51	3.38	3.22	3.76	3.40	3.96	0.00	3.59
Avoid risk of homes being flooded with sewage	3.58	3.86	3.51	3.46	3.32	3.73	3.59	3.53	3.57	3.62	3.75	3.44	3.52	3.42	3.22	3.76	3.42	3.91	0.00	3.58
Avoid risk of properties being flooded with sewage outside the home	3.57	3.83	3.49	3.48	3.33	3.70	3.59	3.57	3.47	3.64	3.75	3.44	3.50	3.36	3.25	3.71	3.41	3.91	0.00	3.57
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.54	3.77	3.51	3.40	3.29	3.69	3.55	3.52	3.49	3.59	3.75	3.44	3.47	3.33	3.14	3.75	3.40	3.90	0.00	3.54
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.59	3.84	3.54	3.45	3.34	3.76	3.58	3.56	3.55	3.64	3.75	3.44	3.53	3.36	3.23	3.90	3.42	3.95	0.00	3.59
TOTAL	3.58	3.85	3.51	3.47	3.30	3.72	3.62	3.56	3.54	3.63	3.73	3.46	3.51	3.39	3.24	3.75	3.40	3.94	0.00	3.58
No of respondents	303	72	115	88	69	112	98	59	76	143	19	34	180	62	36	21	68	92	0	279



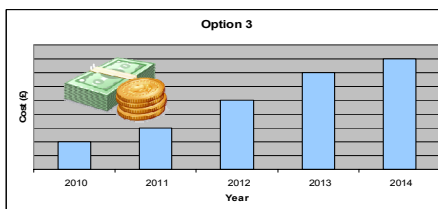
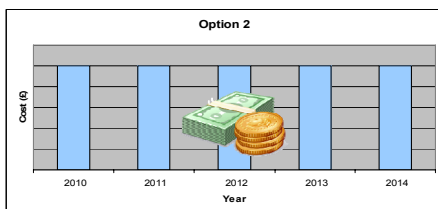
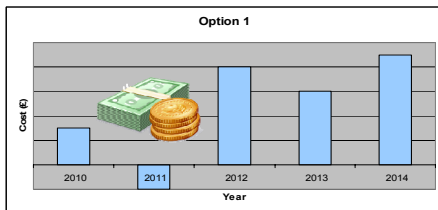
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	15%	16%	15%	14%	15%	15%	16%	9%	18%	16%	19%	13%	14%	9%	11%	9%	19%	19%	0%	15%
Ensure a reliable and continuous water supply	88%	85%	89%	93%	93%	86%	88%	88%	87%	90%	95%	100%	88%	88%	92%	87%	86%	89%	0%	88%
Ensure the safety of tap water – drinking water quality	64%	75%	61%	59%	70%	57%	67%	60%	63%	66%	52%	70%	60%	52%	65%	65%	67%	68%	0%	64%
Manage the appearance, taste and smell of tap water	20%	27%	21%	15%	4%	25%	26%	18%	16%	24%	19%	23%	18%	15%	14%	39%	5%	33%	0%	20%
Manage the pressure of water in your taps and the number of unplanned interruptions	3%	3%	3%	4%	7%	2%	2%	2%	6%	3%	5%	3%	4%	2%	0%	0%	8%	3%	0%	3%
Handle customers' accounts, queries, complaints and customers with special needs	2%	4%	1%	1%	1%	3%	0%	0%	1%	3%	5%	0%	1%	0%	0%	0%	1%	4%	0%	2%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	1%	1%	2%	0%	1%	0%	2%	0%	0%	2%	0%	0%	2%	0%	3%	0%	3%	0%	0%	1%
Manage the amount of water taken from the environment to supply customers	2%	4%	2%	1%	0%	3%	2%	2%	2%	2%	0%	3%	2%	2%	3%	4%	1%	2%	0%	2%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	2%	1%	2%	3%	1%	3%	1%	2%	1%	3%	5%	0%	3%	0%	3%	4%	1%	3%	0%	2%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	29%	32%	30%	25%	42%	27%	21%	23%	34%	29%	29%	48%	24%	21%	30%	35%	38%	25%	0%	29%
Avoid risk of homes being flooded with sewage	5%	1%	7%	5%	14%	2%	2%	3%	5%	6%	14%	3%	5%	2%	8%	4%	14%	0%	0%	5%
Avoid risk of properties being flooded with sewage outside the home	2%	0%	2%	2%	3%	2%	0%	2%	2%	1%	10%	3%	1%	0%	0%	0%	4%	2%	0%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	3%	1%	0%	1%	0%	2%	0%	1%	1%	5%	3%	0%	0%	3%	0%	1%	1%	0%	1%
No of respondents	303	79	124	95	73	124	106	65	83	154	21	40	193	66	37	23	73	104	0	303

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	5%	6%	4%	5%	4%	6%	5%	3%	7%	5%	5%	8%	5%	5%	3%	9%	5%	5%	0%	5%
Bills show one big change in first year, then stay the same for the following four years	5%	5%	6%	2%	5%	3%	6%	2%	6%	5%	5%	3%	4%	5%	5%	0%	8%	3%	0%	5%
Bills change steadily every year, so that customers do not see big changes from year to year	90%	89%	90%	93%	90%	91%	90%	95%	87%	90%	90%	90%	91%	91%	92%	91%	86%	92%	0%	90%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%
No of respondents	303	79	124	95	73	124	106	65	83	154	21	40	193	66	37	23	73	104	0	303





3.6 Other Company Information

GENDER

	Total
Male	47%
Female	53%
No of respondents	303

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	44%
Jointly responsible for household finances along with spouse/partner	19%
Contributor to shared household expenses (e.g. house/flatmate, parents)	6%
Payment through private rent	20%
Payment through Council rent/social housing	11%
Other	0%
Refused	0%
No of respondents	303

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	37%
Employed Part-time (9-29 hours)	7%
Retired	27%
Not working and not looking for work	9%
Student	10%
Not working and looking for work	10%
Other	0%
Refused	1%
No of respondents	303

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	0%
B	5%
C	5%
D	15%
E	3%
F	3%
G	1%
H	0%
Don't know	69%
No of respondents	303

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	2%
Don't increase / should reduce charges	2%
Generally receive good level of service / happy with service	1%
Service is reliable	0%
Want a water meter installed	1%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	2%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	1%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	1%
Other	4%
None	75%
Don't know	13%
Refused	0%
No of respondents	303

**Please note: multiple responses were allowed in this question



3.7 Views of your sewerage customers in WoC areas

For respondents views of the total water and sewerage package please refer to reports on specific water only companies.

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)?

(% who consider it fairly important/very important)

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Education	94%	89%	86%	97%	94%
Transport	98%	93%	85%	94%	95%
Health Services	99%	97%	92%	99%	98%
Crime Prevention	99%	98%	90%	98%	97%
Environment	98%	97%	92%	93%	96%
Cost of Living	98%	98%	94%	98%	96%
Immigration	66%	79%	63%	80%	86%
Water and Sewerage Services	99%	96%	94%	95%	98%
Utility Services	98%	97%	92%	96%	98%
TOTAL	94%	94%	88%	95%	95%
No of respondents	302	258	250	245	250

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Protecting the water environment	8%	31%	19%	9%	52%
Improving air quality	30%	47%	35%	43%	35%
Reducing climate change	51%	51%	54%	38%	30%
More activity on nature conservation etc	7%	10%	10%	21%	8%
Reducing litter and household waste	44%	29%	34%	31%	21%
Improvements to tackling flooding	7%	13%	13%	35%	10%
Encouraging people to use less water	4%	5%	9%	12%	29%
No of respondents	303	260	254	250	250

Q4. WHICH OF THE SERVICES PROVIDED BY YOUR WATER & SEWERAGE COMPANY DO YOU FEEL ARE MOST IMPORTANT?

(multiple response question)

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Providing safe, reliable, clean drinking water	88%	80%	81%	61%	86%
Removal and treatment of waste water	49%	48%	42%	45%	46%
Dealing with sewer flooding	9%	33%	18%	22%	24%
Maintaining pipes, treatment works, and other infrastructure	43%	37%	36%	34%	41%
Protecting the water environment	14%	27%	26%	27%	16%
Drainage of roads	11%	18%	14%	23%	17%
Dealing with customer complaints & enquiries	10%	15%	15%	38%	33%
Helping to reduce greenhouse gas emissions & tackle climate change	9%	10%	14%	26%	15%
No of respondents	303	260	254	250	250

Q7. APPROXIMATELY HOW MUCH DO YOU PAY FOR YOUR WATER AND SEWERAGE SERVICE PER YEAR?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
£1 - £99	2%	5%	1%	0%	3%
£100 - £199	11%	8%	8%	7%	18%
£200 - £299	22%	23%	17%	24%	28%
£300 - £399	35%	25%	22%	37%	28%
£400 - £499	19%	10%	24%	13%	7%
£500 - £599	6%	8%	6%	7%	6%
£600 - £699	3%	8%	9%	5%	7%
£700 - £799	1%	7%	3%	3%	0%
£800 - £899	0%	1%	2%	2%	1%
£900 - £999	1%	1%	1%	0%	2%
£1000 +	1%	6%	6%	1%	0%
TOTAL	100%	100%	100%	100%	100%
No of respondents	102	106	155	97	102

Q8. HOW CONFIDENT ARE YOU THAT YOU HAVE ESTIMATED YOUR BILLS ACCURATELY?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Not at all confident	10%	12%	6%	7%	23%
Not very confident	25%	20%	32%	19%	13%
Fairly confident	56%	57%	48%	39%	51%
Very confident	8%	11%	12%	24%	14%
Don't know	2%	0%	2%	11%	0%
TOTAL	100%	100%	100%	100%	100%
No of respondents	102	106	155	97	102

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Completely unacceptable	11%	12%	15%	17%	6%
Unacceptable	30%	23%	32%	19%	57%
Acceptable	45%	62%	43%	43%	30%
Very acceptable	0%	2%	2%	10%	1%
Don't know/can't say	14%	2%	8%	12%	6%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250



Q17. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SEWERAGE SERVICE IN TERMS OF VALUE FOR MONEY?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	3%	5%	4%	3%	2%
Fairly poor value for money	17%	17%	15%	6%	28%
Neither poor nor good value for money	15%	11%	14%	11%	32%
Fairly good value for money	47%	53%	52%	38%	31%
Very good value for money	7%	11%	6%	27%	4%
Don't know/can't say	11%	2%	9%	14%	2%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

(1 represents very poor value for money and 5 represents very good value for money)

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Mean value for money score	3.43	3.50	3.45	3.93	3.07
No of respondents	303	260	254	250	250

