

Understanding customers' views

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

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 (both specified elsewhere) 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 two company areas in Wales. A separate report includes the findings for the 20 English 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 two subsequent sections to this report, one for each water company. 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.

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

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

Table 1.1 Sequence of company reports

Section in report	Company
1	Dee Valley
2	Welsh Water Dwr Cymru

- 1.3.4 Both in this and the England 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 for Dee Valley Water is Welsh Water Dŵr Cymru.
- 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

Dee Valley Water is a water company billing 107,600 properties for water services. Sewerage services for Dee Valley Water are provided by Welsh Water/Dŵr Cymru.

Uninformed Views of Current and Future Services

93% of customers stated that they were **satisfied** with the services provided by Dee Valley Water, whereas 2% 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%), there were no problems with the service (20%) and that the water was good quality/clean (18%). The main reasons that customers were dissatisfied was that it was too expensive already (33%), there was a poor/unreliable water service (33%) and other reasons (33%).

74% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (58%) and they valued the service (36%). 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 (81%).

Customers were presented with a brief description of proposed new water and sewerage service levels for 2010-15 (provided by Dee Valley Water and Welsh Water/Dŵr Cymru respectively) and the overall bill increase (to mirror the likely level of information people will receive in reality – therefore a relatively uninformed view). 77% felt that the overall company plan was **acceptable**, 19% 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).

71% of customers stated that the current water service was **good value for money**, 70% stated the current sewerage service (provided by Welsh Water/Dŵr Cymru) was good value for money, and 69% 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 (52%) and they valued the service (38%).

10% of customers stated that the current water service was **poor value for money**, 12% 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 too expensive already (60%) and it was not worth the money (28%).

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 3.66 for **water** services, 3.64 for **sewerage** services, and 3.63 for services **overall**.

Informed Views on the Draft Business Plan (DBP)

Customers were given a brief description of 14 key service aspects for Dee Valley Water's water and Welsh Water's/Dŵr Cymru'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

83% of customers felt that Dee Valley 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 (27%).

13% of customers felt that Dee Valley 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 they cannot afford it (15%).

83% of customers felt that Welsh Water's/Dŵr Cymru'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 (25%).

13% of customers felt that Welsh Water's/Dŵr Cymru's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (57%), they cannot afford it (14%) and that the improvements are not worth the money (14%).

82% of customers felt that Dee Valley Water's and Welsh Water's/Dŵr Cymru's DBPs as a whole and the impacts on their **overall** bill were **acceptable**, the main reasons being that the plan is affordable (70%) and they valued the improvements (25%).

14% 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 (59%) and they cannot afford it (14%).

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 3.66 for Dee Valley Water's **water** services, 3.64 for Welsh Water's/Dŵr Cymru's **sewerage** services, and 3.64 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 60% (water service), 59% (sewerage) and 59% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 12% (water service), 13% (sewerage service) and 13% (service overall).

Timing

95% of Dee Valley 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 Dee Valley Water customers, reported in section 3, are based on a sample of 257. 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%	88%	87%	91%	91%	89%	89%	93%	87%	89%	85%	96%	89%	81%	97%	75%	88%	95%	100%	88%
Transport	88%	86%	84%	92%	87%	88%	88%	93%	84%	88%	83%	96%	87%	81%	97%	75%	83%	93%	97%	86%
Health Services	89%	86%	88%	92%	91%	90%	89%	93%	87%	90%	87%	96%	89%	81%	97%	74%	90%	95%	100%	88%
Crime Prevention	90%	88%	89%	92%	93%	90%	90%	93%	87%	92%	87%	96%	90%	81%	97%	75%	93%	96%	100%	89%
Environment	89%	84%	89%	92%	91%	89%	90%	91%	87%	91%	87%	96%	89%	79%	97%	75%	90%	96%	97%	88%
Cost of Living	90%	91%	88%	92%	89%	90%	92%	93%	88%	91%	87%	96%	91%	81%	97%	78%	88%	97%	97%	89%
Immigration	75%	77%	74%	76%	67%	78%	77%	73%	78%	75%	63%	93%	77%	60%	82%	72%	64%	86%	97%	73%
Water and Sewerage Services	88%	84%	88%	91%	85%	90%	89%	89%	87%	89%	85%	96%	88%	81%	95%	75%	86%	95%	97%	87%
Utility Services	89%	88%	87%	92%	87%	90%	90%	91%	87%	90%	83%	96%	90%	81%	97%	75%	88%	95%	100%	88%
TOTAL	88%	86%	86%	90%	87%	88%	88%	90%	85%	88%	83%	96%	88%	78%	95%	75%	86%	94%	98%	86%
No of respondents	256	43	119	90	54	105	97	45	89	122	52	28	161	42	39	36	41	98	30	226