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE BILL?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Completely unacceptable	8%	7%	6%	15%	10%
Unacceptable	30%	25%	32%	20%	54%
Acceptable	47%	63%	51%	48%	31%
Very acceptable	1%	2%	1%	7%	0%
Don't know/can't say	14%	3%	10%	10%	6%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS UNACCEPTABLE?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
I don't value the improvements	4%	7%	3%	16%	11%
Improvements not worth the money	4%	8%	5%	28%	19%
Too expensive already	56%	61%	70%	44%	58%
Cannot afford it	18%	9%	7%	2%	5%
Oppose paying so much for a natural resource	3%	1%	2%	0%	1%
Oppose paying so much to companies who make large profits	8%	9%	10%	6%	5%
Oppose paying more to water companies when so much water is lost in leakage	4%	0%	2%	2%	0%
Other	1%	0%	0%	0%	0%
Don't know/can't say	1%	4%	0%	1%	1%
TOTAL	100%	100%	100%	100%	100%
No of respondents	114	85	98	86	158

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS ACCEPTABLE?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
I value the improvements	33%	33%	36%	10%	43%
Improvements are worth the money	4%	10%	23%	19%	14%
Plan is affordable	57%	51%	34%	69%	36%
Have no choice but to pay	1%	0%	0%	1%	0%
Other	0%	1%	0%	0%	0%
Don't know/can't say	5%	5%	8%	1%	6%
TOTAL	100%	100%	100%	100%	100%
No of respondents	146	168	131	138	77

Q28a. VALUE FOR MONEY OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	2%	2%	2%	6%	4%
Fairly poor value for money	17%	15%	11%	12%	18%
Neither poor nor good value for money	22%	25%	32%	14%	30%
Fairly good value for money	27%	33%	35%	37%	28%
Very good value for money	22%	24%	18%	20%	19%
Don't know/can't say	9%	1%	2%	12%	2%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

Ensure a reliable and continuous sewerage service for the removal and treatment of sewage

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	1%	3%	2%	3%	3%
Fairly poor value for money	18%	13%	11%	11%	13%
Neither poor nor good value for money	22%	21%	31%	8%	34%
Fairly good value for money	25%	37%	34%	35%	26%
Very good value for money	24%	25%	21%	30%	21%
Don't know/can't say	9%	1%	1%	13%	2%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250



ESSEX & SUFFOLK WATER



Sutton and East Surrey Water



Avoid risk of homes being flooded with sewage

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	1%	3%	2%	3%	2%
Fairly poor value for money	18%	15%	12%	10%	18%
Neither poor nor good value for money	23%	19%	30%	10%	28%
Fairly good value for money	25%	38%	34%	32%	27%
Very good value for money	24%	24%	22%	32%	23%
Don't know/can't say	8%	1%	1%	13%	2%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

Avoid risk of properties being flooded with sewage outside the home

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	1%	2%	2%	4%	3%
Fairly poor value for money	19%	15%	11%	9%	20%
Neither poor nor good value for money	21%	22%	30%	13%	27%
Fairly good value for money	27%	37%	34%	32%	27%
Very good value for money	23%	24%	22%	29%	22%
Don't know/can't say	9%	1%	1%	12%	2%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	2%	3%	2%	5%	4%
Fairly poor value for money	17%	15%	12%	11%	22%
Neither poor nor good value for money	21%	22%	30%	12%	26%
Fairly good value for money	28%	37%	34%	40%	31%
Very good value for money	22%	21%	20%	20%	14%
Don't know/can't say	9%	2%	1%	12%	3%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	1%	2%	2%	2%	5%
Fairly poor value for money	17%	13%	12%	10%	12%
Neither poor nor good value for money	22%	23%	30%	10%	32%
Fairly good value for money	26%	40%	33%	35%	30%
Very good value for money	24%	22%	20%	33%	18%
Don't know/can't say	9%	0%	2%	11%	3%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.55	3.62	3.58	3.61	3.41
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.59	3.68	3.62	3.90	3.50
Avoid risk of homes being flooded with sewage	3.58	3.68	3.63	3.94	3.52
Avoid risk of properties being flooded with sewage outside the home	3.57	3.66	3.64	3.83	3.46
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.54	3.59	3.58	3.67	3.29
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.59	3.68	3.59	3.98	3.45
No of respondents	303	260	254	250	250

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Very poor value for money	3%	7%	8%	14%	5%
Fairly poor value for money	24%	20%	18%	13%	21%
Neither poor nor good value for money	35%	20%	33%	10%	43%
Fairly good value for money	27%	35%	32%	26%	22%
Very good value for money	3%	18%	9%	26%	6%
Don't know/can't say	7%	0%	0%	11%	3%
TOTAL	100%	100%	100%	100%	100%
No of respondents	303	260	254	250	250

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Thames Water	Essex & Suffolk Water	South East Water	Sutton & East Surrey Water	Three Valleys Water
Total sewerage bill by 2014-15	3.03	3.37	3.16	3.40	3.03
No of respondents	303	260	254	250	250

1. Key Findings

Three Valleys Water is a water company billing 1,179,200 properties for water services. Sewerage services for Three Valleys Water are provided by Thames Water.

Uninformed Views of Current and Future Services

88% of customers stated that they were **satisfied** with the services provided by Three Valleys Water, whereas 5% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there were no problems with the service (46%), it was a good/reliable service with no interruptions (17%) and that it was good value for money (15%). The main reasons that customers were dissatisfied was that it was too expensive already (38%), the water was poor/unreliable (31%) and the prices are always increasing (15%).

43% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that they valued the service (52%), the service was worth the money (25%) and the bill was affordable (16%). 35% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (92%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Three Valleys Water and Thames Water respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 31% felt that the overall company plan was **acceptable**, 63% felt that it was **unacceptable**, and 6% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

35% of customers stated that the current water service was **good value for money**, 35% stated the current sewerage service (provided by Thames Water) was good value for money, and 31% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that they valued the service (45%), the service was worth the money (32%) and that the bill was affordable (14%).

30% of customers stated that the current water service was **poor value for money**, 30% stated the current sewerage service was poor value for money, and 30% felt that their current service overall was poor value for money. The main reason that customers felt that overall the current service offers poor value for money was that it was too expensive already (92%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.06 for **water** services, 3.07 for **sewerage** services, and 3.01 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Three Valleys Water's water and Thames Water's sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

33% of customers felt that Three Valleys Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that they valued the improvements (47%) and that the plan is affordable (35%).

62% of customers felt that Three Valleys Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (53%) and that the improvements are not worth the money (21%).

31% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that they valued the improvements (43%), the plan is affordable (36%) and the improvements are worth the money (14%).

64% of customers felt that Thames Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, (Q23) the main reasons being that it was too expensive already (58%), the improvements are not worth the money (19%) and they don't value the improvements (11%).

31% of customers felt that Three Valleys Water's and Thames Water's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (40%), they valued the improvements (40%) and the improvements are worth the money (15%).

61% of customers felt that the DBPs as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (56%), that the improvements are not worth the money (19%) and that they don't value the improvements (10%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.10 for Three Valleys Water's **water** services, 3.03 for Thames Water's **sewerage** services, and 3.02 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 31% (water service), 28% (sewerage) and 28% (service overall). The proportion of customers rating the proposed DBP services as poor value for money were 26% (water service), 26% (sewerage service) and 25% (service overall).

Timing

90% of Three Valleys Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years
	Ensure the safety of tap water - drinking water quality	99.98% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 5,556 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	106 properties at risk of low water pressure at the tap. Supplies to 812 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	99.2% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 2 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £150
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	2,630 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	3,673 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £111
	CURRENT AVERAGE TOTAL BILL = £261	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	0%	3%	1%	5%	1%	2%	3%	0%	2%	0%	5%	2%	3%	0%	3%	3%	2%	0%	2%
Fairly poor value for money	28%	29%	27%	28%	29%	31%	23%	35%	26%	26%	9%	19%	32%	25%	41%	39%	27%	13%	8%	29%
Neither poor nor good value for money	33%	25%	30%	40%	29%	31%	36%	32%	33%	33%	41%	51%	27%	47%	29%	27%	28%	35%	38%	32%
Fairly good value for money	33%	46%	33%	28%	31%	35%	36%	27%	36%	34%	50%	23%	34%	22%	26%	30%	32%	48%	54%	32%
Very good value for money	2%	0%	3%	2%	5%	2%	2%	2%	2%	3%	0%	2%	3%	0%	2%	0%	7%	2%	0%	3%
Don't know/can't say	2%	0%	3%	0%	2%	2%	2%	2%	3%	2%	0%	0%	2%	3%	2%	0%	3%	2%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	250	28	132	88	62	124	53	63	66	121	22	43	164	36	58	33	60	63	13	237

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.06	3.18	3.06	3.02	3.02	3.06	3.13	2.89	3.14	3.10	3.41	3.00	3.04	2.91	2.88	2.85	3.12	3.35	3.46	3.03
No of respondents	250	28	132	88	62	124	53	63	66	121	22	43	164	36	58	33	60	63	13	237

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015	
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£10	
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 10 years	Maintain current service	£9	
	99.98% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£2	
	Approximately 5,556 customer complaints to water company about the appearance, taste or smell of tap water each year	12% reduction in complaints about tap water	£0	
	106 properties at risk of low water pressure at the tap. Supplies to 812 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 100 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 614	£0	
	99.2% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0	
	Water supplies could occasionally be disrupted e.g. by extreme events	44 assets better protected from severe weather safeguarding service for 400,000 people	£1	
	Fish and wildlife at 2 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 0 sites; plus water levels at 0 sites will be restored and protected enabling fish and wildlife to thrive	£0	
WATER BILL - FROM £149 IN 2010 TO £167 IN 2014/5			£17	
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	In addition to maintaining current service, reduce odour emissions at 8 sites	-£1	
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£5	
	2,630 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 1,411 properties at risk of internal flooding from sewers at least once in ten years	£3	
	3,673 areas at risk of external flooding from sewers at least once in ten years	4,296 areas at risk of external flooding from sewers at least once in ten years	<50p	
	Sewerage system could occasionally be disrupted e.g. by extreme events	28 sites better protected from severe weather (flooding) safeguarding service for 3 million people	<50p	
	280km of river of poor/bad quality, 2,850km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 320km of river maintained or improved to better support fish and 120km to better support other wildlife. 1 lake restored and protected to support wildlife. Completion of the Lee Tunnel to halve sewage overflows to the Thames Tideway.	£13	
	SEWERAGE BILL - FROM £113 IN 2010 TO £134 IN 2014/5			£22
	TOTAL COMBINED BILL - FROM £262 IN 2010 TO £301 BY 2014/5			£39

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	2%	18%	34%	33%	12%	2%	250
Ensure a reliable and continuous water supply	3%	22%	28%	30%	14%	2%	250
Ensure the safety of tap water – drinking water quality	3%	16%	34%	31%	14%	2%	250
Manage the appearance, taste and smell of tap water	2%	16%	33%	32%	16%	2%	250
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	15%	32%	30%	18%	2%	250
Handle customers' accounts, queries, complaints and customers with special needs	2%	14%	32%	34%	17%	2%	250
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3%	24%	28%	27%	17%	2%	250
Manage the amount of water taken from the environment to supply customers	4%	13%	31%	29%	20%	3%	250
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	18%	30%	28%	19%	2%	250
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3%	13%	34%	26%	21%	2%	250
Avoid risk of homes being flooded with sewage	2%	18%	28%	27%	23%	2%	250
Avoid risk of properties being flooded with sewage outside the home	3%	20%	27%	27%	22%	2%	250
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	4%	22%	26%	31%	14%	3%	250
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	5%	12%	32%	30%	18%	3%	250
TOTAL	3%	17%	31%	30%	18%	2%	250

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.36	3.64	3.39	3.25	3.42	3.41	3.19	3.44	3.32	3.34	3.23	2.95	3.42	2.97	3.41	3.67	3.43	3.31	3.77	3.34
Ensure a reliable and continuous water supply	3.31	3.54	3.33	3.22	3.47	3.35	3.04	3.29	3.31	3.32	3.23	2.86	3.39	2.71	3.41	3.73	3.50	3.15	3.31	3.31
Ensure the safety of tap water – drinking water quality	3.38	3.57	3.41	3.30	3.45	3.43	3.22	3.48	3.34	3.36	3.18	3.09	3.43	2.86	3.43	3.64	3.52	3.38	3.69	3.37
Manage the appearance, taste and smell of tap water	3.44	3.56	3.43	3.45	3.47	3.46	3.43	3.52	3.40	3.42	3.32	3.19	3.48	3.14	3.48	3.61	3.55	3.38	3.85	3.42
Manage the pressure of water in your taps and the number of unplanned interruptions	3.48	3.56	3.55	3.38	3.57	3.54	3.37	3.47	3.38	3.54	3.32	3.12	3.55	2.83	3.53	3.76	3.68	3.46	3.77	3.46
Handle customers' accounts, queries, complaints and customers with special needs	3.51	3.56	3.53	3.49	3.67	3.52	3.33	3.56	3.54	3.47	3.45	3.14	3.56	3.00	3.57	3.85	3.61	3.48	3.92	3.49
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.31	3.37	3.39	3.19	3.52	3.30	3.19	3.35	3.26	3.32	3.18	2.86	3.42	2.80	3.22	3.70	3.39	3.41	4.00	3.27
Manage the amount of water taken from the environment to supply customers	3.51	3.58	3.55	3.46	3.57	3.55	3.43	3.58	3.52	3.47	3.23	3.30	3.58	3.06	3.48	3.75	3.68	3.52	3.92	3.49
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.41	3.59	3.45	3.33	3.56	3.37	3.40	3.56	3.32	3.39	3.32	3.26	3.45	3.14	3.45	3.64	3.49	3.34	3.77	3.39
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.50	3.63	3.50	3.49	3.52	3.55	3.37	3.74	3.35	3.46	3.45	3.33	3.53	3.20	3.52	3.82	3.60	3.39	3.77	3.49
Avoid risk of homes being flooded with sewage	3.52	3.78	3.54	3.44	3.72	3.53	3.33	3.56	3.47	3.54	3.33	3.14	3.60	3.00	3.60	3.88	3.68	3.42	3.69	3.52
Avoid risk of properties being flooded with sewage outside the home	3.46	3.56	3.58	3.26	3.67	3.48	3.24	3.51	3.34	3.50	3.23	3.23	3.51	2.91	3.41	3.94	3.63	3.40	4.00	3.43
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.29	3.41	3.41	3.09	3.43	3.30	3.20	3.28	3.16	3.37	3.00	2.98	3.38	2.80	3.25	3.55	3.53	3.25	4.00	3.25
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.45	3.81	3.54	3.23	3.55	3.46	3.29	3.45	3.33	3.52	3.24	3.19	3.47	2.91	3.33	3.87	3.83	3.30	3.77	3.43
TOTAL	3.43	3.58	3.47	3.33	3.54	3.45	3.29	3.49	3.36	3.43	3.26	3.12	3.49	2.95	3.44	3.74	3.58	3.37	3.80	3.40
No of respondents	250	28	129	88	60	124	52	62	65	119	22	43	163	35	58	33	58	62	13	233

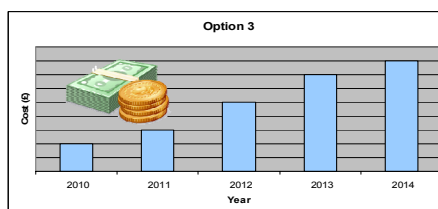
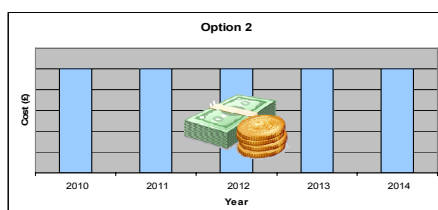
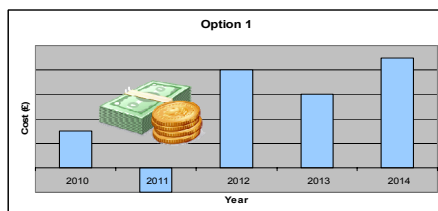
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

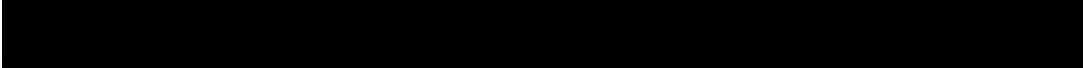
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	20%	4%	27%	14%	27%	21%	11%	11%	18%	25%	27%	26%	19%	19%	17%	15%	27%	17%	8%	20%
Ensure a reliable and continuous water supply	63%	61%	55%	77%	58%	60%	68%	78%	56%	59%	59%	67%	62%	67%	74%	67%	60%	51%	15%	65%
Ensure the safety of tap water – drinking water quality	74%	75%	72%	77%	69%	73%	79%	73%	71%	76%	68%	70%	75%	69%	84%	85%	77%	59%	46%	76%
Manage the appearance, taste and smell of tap water	58%	68%	58%	53%	55%	60%	53%	57%	52%	61%	45%	44%	62%	33%	64%	82%	55%	56%	46%	58%
Manage the pressure of water in your taps and the number of unplanned interruptions	10%	18%	12%	6%	16%	10%	6%	8%	6%	14%	5%	7%	12%	11%	5%	9%	12%	14%	31%	9%
Handle customers' accounts, queries, complaints and customers with special needs	10%	0%	11%	11%	8%	9%	9%	14%	14%	5%	9%	21%	7%	14%	7%	12%	15%	3%	8%	10%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	0%	2%	1%	3%	1%	2%	3%	0%	2%	0%	9%	0%	3%	0%	0%	2%	3%	0%	2%
Manage the amount of water taken from the environment to supply customers	3%	4%	5%	1%	2%	5%	2%	2%	3%	4%	0%	5%	3%	3%	3%	9%	2%	2%	0%	3%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	4%	3%	5%	3%	3%	6%	5%	3%	3%	9%	5%	3%	8%	3%	0%	2%	5%	0%	4%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	4%	0%	5%	3%	5%	2%	9%	6%	3%	3%	0%	7%	4%	11%	2%	0%	3%	5%	8%	4%
Avoid risk of homes being flooded with sewage	4%	0%	3%	7%	5%	2%	8%	6%	6%	2%	5%	5%	4%	11%	3%	3%	3%	2%	8%	4%
Avoid risk of properties being flooded with sewage outside the home	*%	0%	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	2%	0%	0%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	0%	2%	1%	3%	1%	2%	5%	0%	1%	0%	2%	1%	3%	0%	3%	2%	2%	0%	2%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	0%	2%	2%	2%	2%	2%	2%	3%	1%	5%	2%	1%	3%	0%	3%	3%	0%	0%	2%
No of respondents	250	28	132	88	62	124	53	63	66	121	22	43	164	36	58	33	60	63	13	237

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	8%	4%	12%	2%	8%	9%	6%	2%	9%	10%	5%	2%	10%	8%	7%	6%	10%	6%	0%	8%
Bills show one big change in first year, then stay the same for the following four years	3%	7%	3%	1%	3%	2%	4%	0%	2%	5%	0%	7%	2%	0%	5%	3%	3%	2%	0%	3%
Bills change steadily every year, so that customers do not see big changes from year to year	90%	89%	85%	97%	89%	89%	91%	98%	89%	85%	95%	91%	88%	92%	88%	91%	87%	92%	100%	89%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	250	28	132	88	62	124	53	63	66	121	22	43	164	36	58	33	60	63	13	237





3.6 Other Company Information

GENDER

	Total
Male	44%
Female	56%
No of respondents	250

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	55%
Jointly responsible for household finances along with spouse/partner	36%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	2%
Payment through Council rent/social housing	4%
Other	0%
Refused	0%
No of respondents	250

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	35%
Employed Part-time (9-29 hours)	13%
Retired	30%
Not working and not looking for work	12%
Student	3%
Not working and looking for work	5%
Other	0%
Refused	2%
No of respondents	250

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	0%
B	1%
C	4%
D	12%
E	8%
F	2%
G	5%
H	1%
Don't know	66%
No of respondents	250

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	1%
Don't increase / should reduce charges	6%
Generally receive good level of service / happy with service	3%
Service is reliable	0%
Want a water meter installed	*%
Improve the waters appearance / colour / quality / taste	*%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	1%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	*%
Improve drainage system / solve problems with blockages	*%
Deal with hard water / lime scale problem	*%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	1%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	*%
Improve level of service / customer service / customer information	*%
Reduce the number / there are too many chemicals added to water	*%
Reduce number of leakages / increase repairs to pipes	*%
Other	2%
None	80%
Don't know	5%
Refused	0%
No of respondents	250

**Please note: multiple responses were allowed in this question
Three Valleys Water

1. Key Findings

United Utilities is a water and sewerage company billing 2,783,400 properties for water and 2,759,750 properties for sewerage services.

Uninformed Views of Current and Future Services

77% of customers stated that they were **satisfied** with the services provided by United Utilities, whereas 15% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (49%) and that the water was good quality/clean (43%). The main reasons that customers were dissatisfied was that prices are always increasing (63%) and that it was too expensive already (24%).

71% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (54%) and the service was worth the money (35%). 10% of customers stated that the current water and sewerage service was poor value for money, the main reason being that it was too expensive already (92%).

Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 64% felt that the overall company plan was **acceptable**, 34% felt that it was **unacceptable**, and 2% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each service aspect including the average bill levels (showcard A).

53% of customers stated that the current water service was **good value for money**, 52% stated the current sewerage service was good value for money, and 54% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (53%), the service was worth the money (30%) and that they valued the service (16%).