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	32%	16%	31%	41%	35%	38%	24%	40%	26%	33%	40%	32%	31%	38%	31%	28%	33%	31%	33%	32%
Improving air quality	32%	35%	36%	26%	31%	35%	29%	36%	31%	31%	23%	18%	37%	26%	28%	42%	40%	29%	30%	32%
Reducing climate change	53%	60%	54%	47%	53%	48%	59%	58%	51%	53%	40%	57%	53%	52%	41%	69%	43%	56%	70%	51%
More activity on nature conservation etc	11%	7%	9%	14%	15%	11%	8%	9%	16%	8%	8%	21%	10%	17%	8%	11%	5%	12%	20%	10%
Reducing litter and household waste	26%	37%	26%	19%	27%	22%	29%	18%	30%	25%	31%	29%	22%	21%	26%	25%	31%	26%	17%	27%
Improvements to tackling flooding	15%	16%	12%	20%	15%	13%	18%	16%	16%	15%	23%	21%	11%	14%	15%	8%	17%	17%	17%	15%
Encouraging people to use less water	7%	12%	8%	4%	9%	9%	5%	4%	10%	7%	8%	7%	8%	5%	13%	0%	7%	9%	7%	7%
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	77%	84%	72%	82%	65%	80%	80%	73%	81%	76%	83%	82%	74%	76%	90%	58%	81%	78%	80%	77%
Removal and treatment of waste water	70%	77%	68%	70%	62%	70%	74%	69%	66%	72%	69%	75%	69%	57%	82%	53%	76%	73%	83%	68%
Dealing with sewer flooding	69%	79%	67%	70%	62%	68%	74%	71%	65%	71%	63%	75%	70%	57%	79%	69%	69%	69%	73%	68%
Maintaining pipes, treatment works, and other infrastructure	72%	79%	70%	73%	62%	70%	79%	73%	64%	76%	67%	82%	72%	64%	74%	58%	74%	78%	83%	70%
Protecting the water environment	68%	72%	64%	71%	62%	67%	73%	69%	67%	68%	71%	75%	65%	55%	79%	56%	71%	72%	70%	68%
Managing water pollution from agriculture and manufacturing	58%	63%	54%	63%	58%	52%	65%	67%	55%	58%	63%	61%	57%	50%	79%	50%	62%	55%	60%	58%
Drainage of roads	65%	72%	58%	70%	65%	57%	72%	67%	63%	65%	63%	68%	64%	67%	69%	56%	60%	67%	77%	63%
Reducing litter in waterways	58%	63%	56%	60%	51%	50%	69%	64%	48%	62%	52%	64%	59%	55%	67%	42%	55%	62%	67%	56%
Preventing flooding from rivers	54%	58%	51%	57%	51%	49%	61%	64%	46%	55%	60%	57%	51%	55%	59%	39%	55%	56%	57%	53%
Managing canal systems	49%	42%	50%	51%	44%	48%	53%	53%	40%	53%	50%	46%	50%	48%	62%	36%	52%	47%	57%	48%
Helping to reduce greenhouse gas emissions and tackle climate change	47%	49%	47%	49%	49%	43%	52%	51%	42%	50%	46%	64%	46%	48%	62%	36%	50%	45%	37%	49%
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227