19% of customers stated that the current water service was **poor value for money**, 19% stated the current sewerage service was poor value for money, and 19% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was too expensive already (60%), it was not worth the money (22%) and they cannot afford it (16%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.35 for **water** services, 3.34 for **sewerage** services, and 3.34 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

64% of customers felt that United Utilities' DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that the plan is affordable (76%) and the improvements are worth the money (19%).

34% of customers felt that United Utilities' DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (67%), they cannot afford it (16%) and that the improvements are not worth the money (15%).

64% of customers felt that United Utilities' DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (77%) and the improvements are worth the money (18%).

35% of customers felt that United Utilities' DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (65%), they cannot afford it (17%) and that the improvements are not worth the money (15%).

63% of customers felt that United Utilities' DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (77%) and the improvements are worth the money (18%).

34% of customers felt that United Utilities' DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (66%), they cannot afford it (16%) and that the improvements are not worth the money (15%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.27 for **water** services, 3.29 for **sewerage** services, and 3.29 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 56% (water service), 57% (sewerage) and 57% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 26% (water service), 24% (sewerage service) and 25% (service overall).

Timing

92% of United Utilities' customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 20 years
	Ensure the safety of tap water - drinking water quality	99.94% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 26,045 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	509 properties at risk of low water pressure at the tap. Supplies to 5,625 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	91.9% of billing enquiries answered within 5 days and 99.4% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.1% calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 7 sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £158
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	434 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	1,258 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	430km of river of poor/bad quality, 2,270km of river at risk from weed growth that can be harmful to wildlife, 3 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £186
	CURRENT AVERAGE TOTAL BILL = £344	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	2%	2%	4%	1%	0%	2%	4%	3%	2%	2%	3%	0%	3%	3%	7%	0%	0%	2%	3%	2%
Fairly poor value for money	17%	14%	19%	16%	7%	12%	26%	18%	20%	13%	23%	23%	15%	35%	3%	5%	7%	20%	12%	18%
Neither poor nor good value for money	27%	32%	22%	30%	19%	25%	32%	29%	25%	27%	7%	26%	29%	30%	33%	23%	25%	26%	34%	25%
Fairly good value for money	51%	52%	55%	46%	74%	56%	35%	45%	49%	57%	47%	49%	53%	33%	50%	73%	68%	47%	45%	53%
Very good value for money	2%	0%	1%	5%	0%	4%	2%	3%	4%	1%	13%	2%	1%	0%	7%	0%	0%	3%	3%	2%
Don't know/can't say	1%	0%	0%	2%	0%	1%	1%	3%	0%	0%	7%	0%	0%	0%	0%	0%	0%	1%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	309	44	134	128	54	131	122	76	103	130	30	53	224	40	30	22	56	161	58	251

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.35	3.34	3.31	3.38	3.67	3.49	3.04	3.27	3.32	3.41	3.46	3.30	3.34	2.93	3.47	3.68	3.61	3.29	3.33	3.35
No of respondents	309	44	134	128	54	131	122	76	103	130	30	53	224	40	30	22	56	161	58	251

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	£14
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 20 years	Maintain current service	£5
	99.94% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£13
	Approximately 26,045 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0
	509 properties at risk of low water pressure at the tap. Supplies to 5,625 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 350 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 1,000	£1
	91.9% of billing enquiries answered within 5 days and 99.4% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.1% calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	46 assets better protected from severe weather safeguarding service for 2.6 million people	<50p
	Fish and wildlife at 7 sites suffer from (or are at risk of) low water levels caused by abstraction of water	Reduce amount of abstraction at 5 sites; plus water levels at 5 sites will be restored and protected enabling fish and wildlife to thrive	£1
WATER BILL - FROM £160 IN 2010 TO £186 IN 2014/5			£26
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	-£8
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£4
	434 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 260 properties at risk of internal flooding from sewers at least once in ten years	<50p
	1,258 areas at risk of external flooding from sewers at least once in ten years	1,275 areas at risk of external flooding from sewers at least once in ten years	<50p
	Sewerage system could occasionally be disrupted e.g. by extreme events	Maintain current service	£0
	430km of river of poor/bad quality, 2,270km of river at risk from weed growth that can be harmful to wildlife, 3 bathing waters which do not meet minimum standards	An additional: 100km of river can better support fish; plus 90km can better support other wildlife; plus 1 wetlands and 1 lakes are restored and protected to support wildlife; plus 10 bathing waters are improved.	£26
	SEWERAGE BILL - FROM £191 IN 2010 TO £203 IN 2014/5		
TOTAL COMBINED BILL - FROM £351 IN 2010 TO £390 BY 2014/5			£39

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	5%	10%	31%	43%	11%	1%	309
Ensure a reliable and continuous water supply	5%	10%	19%	53%	12%	*%	309
Ensure the safety of tap water – drinking water quality	4%	11%	16%	56%	13%	*%	309
Manage the appearance, taste and smell of tap water	4%	11%	17%	57%	12%	*%	309
Manage the pressure of water in your taps and the number of unplanned interruptions	4%	12%	22%	51%	11%	0%	309
Handle customers’ accounts, queries, complaints and customers with special needs	4%	11%	22%	52%	11%	*%	309
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	5%	11%	28%	45%	10%	1%	309
Manage the amount of water taken from the environment to supply customers	5%	10%	21%	50%	13%	1%	309
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	5%	11%	24%	48%	11%	1%	309
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	5%	10%	18%	53%	13%	1%	309
Avoid risk of homes being flooded with sewage	5%	11%	22%	50%	12%	*%	309
Avoid risk of properties being flooded with sewage outside the home	5%	11%	23%	49%	12%	*%	309
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	5%	10%	28%	45%	11%	1%	309
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	5%	11%	22%	50%	12%	*%	309
TOTAL	4%	11%	22%	50%	12%	1%	309

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	3.45	3.57	3.33	3.52	3.80	3.55	3.18	3.30	3.56	3.44	3.31	3.62	3.43	3.15	3.67	3.55	3.60	3.41	3.57	3.42
Ensure a reliable and continuous water supply	3.58	3.68	3.51	3.62	3.91	3.68	3.33	3.42	3.65	3.62	3.31	3.81	3.57	3.26	3.70	3.82	3.93	3.48	3.74	3.54
Ensure the safety of tap water – drinking water quality	3.63	3.66	3.56	3.69	3.94	3.75	3.38	3.47	3.70	3.68	3.31	3.87	3.63	3.23	3.73	3.77	3.93	3.59	3.76	3.60
Manage the appearance, taste and smell of tap water	3.61	3.70	3.53	3.67	3.89	3.73	3.36	3.45	3.66	3.68	3.38	3.81	3.60	3.23	3.77	3.77	3.89	3.56	3.67	3.60
Manage the pressure of water in your taps and the number of unplanned interruptions	3.55	3.61	3.48	3.59	3.87	3.65	3.30	3.38	3.59	3.61	3.33	3.70	3.54	3.20	3.63	3.64	3.82	3.51	3.64	3.53
Handle customers’ accounts, queries, complaints and customers with special needs	3.55	3.61	3.48	3.60	3.93	3.71	3.22	3.37	3.64	3.59	3.40	3.70	3.54	3.13	3.73	3.73	3.80	3.51	3.58	3.55
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3.44	3.50	3.40	3.47	3.83	3.57	3.14	3.26	3.51	3.50	3.27	3.46	3.47	3.10	3.60	3.55	3.76	3.38	3.57	3.42
Manage the amount of water taken from the environment to supply customers	3.58	3.64	3.52	3.61	3.87	3.74	3.28	3.36	3.66	3.64	3.33	3.69	3.59	3.23	3.70	3.73	3.85	3.53	3.71	3.55
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.50	3.55	3.44	3.54	3.87	3.63	3.21	3.34	3.56	3.55	3.25	3.67	3.50	3.18	3.60	3.77	3.80	3.43	3.64	3.47
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.59	3.68	3.53	3.62	3.91	3.74	3.29	3.42	3.61	3.67	3.24	3.69	3.61	3.21	3.70	3.86	3.87	3.53	3.75	3.55
Avoid risk of homes being flooded with sewage	3.54	3.61	3.50	3.55	3.85	3.70	3.24	3.39	3.58	3.60	3.27	3.70	3.54	3.23	3.63	3.73	3.84	3.48	3.67	3.51
Avoid risk of properties being flooded with sewage outside the home	3.53	3.59	3.47	3.56	3.87	3.68	3.21	3.36	3.58	3.58	3.28	3.64	3.53	3.20	3.67	3.73	3.75	3.48	3.60	3.51
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.48	3.64	3.38	3.50	3.87	3.60	3.17	3.30	3.54	3.52	3.21	3.56	3.50	3.18	3.67	3.45	3.71	3.44	3.58	3.45
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.54	3.64	3.49	3.56	3.85	3.68	3.25	3.40	3.57	3.59	3.21	3.62	3.56	3.20	3.70	3.73	3.77	3.49	3.60	3.52
TOTAL	3.54	3.62	3.47	3.58	3.88	3.67	3.25	3.37	3.60	3.59	3.29	3.68	3.54	3.19	3.68	3.70	3.81	3.49	3.65	3.52
No of respondents	309	44	133	127	54	129	122	76	101	130	29	52	224	39	30	22	55	161	58	249

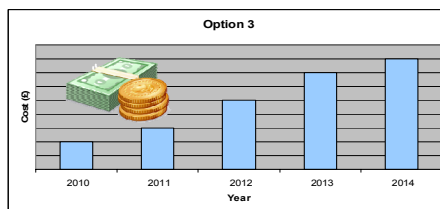
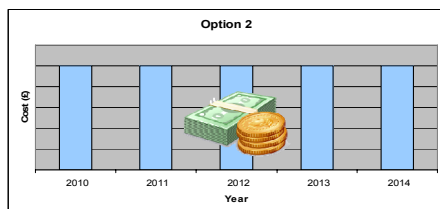
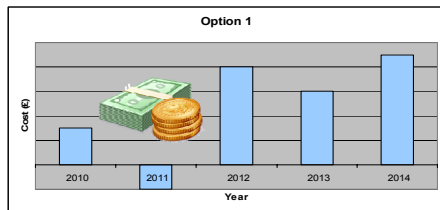
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	25%	25%	20%	29%	33%	20%	25%	38%	24%	18%	20%	30%	24%	43%	13%	18%	21%	25%	29%	24%
Ensure a reliable and continuous water supply	79%	80%	84%	75%	69%	82%	81%	72%	82%	82%	63%	83%	80%	80%	70%	91%	77%	80%	76%	80%
Ensure the safety of tap water – drinking water quality	69%	77%	71%	63%	74%	66%	70%	67%	64%	73%	57%	81%	67%	70%	80%	59%	71%	66%	55%	72%
Manage the appearance, taste and smell of tap water	25%	27%	21%	27%	11%	23%	33%	34%	20%	22%	27%	23%	25%	28%	27%	23%	30%	22%	31%	23%
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	2%	3%	2%	6%	2%	2%	4%	2%	2%	3%	0%	3%	3%	3%	0%	5%	1%	2%	2%
Handle customers' accounts, queries, complaints and customers with special needs	17%	23%	17%	15%	6%	16%	23%	9%	21%	18%	23%	17%	16%	33%	17%	9%	14%	15%	14%	18%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3%	2%	4%	3%	2%	3%	4%	4%	4%	2%	7%	2%	3%	0%	3%	0%	2%	5%	9%	2%
Manage the amount of water taken from the environment to supply customers	1%	2%	1%	0%	4%	0%	1%	1%	1%	1%	0%	2%	1%	3%	0%	0%	2%	1%	0%	1%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	1%	0%	0%	2%	0%	2%	0%	0%	1%	1%	0%	0%	1%	0%	0%	0%	0%	1%	0%	1%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	25%	27%	25%	23%	43%	25%	16%	22%	25%	26%	33%	21%	25%	25%	40%	14%	11%	29%	19%	26%
Avoid risk of homes being flooded with sewage	6%	5%	7%	7%	7%	6%	7%	4%	10%	5%	0%	9%	7%	0%	3%	14%	5%	8%	2%	8%
Avoid risk of properties being flooded with sewage outside the home	1%	0%	1%	2%	0%	1%	2%	1%	3%	0%	3%	0%	1%	0%	3%	0%	0%	2%	0%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	0%	1%	0%	0%	1%	1%	0%	1%	1%	0%	0%	1%	0%	3%	0%	0%	1%	3%	0%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	*%	0%	0%	1%	2%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
No of respondents	309	44	134	128	54	131	122	76	103	130	30	53	224	40	30	22	56	161	58	251

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	2%	2%	1%	1%	2%	3%	0%	1%	0%	3%	0%	0%	2%	0%	0%	0%	2%	2%	2%	2%
Bills show one big change in first year, then stay the same for the following four years	7%	7%	8%	5%	11%	8%	3%	7%	7%	7%	7%	4%	8%	3%	10%	9%	14%	4%	3%	8%
Bills change steadily every year, so that customers do not see big changes from year to year	92%	91%	90%	94%	87%	89%	97%	92%	93%	90%	93%	96%	90%	98%	90%	91%	84%	93%	95%	91%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	309	44	134	128	54	131	122	76	103	130	30	53	224	40	30	22	56	161	58	251



3.6 Other Company Information

GENDER

	Total
Male	56%
Female	44%
No of respondents	309

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	52%
Jointly responsible for household finances along with spouse/partner	45%
Contributor to shared household expenses (e.g. house/flatmate, parents)	4%
Payment through private rent	0%
Payment through Council rent/social housing	0%
Other	0%
Refused	0%
No of respondents	309

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	41%
Employed Part-time (9-29 hours)	6%
Retired	41%
Not working and not looking for work	6%
Student	1%
Not working and looking for work	5%
Other	0%
Refused	*%
No of respondents	309

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	11%
B	10%
C	10%
D	12%
E	2%
F	0%
G	1%
H	0%
Don't know	53%
No of respondents	309

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	1%
Don't increase / should reduce charges	3%
Generally receive good level of service / happy with service	6%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	*%
Have difficulty paying water bill with limited income / pension	*%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	*%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	0%
Reduce bad smells	0%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	2%
None	87%
Don't know	0%
Refused	0%
No of respondents	309

**Please note: multiple responses were allowed in this question



1. Key Findings

Wessex Water is a water and sewerage company billing 499,000 properties for water and 1,030,040 properties for sewerage services.

Uninformed Views of Current and Future Services

84% of customers stated that they were **satisfied** with the services provided by Wessex Water, whereas 5% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there was a good/reliable service with no interruptions (56%), there were no problems with the service (16%) and the water was good quality/clean (13%). The main reasons that customers were dissatisfied was that the water was poor/unreliable (69%) and the prices are always increasing (23%).

55% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the service was worth the money (42%), the bill was affordable (35%) and they valued the service (23%). 20% of customers stated that the current water and sewerage service was poor value for money, the main reasons being that it was not worth the money (50%), it was too expensive already (28%) and they did not value the service (13%).

Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 69% felt that the overall company plan was **acceptable**, 22% felt that it was **unacceptable**, and 9% stated that they did not know.

Informed Views on Current Service

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about current service levels for each aspect including the average bill levels (showcard A).

61% of customers stated that the current water service was **good value for money**, 62% stated the current sewerage service was good value for money, and 59% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current service offers good value for money were that the bill was affordable (51%), the service was worth the money (29%) and they valued the service (18%).

15% of customers stated that the current water service was **poor value for money**, 14% stated the current sewerage service was poor value for money, and 14% felt that their current service overall was poor value for money. The main reasons that customers felt that overall the current service offers poor value for money were that it was not worth the money (53%) and that it was too expensive already (42%).

The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.75 for **water** services, 3.76 for **sewerage** services, and 3.64 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts of each service aspect as well as the expected total change in the average bill.

Acceptability/Unacceptability

70% of customers felt that Wessex Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reason being that the plan is affordable (88%).

23% of customers felt that Wessex Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (72%) and that the improvements are not worth the money (17%).

68% of customers felt that Wessex Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reason being that the plan is affordable (91%).

24% of customers felt that Wessex Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (67%) and that the improvements are not worth the money (19%).

67% of customers felt that Wessex Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (90%).

23% of customers felt that Wessex Water's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (72%) and that the improvements are not worth the money (15%).

Value for Money

The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 3.75 for **water** services, 3.71 for **sewerage** services, and 3.60 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 67% (water service), 66% (sewerage) and 60% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 16% (water service), 17% (sewerage service) and 18% (service overall).

Timing

51% of Wessex Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year, whereas 30% would like bills to show one big change in the first year, then stay the same for the following four years.



3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban less than once every 30 years
	Ensure the safety of tap water - drinking water quality	99.97% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 3,407 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	157 properties at risk of low water pressure at the tap. Supplies to 296 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.4% receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at 5 sites suffer from low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £188
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	343 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	688 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	140km of river of poor/bad quality, 1,780km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £189
	CURRENT AVERAGE TOTAL BILL = £377	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Very poor value for money	4%	0%	3%	4%	6%	3%	5%	1%	4%	5%	0%	5%	4%	5%	1%	0%	7%	5%	3%	4%
Fairly poor value for money	11%	21%	12%	7%	9%	13%	8%	5%	12%	14%	9%	10%	12%	7%	11%	11%	7%	12%	8%	13%
Neither poor nor good value for money	17%	14%	13%	22%	22%	15%	20%	22%	16%	15%	28%	18%	16%	26%	15%	6%	21%	19%	18%	17%
Fairly good value for money	34%	24%	36%	35%	41%	32%	35%	35%	34%	34%	25%	31%	38%	29%	33%	50%	29%	33%	37%	33%
Very good value for money	27%	10%	30%	30%	16%	33%	24%	33%	29%	19%	34%	30%	24%	31%	37%	28%	36%	18%	26%	27%
Don't know/can't say	7%	31%	7%	1%	6%	5%	8%	5%	3%	14%	3%	7%	6%	2%	3%	6%	0%	13%	8%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	300	29	118	134	32	141	109	83	116	101	32	61	189	42	75	36	14	133	119	181

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	3.75	3.35	3.82	3.80	3.53	3.83	3.71	3.97	3.75	3.55	3.87	3.75	3.69	3.76	3.97	4.00	3.79	3.53	3.82	3.71
No of respondents	300	29	118	134	32	141	109	83	116	101	32	61	189	42	75	36	14	133	119	181



3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	-£11
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban less than once every 30 years	Maintain current service	£6
	99.97% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£3
	Approximately 3,407 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water by around one-third	£2
	157 properties at risk of low water pressure at the tap. Supplies to 296 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 56 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 200	£0
	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but 0.4% receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	8 assets better protected from severe weather safeguarding service for 200,000 people	£6
	Fish and wildlife at 5 sites suffer from low water levels caused by abstraction of water	Reduce amount of abstraction at 3 sites; plus water levels at 3 sites will be restored and protected enabling fish and wildlife to thrive	£6
WATER BILL - FROM £188 IN 2010 TO £199 IN 2014/5			£11
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service	-£25
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£6
	343 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 134 properties at risk of internal flooding from sewers at least once in ten years	£1
	688 areas at risk of external flooding from sewers at least once in ten years	1,707 areas at risk of external flooding from sewers at least once in ten years	£1
	Sewerage system could occasionally be disrupted e.g. by extreme events	100 assets better protected from severe weather safeguarding service	<50p
	140km of river of poor/bad quality, 1,780km of river at risk from weed growth that can be harmful to wildlife, 0 bathing waters which do not meet minimum standards	An additional: 40km of river can better support fish and 170km can better support other wildlife: plus 0 wetlands and 0 lakes are restored and protected to support wildlife; plus 2 bathing waters are improved.	£13
	SEWERAGE BILL - FROM £194 IN 2010 TO £190 IN 2014/5		
TOTAL COMBINED BILL - FROM £382 IN 2010 TO £389 BY 2014/5			£7