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	76%	86%	73%	78%	64%	77%	82%	78%	73%	78%	73%	89%	75%	71%	90%	61%	76%	79%	90%	74%
Removal and treatment of waste water	54%	58%	51%	58%	55%	53%	54%	64%	55%	49%	56%	46%	54%	52%	54%	42%	64%	54%	60%	53%
Dealing with sewer flooding	15%	7%	14%	20%	16%	18%	10%	11%	24%	10%	13%	25%	14%	10%	15%	19%	12%	16%	17%	15%
Maintaining pipes, treatment works, and other infrastructure	47%	58%	47%	46%	53%	40%	53%	56%	42%	49%	48%	43%	46%	52%	33%	42%	48%	53%	63%	45%
Protecting the water environment	21%	19%	27%	13%	24%	23%	16%	20%	21%	20%	29%	29%	16%	21%	15%	19%	24%	21%	27%	20%
Drainage of roads	12%	7%	13%	13%	18%	11%	9%	13%	12%	11%	17%	14%	11%	12%	8%	11%	10%	15%	10%	12%
Dealing with customer complaints & enquiries	17%	14%	17%	17%	27%	15%	13%	13%	19%	17%	17%	14%	17%	19%	13%	19%	19%	16%	17%	17%
Helping to reduce greenhouse gas emissions & tackle climate change	11%	5%	18%	6%	7%	17%	7%	11%	7%	15%	4%	14%	13%	5%	3%	22%	12%	13%	10%	11%
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fairly dissatisfied	2%	0%	3%	2%	11%	0%	0%	0%	2%	3%	2%	4%	2%	0%	5%	0%	7%	1%	7%	2%
Neither satisfied nor dissatisfied	5%	2%	8%	2%	7%	4%	4%	2%	7%	4%	6%	4%	4%	0%	5%	14%	2%	4%	7%	4%
Fairly satisfied	72%	81%	71%	69%	56%	73%	79%	71%	73%	72%	60%	79%	74%	74%	72%	78%	64%	72%	70%	72%
Very satisfied	21%	16%	18%	27%	25%	23%	16%	27%	18%	21%	33%	14%	19%	26%	18%	8%	26%	22%	17%	22%
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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	33%	0%	50%	0%	33%	0%	0%	0%	0%	50%	0%	0%	50%	0%	0%	0%	33%	100%	0%	50%
Prices always increasing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Poor / unreliable - unspecified	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Poor / unreliable - water	33%	0%	25%	50%	33%	0%	0%	0%	0%	50%	0%	100%	25%	0%	50%	0%	33%	0%	50%	25%
Poor / unreliable - sewerage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	33%	0%	25%	50%	33%	0%	0%	0%	100%	0%	100%	0%	25%	0%	50%	0%	33%	0%	50%	25%
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%	0%	100%	100%	100%	0%	0%	0%	100%	100%	100%	100%	100%	0%	100%	0%	100%	100%	100%	100%
No of respondents	6	0	4	2	6	0	0	0	2	4	1	1	4	0	2	0	3	1	2	4

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	44%	52%	43%	42%	49%	39%	47%	50%	43%	42%	33%	46%	46%	45%	63%	39%	34%	42%	46%	44%
Good value for money	13%	7%	14%	13%	13%	14%	13%	11%	19%	11%	17%	23%	11%	21%	0%	13%	26%	10%	12%	14%
Water is good quality / clean	18%	19%	17%	21%	16%	19%	19%	11%	21%	19%	19%	23%	17%	10%	11%	26%	13%	25%	27%	17%
No flooding	0%	0%	0%	1%	0%	1%	0%	2%	0%	0%	0%	4%	0%	0%	0%	0%	0%	1%	0%	0%
No problems - unspecified	20%	14%	22%	20%	22%	25%	13%	25%	15%	21%	31%	4%	20%	14%	23%	16%	26%	19%	15%	20%
No problems - water	4%	5%	4%	3%	0%	2%	8%	0%	2%	6%	0%	0%	6%	10%	3%	6%	0%	2%	0%	4%
No problems - sewerage	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%
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	239	42	107	86	45	101	93	44	81	114	48	26	151	42	35	31	38	93	26	213

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	96%	91%	96%	98%	100%	93%	96%	100%	97%	93%	100%	96%	96%	98%	92%	94%	100%	95%	100%	95%
Water and sewerage services in 2 separate bills	1%	0%	1%	1%	0%	1%	1%	0%	1%	1%	0%	4%	1%	0%	3%	3%	0%	0%	0%	1%
Don't know	4%	9%	3%	1%	0%	6%	3%	0%	2%	6%	0%	0%	3%	2%	5%	3%	0%	5%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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