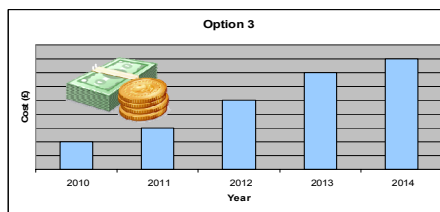
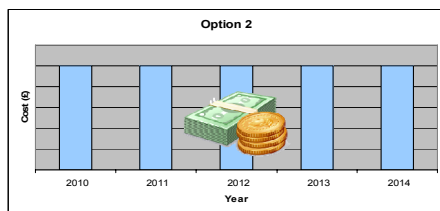
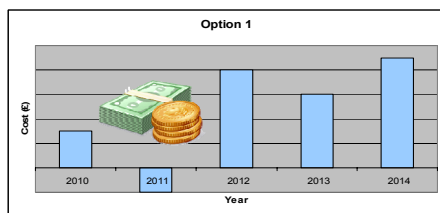
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	11%	14%	11%	12%	9%	9%	13%	13%	9%	12%	9%	18%	10%	10%	8%	6%	7%	16%	9%	13%
Ensure a reliable and continuous water supply	38%	31%	37%	39%	47%	38%	36%	40%	35%	41%	41%	39%	39%	40%	33%	39%	50%	39%	34%	41%
Ensure the safety of tap water – drinking water quality	40%	28%	45%	39%	41%	42%	41%	41%	39%	41%	50%	39%	41%	48%	43%	47%	50%	33%	36%	43%
Manage the appearance, taste and smell of tap water	42%	45%	43%	43%	38%	50%	35%	43%	45%	39%	50%	46%	42%	36%	52%	58%	71%	32%	45%	41%
Manage the pressure of water in your taps and the number of unplanned interruptions	34%	24%	39%	34%	19%	35%	36%	29%	36%	36%	44%	23%	33%	33%	40%	39%	50%	28%	41%	29%
Handle customers' accounts, queries, complaints and customers with special needs	37%	28%	31%	42%	44%	33%	41%	43%	34%	35%	28%	33%	39%	62%	43%	42%	7%	27%	49%	29%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	15%	10%	16%	14%	9%	16%	13%	19%	11%	16%	13%	15%	17%	14%	16%	11%	21%	15%	16%	14%
Manage the amount of water taken from the environment to supply customers	11%	10%	11%	12%	9%	11%	11%	7%	13%	11%	6%	10%	12%	19%	12%	3%	14%	9%	13%	9%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	3%	10%	4%	3%	6%	8%	8%	6%	5%	6%	3%	7%	5%	9%	6%	0%	6%	5%	7%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3%	3%	3%	2%	3%	3%	3%	2%	1%	5%	0%	7%	2%	0%	4%	3%	0%	3%	1%	4%
Avoid risk of homes being flooded with sewage	2%	0%	3%	1%	3%	2%	1%	1%	1%	3%	0%	3%	2%	2%	1%	0%	0%	2%	1%	2%
Avoid risk of properties being flooded with sewage outside the home	1%	3%	1%	1%	3%	0%	1%	1%	0%	2%	0%	2%	1%	0%	1%	0%	0%	2%	0%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%	0%	0%	1%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	0%	0%	1%	0%	0%	1%	0%	1%	0%	3%	0%	0%	0%	0%	0%	1%	0%	0%	1%
No of respondents	300	29	118	134	32	141	109	83	116	101	32	61	189	42	75	36	14	133	119	181

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	18%	7%	22%	19%	25%	18%	18%	18%	18%	19%	13%	13%	21%	17%	27%	25%	7%	14%	22%	16%
Bills show one big change in first year, then stay the same for the following four years	30%	31%	30%	31%	22%	32%	29%	35%	30%	27%	53%	38%	24%	36%	32%	31%	43%	26%	24%	34%
Bills change steadily every year, so that customers do not see big changes from year to year	51%	62%	48%	50%	53%	50%	52%	47%	52%	54%	34%	49%	54%	48%	41%	44%	50%	60%	54%	50%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	300	29	118	134	32	141	109	83	116	101	32	61	189	42	75	36	14	133	119	181





3.6 Other Company Information

GENDER

	Total
Male	45%
Female	55%
No of respondents	300

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	51%
Jointly responsible for household finances along with spouse/partner	44%
Contributor to shared household expenses (e.g. house/flatmate, parents)	3%
Payment through private rent	2%
Payment through Council rent/social housing	1%
Other	0%
Refused	0%
No of respondents	300

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	31%
Employed Part-time (9-29 hours)	9%
Retired	44%
Not working and not looking for work	8%
Student	1%
Not working and looking for work	5%
Other	*%
Refused	2%
No of respondents	300

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	6%
B	16%
C	22%
D	10%
E	7%
F	*%
G	*%
H	*%
Don't know	38%
No of respondents	300

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	1%
Don't increase / should reduce charges	0%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	0%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	0%
Deal with hard water / lime scale problem	*%
Reduce bad smells	*%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	0%
More frequent meter reading	0%
Improve level of service / customer service / customer information	0%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	0%
None	100%
Don't know	0%
Refused	*%
No of respondents	300

**Please note: multiple responses were allowed in this question
Wessex Water



3.7 Views of your sewerage customers in WoC areas

For respondents views of the total water and sewerage package please refer to reports on specific water only companies.

Q1. HOW IMPORTANT ARE THE FOLLOWING ISSUES TO YOU (IN THE LOCAL AREA)? (SCALE 1-5)?

(% who consider it fairly important/very important)

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Education	94%	92%	91%
Transport	93%	97%	90%
Health Services	94%	100%	92%
Crime Prevention	96%	99%	91%
Environment	88%	99%	92%
Cost of Living	93%	99%	94%
Immigration	79%	84%	72%
Water and Sewerage Services	93%	98%	92%
Utility Services	91%	99%	91%
TOTAL	91%	96%	90%
No of respondents	296	277	285

Q2. WHICH OF THE FOLLOWING ENVIRONMENTAL ISSUES ARE MOST IMPORTANT TO YOU?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Protecting the water environment	14%	43%	23%
Improving air quality	39%	39%	39%
Reducing climate change	20%	28%	31%
More activity on nature conservation etc	22%	13%	28%
Reducing litter and household waste	34%	29%	26%
Improvements to tackling flooding	28%	16%	27%
Encouraging people to use less water	16%	32%	17%
No of respondents	300	277	293

Q4. WHICH OF THE SERVICES PROVIDED BY YOUR WATER & SEWERAGE COMPANY DO YOU FEEL ARE MOST IMPORTANT?

(multiple response question)

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Providing safe, reliable, clean drinking water	50%	86%	61%
Removal and treatment of waste water	31%	51%	50%
Dealing with sewer flooding	26%	27%	29%
Maintaining pipes, treatment works, and other infrastructure	37%	51%	39%
Protecting the water environment	25%	16%	34%
Drainage of roads	24%	8%	20%
Dealing with customer complaints & enquiries	29%	29%	26%
Helping to reduce greenhouse gas emissions & tackle climate change	24%	16%	22%
No of respondents	300	277	293

Q7. APPROXIMATELY HOW MUCH DO YOU PAY FOR YOUR WATER AND SEWERAGE SERVICE PER YEAR?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
£1 - £99	0%	1%	1%
£100 - £199	5%	5%	23%
£200 - £299	18%	15%	10%
£300 - £399	26%	34%	19%
£400 - £499	23%	28%	20%
£500 - £599	8%	8%	8%
£600 - £699	8%	5%	7%
£700 - £799	0%	2%	5%
£800 - £899	3%	2%	3%
£900 - £999	1%	1%	0%
£1000 +	8%	1%	2%
TOTAL	100%	100%	100%
No of respondents	157	195	98

Q8. HOW CONFIDENT ARE YOU THAT YOU HAVE ESTIMATED YOUR BILLS ACCURATELY?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Not at all confident	4%	22%	6%
Not very confident	13%	28%	12%
Fairly confident	42%	39%	53%
Very confident	28%	12%	23%
Don't know	13%	0%	5%
TOTAL	100%	100%	100%
No of respondents	157	195	98

Q15. [UNINFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER THE COMPANY'S PLAN OVERALL?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Completely unacceptable	11%	7%	11%
Unacceptable	11%	63%	19%
Acceptable	43%	23%	53%
Very acceptable	26%	1%	8%
Don't know/can't say	9%	6%	9%
TOTAL	100%	100%	100%
No of respondents	300	277	293



Q17. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT SEWERAGE SERVICE IN TERMS OF VALUE FOR MONEY?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	4%	1%	5%
Fairly poor value for money	10%	29%	15%
Neither poor nor good value for money	17%	30%	17%
Fairly good value for money	36%	34%	41%
Very good value for money	26%	3%	14%
Don't know/can't say	7%	3%	7%
TOTAL	100%	100%	100%
No of respondents	300	277	293

(1 represents very poor value for money and 5 represents very good value for money)

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Mean value for money score	3.76	3.10	3.47
No of respondents	300	277	293

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE BILL?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Completely unacceptable	9%	2%	11%
Unacceptable	15%	47%	18%
Acceptable	50%	32%	52%
Very acceptable	18%	13%	11%
Don't know/can't say	8%	6%	8%
TOTAL	100%	100%	100%
No of respondents	300	277	293

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS UNACCEPTABLE?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
I don't value the improvements	8%	1%	5%
Improvements not worth the money	19%	13%	18%
Too expensive already	67%	70%	64%
Cannot afford it	4%	14%	9%
Oppose paying so much for a natural resource	0%	0%	1%
Oppose paying so much to companies who make large profits	1%	1%	4%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%
Other	0%	1%	0%
Don't know/can't say	0%	0%	0%
TOTAL	100%	100%	100%
No of respondents	72	135	85

Q24. WHAT IS THE MAIN REASON THAT YOU FEEL THE PLAN FOR SEWERAGE IS ACCEPTABLE?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
I value the improvements	3%	23%	11%
Improvements are worth the money	5%	27%	19%
Plan is affordable	91%	48%	65%
Have no choice but to pay	0%	0%	1%
Other	0%	0%	0%
Don't know/can't say	0%	2%	4%
TOTAL	100%	100%	100%
No of respondents	204	124	184

Q28a. VALUE FOR MONEY OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	6%	4%	9%
Fairly poor value for money	11%	19%	7%
Neither poor nor good value for money	27%	27%	26%
Fairly good value for money	35%	33%	33%
Very good value for money	17%	16%	18%
Don't know/can't say	5%	1%	6%
TOTAL	100%	100%	100%
No of respondents	300	277	293

Ensure a reliable and continuous sewerage service for the removal and treatment of sewage

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	2%	1%	6%
Fairly poor value for money	11%	11%	12%
Neither poor nor good value for money	17%	33%	15%
Fairly good value for money	40%	31%	39%
Very good value for money	25%	23%	24%
Don't know/can't say	5%	1%	5%
TOTAL	100%	100%	100%
No of respondents	300	277	293



Avoid risk of homes being flooded with sewage

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	2%	1%	5%
Fairly poor value for money	10%	9%	11%
Neither poor nor good value for money	18%	34%	19%
Fairly good value for money	37%	35%	38%
Very good value for money	27%	20%	23%
Don't know/can't say	5%	1%	4%
TOTAL	100%	100%	100%
No of respondents	300	277	293

Avoid risk of properties being flooded with sewage outside the home

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	4%	1%	6%
Fairly poor value for money	11%	14%	9%
Neither poor nor good value for money	17%	28%	22%
Fairly good value for money	39%	37%	34%
Very good value for money	25%	20%	23%
Don't know/can't say	5%	1%	6%
TOTAL	100%	100%	100%
No of respondents	300	277	293

Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	6%	3%	7%
Fairly poor value for money	10%	19%	11%
Neither poor nor good value for money	24%	28%	25%
Fairly good value for money	32%	30%	34%
Very good value for money	23%	18%	18%
Don't know/can't say	4%	2%	5%
TOTAL	100%	100%	100%
No of respondents	300	277	293

Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	3%	1%	4%
Fairly poor value for money	11%	10%	11%
Neither poor nor good value for money	17%	31%	18%
Fairly good value for money	34%	37%	38%
Very good value for money	30%	19%	23%
Don't know/can't say	5%	1%	6%
TOTAL	100%	100%	100%
No of respondents	300	277	293

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3.49	3.39	3.46
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3.79	3.64	3.67
Avoid risk of homes being flooded with sewage	3.81	3.64	3.64
Avoid risk of properties being flooded with sewage outside the home	3.72	3.62	3.62
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3.57	3.43	3.49
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3.82	3.63	3.68
No of respondents	300	277	293

Q28b. VALUE FOR MONEY OF SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Very poor value for money	5%	2%	7%
Fairly poor value for money	12%	32%	13%
Neither poor nor good value for money	12%	29%	18%
Fairly good value for money	41%	27%	34%
Very good value for money	25%	9%	23%
Don't know/can't say	5%	1%	5%
TOTAL	100%	100%	100%
No of respondents	300	277	293

Q28b. MEAN VALUE FOR MONEY SCORE OF PROPOSED SEWERAGE SERVICE LEVELS IN COMPANY PLAN OVERALL?

(1 represents very poor value for money and 5 represents very good value for money)

	Wessex Water	Bristol Water	Bournemouth & West Hampshire
Total sewerage bill by 2014-15	3.71	3.08	3.56
No of respondents	300	277	293

1. Key Findings

Yorkshire Water is a water and sewerage company billing 1,921,000 properties for water and 1,934,990 properties for sewerage services.

Uninformed Views of Current and Future Services

□ 94% of customers stated that they were **satisfied** with the services provided by Yorkshire Water, whereas 2% of customers indicated that they were dissatisfied with the service. The main reasons customers were satisfied were that there were no problems with the water (47%) and that there was a good/reliable service with no interruptions (36%). The main reasons that customers were dissatisfied were that the water was poor/unreliable (40%), the sewerage and the service in general were poor/unreliable (20%, 20%) and the water pressure was poor (20%).

□ 87% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the service was worth the money (34%), they valued the service (32%) and the bill was affordable (31%). 2% of customers stated that the current water and sewerage service was poor value for money, the main reasons being that it was too expensive already (75%) and they opposed paying so much to companies who make large profits (25%).

□ Customers were presented with a brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 95% felt that the plan was **acceptable**, 3% felt that it was **unacceptable**, and 1% stated that they did not know.

Informed Views on current service

Customers were given a brief overview of key service areas for water and sewerage levels, and were shown information about current service levels.

□ 92% of customers stated that the current water service was **good value for money**, 91% stated the current sewerage service was good value for money, and 91% felt that their current service overall was good value for money. The main reasons that customers felt that overall the current services offer good value for money were that they valued the service (36%), the bill was affordable (29%) and the service was worth the money (28%).

□ 3% of customers stated that the current water service was **poor value for money**, 2% stated the current sewerage service was poor value for money, and 2% felt that their current service overall was poor value for money. The main reasons that customers felt the current services offers poor value for money were that it was too expensive already (67%) and they opposed paying so much for a natural resource (17%).

□ The overall **mean value for money** rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 4.21 for **water** services, 4.32 for **sewerage** services, and 4.14 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief overview of key service areas for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts.

Acceptability/Unacceptability

□ 96% of customers felt that Yorkshire Water's DBP and the impacts on their bill for **water** services was **acceptable**, the main reasons being that they valued the improvements (35%), the plan is affordable (34%) and the improvements are worth the money (31%).

□ 3% of customers felt that Yorkshire Water's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (33%), they cannot afford it (22%) and they opposed paying more for a natural resource (22%).

□ 97% of customers felt that Yorkshire Water's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (36%), they valued the improvements (34%) and the improvements are worth the money (30%).

□ 2% of customers felt that Yorkshire Water's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (43%) and they cannot afford it (29%).

□ 97% of customers felt that Yorkshire Water's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (37%), they valued the improvements (35%) and the improvements are worth the money (28%).

□ 3% of customers felt that Yorkshire Water's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons being that it was too expensive already (33%), they cannot afford it (22%) and that they opposed paying more for a natural resource (22%).

Value for Money

□ The overall mean value for money rating (on a scale of 1 to 5, where 1 represents very poor value for money and 5 represents very good value for money), was 4.19 for **water** services, 4.17 for **sewerage** services, and 4.15 for services **overall**.

□ The proportion of customers rating the proposed DBP services as **good value for money** were 90% (water service), 88% (sewerage) and 88% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 1% (water service), 1% (sewerage service) and 1% (service overall).

Timing

□ 79% of Yorkshire Water's customers indicated that their preferred bill option for the period 2010 - 2015, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year, whereas 17% would like to see bills show one big change in the first year, then stay the same for the following four years.

3.3 Informed Views on Current Service

Current Provision of Water and Sewerage Services

	Service Area	Current Service Level
WATER	Maintain water pipes, treatment works and reservoirs	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water
	Ensure a reliable and continuous water supply	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 25 years
	Ensure the safety of tap water - drinking water quality	99.95% of samples meet the current quality standards for drinking water
	Manage the appearance, taste and smell of tap water	Approximately 16,283 customer complaints to water company about the appearance, taste or smell of tap water each year
	Manage the pressure of water in your taps and the number of unplanned interruptions	102 properties at risk of low water pressure at the tap. Supplies to 532 properties affected by unplanned interruptions lasting more than 12 hrs
	Handle customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 99% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone
	Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather	Water supplies could occasionally be disrupted e.g. by extreme events
	Manage the amount of water taken from the environment to supply customers	Fish and wildlife at no sites suffer from (or are at risk of) low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £145
SEWERAGE	Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment
	Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	Provide effective drainage and sewage treatment to meet current demands from existing and new customers
	Avoid risk of homes being flooded with sewage	196 properties at risk of internal flooding from sewers at least once in ten years
	Avoid risk of properties being flooded with sewage outside the home	1,077 areas at risk of external flooding from sewers at least once in ten years
	Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	Sewerage system could occasionally be disrupted e.g. by extreme events
	Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	290km of river of poor/bad quality, 1,470km of river at risk from weed growth that can be harmful to wildlife, 3 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £163
	CURRENT AVERAGE TOTAL BILL = £308	

Q16. [INFORMED VIEW] HOW DO YOU RATE YOUR CURRENT WATER SERVICE IN TERMS OF VALUE FOR MONEY?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location		
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban	
Very poor value for money	1%	1%	1%	0%	0%	2%	1%	0%	0%	2%	0%	0%	1%	0%	5%	0%	0%	0%	0%	0%	1%
Fairly poor value for money	2%	1%	3%	0%	4%	2%	1%	0%	0%	4%	0%	0%	2%	1%	0%	0%	7%	2%	0%	2%	
Neither poor nor good value for money	5%	4%	5%	6%	7%	4%	6%	6%	5%	5%	5%	4%	5%	5%	3%	0%	4%	8%	0%	5%	
Fairly good value for money	60%	55%	61%	60%	47%	61%	62%	52%	65%	59%	55%	56%	61%	69%	52%	71%	48%	55%	22%	61%	
Very good value for money	32%	36%	29%	33%	42%	31%	29%	42%	30%	28%	40%	41%	30%	24%	40%	29%	41%	33%	78%	30%	
Don't know/can't say	1%	1%	1%	0%	0%	1%	1%	0%	0%	2%	0%	0%	1%	1%	0%	0%	0%	2%	0%	1%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
No of respondents	315	69	147	93	45	129	137	69	113	133	20	27	263	101	60	28	27	99	9	306	

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Mean value for money score	4.21	4.25	4.15	4.27	4.27	4.20	4.20	4.36	4.25	4.09	4.35	4.37	4.19	4.17	4.22	4.29	4.22	4.22	4.78	4.19
No of respondents	315	69	147	93	45	129	137	69	113	133	20	27	263	101	60	28	27	99	9	306

3.4 Informed Views on Draft Business Plan 2010 onwards

Company Plan

	Current Service Level	Service Level Proposed by 2015	Change in bill by 2015
WATER	Manage and repair water pipes and equipment to maintain current supplies and quality of drinking water	Maintain current service	-£6
	Invest in new water supplies, tackle leakage and help customers use water efficiently to provide reliable water to existing and new customers - risk of hosepipe ban no more than once in 25 years	Maintain current service	£1
	99.95% of samples meet the current quality standards for drinking water	Improve drinking water quality with the aim of <u>all</u> samples meeting the current standards	£3
	Approximately 16,283 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water	£0
	102 properties at risk of low water pressure at the tap. Supplies to 532 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 24 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 209	£0
	100% of billing enquiries answered within 5 days and 99% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls but no calls receive engaged tone	Maintain current service, improving service where possible by working more effectively	£0
	Water supplies could occasionally be disrupted e.g. by extreme events	0 assets better protected from severe weather safeguarding service	£0
	Fish and wildlife at no sites suffer from (or are at risk of) low water levels caused by abstraction of water	Maintain current service	£0
WATER BILL - FROM £145 IN 2010 TO £139 IN 2014/5			-£6
SEWERAGE	Manage and repair sewers and equipment to ensure customers continue to receive current standards of drainage and sewage treatment	Maintain current service for all aspects and reduce smells from sewage treatment works for 230 properties	£0
	Provide effective drainage and sewage treatment to meet current demands from existing and new customers	Ensure drainage and sewage treatment works can cope with extra demand from existing and new customers	£1
	196 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 126 properties at risk of internal flooding from sewers at least once in ten years	£1
	1,077 areas at risk of external flooding from sewers at least once in ten years	3,242 areas at risk of external flooding from sewers at least once in ten years	£0
	Sewerage system could occasionally be disrupted e.g. by extreme events	81 assets better protected from severe weather safeguarding service	£0
	290km of river of poor/bad quality, 1,470km of river at risk from weed growth that can be harmful to wildlife, 3 bathing waters which do not meet minimum standards	An additional: 390km of river can better support fish and 0km can better support other wildlife: plus 1 wetlands and 0 lakes are restored and protected to support wildlife; plus 0 bathing waters are improved.	£11
	SEWERAGE BILL - FROM £167 IN 2010 TO £177 IN 2014/5		
TOTAL COMBINED BILL - FROM £313 IN 2010 TO £316 BY 2014/5			£3

Q28a. VALUE FOR MONEY OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

	Very poor value for money	Fairly poor value for money	Neither poor nor good value for money	Fairly good value for money	Very good value for money	Don't know	No. of respondents
Maintain water pipes, treatment works and reservoirs	0%	0%	5%	34%	61%	1%	315
Ensure a reliable and continuous water supply	0%	*%	5%	30%	64%	1%	315
Ensure the safety of tap water – drinking water quality	0%	*%	5%	32%	62%	*%	315
Manage the appearance, taste and smell of tap water	0%	*%	6%	33%	61%	1%	315
Manage the pressure of water in your taps and the number of unplanned interruptions	0%	1%	6%	39%	54%	*%	315
Handle customers’ accounts, queries, complaints and customers with special needs	0%	1%	8%	41%	50%	*%	315
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	0%	1%	14%	52%	32%	*%	315
Manage the amount of water taken from the environment to supply customers	0%	1%	8%	47%	44%	*%	315
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	0%	1%	15%	52%	31%	*%	315
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	0%	1%	7%	53%	39%	*%	315
Avoid risk of homes being flooded with sewage	0%	1%	6%	57%	36%	*%	315
Avoid risk of properties being flooded with sewage outside the home	0%	1%	8%	58%	33%	*%	315
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	0%	1%	18%	50%	30%	1%	315
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	0%	1%	8%	59%	32%	*%	315
TOTAL	0%	1%	8%	46%	45%	0%	315

Q28a. MEAN VALUE FOR MONEY SCORE OF PROPOSED SERVICE LEVELS IN COMPANY PLAN?