	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
£1 - £99	4%	13%	4%	2%	0%	5%	6%	12%	3%	1%	7%	0%	4%	10%	0%	0%	0%	8%	0%	5%
£100 - £199	13%	13%	12%	14%	17%	14%	10%	15%	15%	10%	17%	17%	10%	19%	7%	15%	14%	10%	11%	13%
£200 - £299	17%	9%	11%	28%	17%	20%	14%	12%	32%	6%	43%	11%	8%	16%	33%	8%	14%	15%	11%	18%
£300 - £399	27%	30%	31%	23%	14%	29%	33%	39%	18%	30%	19%	33%	30%	35%	19%	38%	29%	21%	37%	26%
£400 - £499	24%	26%	25%	22%	17%	20%	33%	15%	21%	32%	14%	33%	27%	19%	30%	19%	14%	33%	21%	25%
£500 - £599	5%	0%	4%	8%	9%	6%	2%	6%	5%	4%	0%	0%	8%	0%	7%	0%	7%	8%	5%	5%
£600 - £699	4%	4%	7%	2%	11%	5%	0%	0%	2%	9%	0%	6%	6%	0%	4%	12%	7%	2%	16%	3%
£700 - £799	2%	0%	1%	3%	6%	2%	0%	0%	3%	1%	0%	0%	3%	0%	0%	8%	4%	0%	0%	2%
£800 - £899	1%	0%	1%	0%	3%	0%	0%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	2%	0%	1%
£900 - £999	1%	4%	1%	0%	6%	0%	0%	0%	0%	3%	0%	0%	2%	0%	0%	0%	7%	0%	0%	1%
£1000 +	1%	0%	3%	0%	0%	2%	2%	0%	0%	3%	0%	0%	2%	0%	0%	0%	4%	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	164	23	75	65	35	66	63	33	62	69	42	18	103	31	27	26	28	52	19	145

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

	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
Not at all confident	1%	0%	1%	2%	3%	2%	0%	3%	0%	1%	2%	0%	1%	0%	0%	4%	0%	2%	5%	1%
Not very confident	18%	30%	17%	15%	23%	17%	17%	27%	15%	17%	10%	17%	22%	26%	22%	27%	18%	8%	21%	18%
Fairly confident	71%	61%	73%	71%	66%	67%	78%	52%	76%	75%	69%	72%	71%	58%	74%	65%	71%	79%	74%	70%
Very confident	6%	0%	3%	12%	9%	11%	0%	9%	8%	3%	14%	6%	3%	10%	4%	4%	7%	6%	0%	7%
Don't know	4%	9%	5%	0%	0%	5%	5%	9%	2%	3%	5%	6%	3%	6%	0%	0%	4%	6%	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	164	23	75	65	35	66	63	33	62	69	42	18	103	31	27	26	28	52	19	145

Q9. HOW DO YOU RATE YOUR CURRENT WATER & 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	1%	0%	1%	0%	3%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	4%	0%	0%	1%
Fairly poor value for money	12%	9%	13%	12%	14%	11%	13%	12%	10%	14%	5%	17%	15%	10%	7%	15%	18%	12%	11%	12%
Neither poor nor good value for money	12%	9%	13%	11%	17%	11%	10%	0%	21%	9%	14%	11%	11%	10%	4%	12%	21%	12%	0%	13%
Fairly good value for money	65%	70%	64%	63%	51%	68%	68%	70%	60%	67%	62%	72%	64%	61%	85%	65%	46%	65%	84%	62%
Very good value for money	9%	4%	7%	14%	11%	9%	8%	12%	10%	7%	17%	0%	8%	19%	4%	8%	7%	8%	5%	10%
Don't know	2%	9%	1%	0%	3%	2%	2%	6%	0%	1%	2%	0%	2%	0%	0%	0%	4%	4%	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	164	23	75	65	35	66	63	33	62	69	42	18	103	31	27	26	28	52	19	145

Q10. MAIN REASON YOU FEEL YOUR CURRENT WATER & SEWERAGE SERVICES ARE 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	5%	0%	9%	0%	0%	14%	0%	0%	9%	0%	0%	6%	0%	0%	0%	17%	0%	0%	5%	
Not worth the money	5%	0%	0%	13%	17%	0%	0%	0%	17%	0%	0%	0%	6%	0%	0%	25%	0%	0%	5%	
Too expensive already	81%	100%	82%	75%	50%	86%	100%	100%	67%	82%	50%	100%	81%	67%	100%	75%	67%	100%	100%	79%
Cannot afford it	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Oppose paying so much for a natural resource	5%	0%	0%	13%	17%	0%	0%	0%	17%	0%	50%	0%	0%	33%	0%	0%	0%	0%	0%	5%
Oppose paying so much to companies who make large profits	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Oppose paying more to water companies when so much water is lost in leakage	5%	0%	9%	0%	17%	0%	0%	0%	0%	9%	0%	0%	6%	0%	0%	0%	17%	0%	5%	
Only person living in property	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%	
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%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
No of respondents	21	2	11	8	6	7	8	4	6	11	2	3	16	3	2	4	6	6	2	19

Q11. MAIN REASON YOU FEEL YOUR CURRENT WATER & SEWERAGE SERVICES OFFER 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	36%	41%	28%	44%	59%	33%	29%	44%	35%	33%	42%	8%	39%	52%	54%	26%	27%	24%	53%	34%
Service is worth the money	5%	6%	6%	4%	5%	4%	6%	4%	7%	4%	3%	8%	5%	0%	4%	0%	13%	8%	0%	6%
Bill is affordable	58%	53%	66%	50%	36%	61%	65%	52%	56%	63%	52%	85%	55%	48%	42%	74%	60%	66%	47%	60%
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%	2%	0%	2%	0%	0%	2%	0%	3%	0%	0%	0%	0%	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	121	17	53	50	22	51	48	27	43	51	33	13	74	25	24	19	15	38	17	104

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	92%	93%	90%	93%	98%	88%	93%	98%	88%	93%	98%	85%	91%	88%	97%	91%	97%	90%	96%	91%
I usually pay on time, but it can be difficult	5%	3%	6%	4%	2%	8%	3%	2%	7%	5%	2%	11%	5%	5%	3%	6%	0%	8%	4%	5%
I sometimes pay late depending on what other bills I have to pay	2%	0%	3%	1%	0%	2%	2%	0%	4%	1%	0%	0%	3%	5%	0%	3%	3%	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%	3%	1%	1%	0%	2%	1%	0%	1%	2%	0%	4%	1%	2%	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	237	30	114	90	52	96	89	45	83	109	52	27	151	41	36	35	38	87	27	210

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?

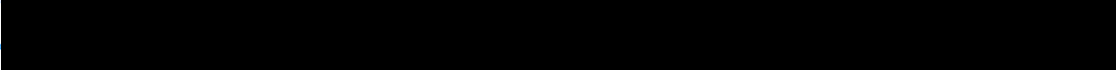
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Yes	6%	5%	6%	8%	7%	5%	7%	7%	9%	4%	6%	7%	6%	7%	10%	6%	7%	2%	13%	5%
No	93%	88%	94%	92%	93%	92%	93%	93%	91%	93%	94%	93%	94%	93%	90%	94%	93%	35%	87%	93%
Don't know/can't say	1%	7%	0%	0%	0%	3%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	37%	100%	100%
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	6%	0%	14%	0%	25%	0%	0%	0%	0%	20%	0%	0%	10%	0%	0%	0%	33%	0%	0%	8%
General enquiry	50%	100%	57%	29%	25%	60%	57%	33%	75%	20%	67%	0%	50%	33%	75%	50%	67%	25%	50%	50%
Request information	13%	0%	0%	29%	25%	0%	14%	33%	13%	0%	0%	0%	20%	33%	0%	0%	0%	25%	0%	17%
To report a problem	31%	0%	29%	43%	25%	40%	29%	33%	13%	60%	33%	100%	20%	33%	25%	50%	0%	50%	50%	25%
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	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	16	2	7	7	4	5	7	3	8	5	3	2	10	3	4	2	3	4	4	12

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	1%	0%	0%	1%	2%	0%	1%	0%	0%	2%	2%	0%	0%	0%	0%	0%	2%	0%	1%	
Unacceptable	18%	14%	23%	16%	24%	15%	19%	13%	17%	21%	13%	18%	21%	17%	18%	19%	24%	16%	7%	20%
Acceptable	76%	79%	73%	80%	71%	77%	78%	87%	80%	70%	83%	82%	75%	81%	77%	75%	71%	77%	93%	74%
Very acceptable	1%	0%	0%	1%	0%	2%	0%	0%	1%	1%	2%	0%	1%	0%	0%	0%	2%	1%	0%	1%
Don't know/can't say	4%	7%	4%	2%	4%	6%	2%	0%	2%	7%	0%	0%	4%	2%	5%	6%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227