(1 represents very poor value for money and 5 represents very good value for money)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	4.57	4.64	4.50	4.60	4.47	4.57	4.59	4.65	4.54	4.55	4.55	4.67	4.56	4.61	4.53	4.75	4.26	4.57	4.78	4.56
Ensure a reliable and continuous water supply	4.58	4.65	4.50	4.65	4.45	4.59	4.62	4.65	4.58	4.55	4.53	4.67	4.58	4.63	4.62	4.75	4.26	4.55	4.89	4.57
Ensure the safety of tap water – drinking water quality	4.56	4.65	4.47	4.61	4.51	4.57	4.57	4.70	4.53	4.52	4.65	4.59	4.56	4.62	4.60	4.71	4.22	4.54	4.67	4.56
Manage the appearance, taste and smell of tap water	4.55	4.69	4.45	4.59	4.52	4.58	4.51	4.62	4.55	4.50	4.50	4.59	4.55	4.59	4.53	4.71	4.26	4.55	4.67	4.54
Manage the pressure of water in your taps and the number of unplanned interruptions	4.46	4.61	4.36	4.48	4.42	4.44	4.48	4.55	4.44	4.42	4.30	4.63	4.46	4.51	4.50	4.54	4.22	4.42	4.67	4.45
Handle customers’ accounts, queries, complaints and customers with special needs	4.41	4.54	4.34	4.45	4.40	4.42	4.40	4.54	4.41	4.36	4.35	4.48	4.42	4.51	4.35	4.57	4.22	4.36	4.56	4.41
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4.16	4.29	4.11	4.16	4.13	4.19	4.13	4.16	4.21	4.12	4.00	4.11	4.19	4.32	4.12	4.36	4.04	4.01	4.22	4.16
Manage the amount of water taken from the environment to supply customers	4.36	4.54	4.27	4.35	4.31	4.36	4.35	4.41	4.36	4.33	4.20	4.30	4.38	4.48	4.23	4.54	4.15	4.31	4.56	4.35
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4.14	4.29	4.10	4.11	4.02	4.21	4.10	4.14	4.18	4.11	3.95	4.15	4.16	4.30	4.13	4.39	4.04	3.95	4.33	4.14
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	4.32	4.43	4.27	4.30	4.29	4.33	4.30	4.38	4.33	4.27	4.20	4.33	4.32	4.45	4.25	4.57	4.15	4.19	4.56	4.31
Avoid risk of homes being flooded with sewage	4.28	4.46	4.22	4.26	4.18	4.30	4.29	4.36	4.28	4.24	4.20	4.30	4.29	4.44	4.25	4.46	4.15	4.13	4.22	4.29
Avoid risk of properties being flooded with sewage outside the home	4.25	4.38	4.21	4.23	4.18	4.27	4.23	4.30	4.23	4.23	4.15	4.22	4.26	4.40	4.25	4.43	4.07	4.08	4.22	4.25
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	4.10	4.23	4.07	4.06	4.05	4.16	4.04	4.07	4.15	4.08	3.89	3.89	4.15	4.25	4.12	4.39	4.00	3.89	4.22	4.10
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	4.23	4.35	4.20	4.17	4.13	4.28	4.19	4.29	4.23	4.19	4.10	4.19	4.24	4.35	4.23	4.46	4.07	4.07	4.22	4.23
TOTAL	4.35	4.48	4.29	4.36	4.29	4.38	4.34	4.42	4.36	4.32	4.26	4.37	4.37	4.46	4.34	4.55	4.15	4.26	4.48	4.35
No of respondents	315	69	145	93	45	129	135	68	113	132	20	27	261	100	60	28	27	98	9	304

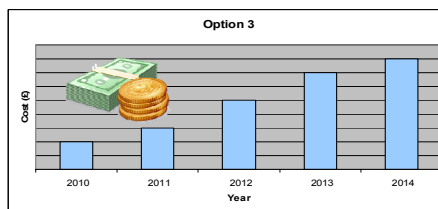
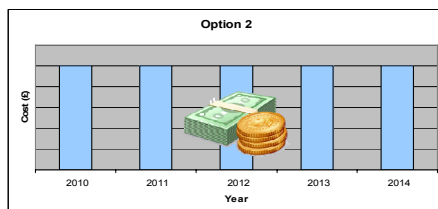
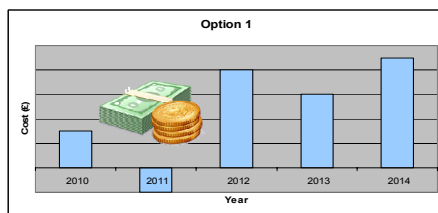
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED? (multiple response question)

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	12%	16%	10%	13%	11%	10%	14%	12%	11%	14%	10%	11%	13%	19%	15%	18%	7%	3%	0%	12%
Ensure a reliable and continuous water supply	54%	61%	56%	45%	49%	56%	53%	57%	45%	59%	30%	33%	58%	66%	50%	61%	70%	36%	22%	55%
Ensure the safety of tap water – drinking water quality	71%	71%	70%	72%	71%	70%	72%	67%	71%	74%	65%	59%	73%	84%	57%	71%	70%	67%	33%	72%
Manage the appearance, taste and smell of tap water	48%	36%	48%	56%	42%	43%	53%	57%	45%	46%	50%	48%	48%	57%	38%	21%	41%	54%	11%	49%
Manage the pressure of water in your taps and the number of unplanned interruptions	19%	13%	20%	20%	18%	17%	20%	20%	23%	14%	35%	26%	17%	19%	13%	11%	11%	26%	11%	19%
Handle customers' accounts, queries, complaints and customers with special needs	13%	9%	12%	17%	20%	12%	12%	19%	14%	9%	25%	22%	11%	6%	22%	7%	7%	18%	56%	12%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	16%	17%	14%	17%	13%	18%	15%	20%	17%	13%	10%	33%	14%	5%	28%	21%	7%	20%	56%	15%
Manage the amount of water taken from the environment to supply customers	6%	6%	7%	6%	7%	5%	7%	10%	4%	7%	0%	4%	7%	3%	10%	7%	4%	8%	0%	7%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	6%	7%	5%	8%	7%	7%	6%	7%	8%	5%	10%	4%	6%	6%	10%	11%	0%	5%	11%	6%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	9%	10%	10%	8%	7%	15%	5%	3%	12%	11%	10%	0%	10%	8%	8%	14%	11%	9%	22%	9%
Avoid risk of homes being flooded with sewage	10%	14%	13%	3%	2%	15%	9%	4%	12%	12%	5%	7%	11%	11%	13%	11%	19%	5%	0%	10%
Avoid risk of properties being flooded with sewage outside the home	2%	3%	1%	1%	0%	1%	2%	0%	2%	2%	0%	0%	2%	3%	3%	0%	0%	0%	0%	2%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	1%	1%	0%	0%	2%	0%	0%	1%	1%	0%	4%	0%	1%	2%	0%	0%	0%	0%	1%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
No of respondents	315	69	147	93	45	129	137	69	113	133	20	27	263	101	60	28	27	99	9	306

3.5 Preferred Bill Profile

Q31. WHICH BILL OPTION WOULD YOU PREFER?

	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Bills change every year according to how much work water companies have to do	4%	3%	5%	4%	9%	3%	3%	7%	3%	4%	0%	0%	5%	4%	5%	0%	15%	2%	0%	4%
Bills show one big change in first year, then stay the same for the following four years	17%	20%	18%	14%	16%	16%	19%	22%	14%	17%	10%	19%	17%	25%	17%	21%	30%	5%	0%	18%
Bills change steadily every year, so that customers do not see big changes from year to year	79%	77%	77%	82%	76%	81%	78%	71%	83%	79%	90%	81%	78%	71%	78%	79%	56%	93%	100%	78%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	315	69	147	93	45	129	137	69	113	133	20	27	263	101	60	28	27	99	9	306



3.6 Other Company Information

GENDER

	Total
Male	43%
Female	57%
No of respondents	315

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	53%
Jointly responsible for household finances along with spouse/partner	39%
Contributor to shared household expenses (e.g. house/flatmate, parents)	1%
Payment through private rent	1%
Payment through Council rent/social housing	5%
Other	0%
Refused	0%
No of respondents	315

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	33%
Employed Part-time (9-29 hours)	10%
Retired	27%
Not working and not looking for work	11%
Student	1%
Not working and looking for work	17%
Other	0%
Refused	*%
No of respondents	315

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	23%
B	11%
C	9%
D	5%
E	2%
F	1%
G	0%
H	0%
Don't know	49%
No of respondents	315

Q38. WERE THERE ANY CURRENT ISSUES NOT ALREADY DISCUSSED RELATING TO WATER/SEWERAGE, OR PAYING YOUR BILL THAT YOU HAD IN MIND WHEN ANSWERING THESE QUESTIONS?

	Total
High cost of water charges / expensive service	*%
Don't increase / should reduce charges	*%
Generally receive good level of service / happy with service	0%
Service is reliable	0%
Want a water meter installed	0%
Improve the waters appearance / colour / quality / taste	1%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	0%
Solve the water pressure problem	1%
Consumers shouldn't have to pay for beach / coastline cleaning	0%
Water meters should be installed nationally	0%
Solve the problems that cause flooding	0%
Improve drainage system / solve problems with blockages	*%
Deal with hard water / lime scale problem	0%
Reduce bad smells	*%
Have special rates for certain customer groups (pensioners, families)	0%
Increase in charges should be linked to improvements	0%
Protect nature / wildlife / environment	0%
Plan should already be in action / already doing things like this	0%
Water company should be responsible for all areas of pipe network	*%
More frequent meter reading	0%
Improve level of service / customer service / customer information	*%
Reduce the number / there are too many chemicals added to water	0%
Reduce number of leakages / increase repairs to pipes	0%
Other	2%
None	95%
Don't know	1%
Refused	0%
No of respondents	315

**Please note: multiple responses were allowed in this question

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