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 for about one month every 71 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 493 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	62 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 99.4% of written complaints answered within 10 days. Customers generally satisfied with handling of telephone calls and no calls receive an 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 (or are at risk of) from low water levels caused by abstraction of water
		CURRENT AVERAGE WATER BILL = £121
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	365 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	2,276 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	130km of river of poor/bad quality, 790km of river at risk from weed growth that can be harmful to wildlife, 2 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £214
	CURRENT AVERAGE TOTAL BILL = £335	

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fairly poor value for money	10%	5%	13%	9%	15%	7%	10%	7%	10%	11%	6%	7%	12%	12%	5%	8%	19%	7%	0%	11%
Neither poor nor good value for money	16%	12%	18%	14%	25%	13%	13%	9%	17%	18%	17%	21%	14%	5%	13%	14%	17%	22%	13%	16%
Fairly good value for money	69%	74%	67%	70%	56%	70%	75%	76%	69%	67%	69%	71%	70%	76%	74%	75%	64%	63%	87%	67%
Very good value for money	2%	0%	1%	4%	2%	5%	0%	4%	3%	1%	6%	0%	1%	2%	5%	0%	0%	3%	0%	3%
Don't know/can't say	3%	9%	2%	2%	2%	6%	1%	4%	1%	4%	2%	0%	2%	5%	3%	3%	0%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

(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	3.66	3.77	3.57	3.72	3.46	3.77	3.66	3.81	3.66	3.60	3.76	3.64	3.63	3.73	3.82	3.69	3.45	3.65	3.87	3.63
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fairly poor value for money	12%	5%	13%	12%	18%	10%	10%	11%	12%	11%	12%	7%	12%	14%	10%	8%	19%	9%	0%	13%
Neither poor nor good value for money	15%	9%	18%	13%	22%	12%	13%	7%	17%	16%	12%	21%	14%	5%	13%	14%	17%	19%	13%	15%
Fairly good value for money	67%	74%	66%	67%	56%	69%	72%	76%	65%	66%	69%	71%	68%	71%	67%	75%	62%	65%	87%	65%
Very good value for money	3%	2%	2%	6%	2%	4%	3%	2%	4%	2%	6%	0%	3%	5%	8%	0%	2%	2%	0%	4%
Don't know/can't say	3%	9%	2%	2%	2%	6%	1%	4%	1%	4%	2%	0%	2%	5%	3%	3%	0%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

(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	3.64	3.82	3.57	3.67	3.43	3.71	3.69	3.72	3.63	3.62	3.71	3.64	3.63	3.70	3.74	3.69	3.48	3.63	3.87	3.61
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fairly poor value for money	10%	5%	12%	10%	13%	9%	9%	9%	10%	10%	10%	7%	10%	12%	8%	8%	17%	7%	0%	11%
Neither poor nor good value for money	18%	12%	21%	17%	25%	14%	18%	13%	17%	20%	17%	21%	17%	7%	15%	19%	19%	22%	13%	19%
Fairly good value for money	67%	74%	65%	68%	58%	68%	72%	71%	69%	65%	65%	71%	69%	74%	74%	69%	64%	62%	87%	65%
Very good value for money	2%	0%	1%	3%	2%	4%	0%	2%	3%	1%	6%	0%	1%	2%	0%	0%	0%	4%	0%	2%
Don't know/can't say	3%	9%	2%	2%	2%	6%	1%	4%	1%	4%	2%	0%	2%	5%	3%	3%	0%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

(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	3.63	3.77	3.56	3.66	3.50	3.71	3.64	3.70	3.66	3.59	3.69	3.64	3.61	3.70	3.68	3.63	3.48	3.66	3.87	3.60
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	8%	0%	14%	0%	0%	11%	11%	0%	0%	17%	0%	0%	12%	0%	0%	0%	29%	0%	0%	8%
Not worth the money	28%	0%	29%	33%	29%	56%	0%	50%	33%	17%	60%	50%	12%	60%	0%	33%	29%	14%	0%	28%
Too expensive already	60%	100%	50%	67%	57%	33%	89%	50%	67%	58%	40%	50%	71%	40%	100%	67%	29%	86%	0%	60%
Cannot afford it	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Oppose paying more to water companies when so much water is lost in leakage	4%	0%	7%	0%	14%	0%	0%	0%	0%	8%	0%	0%	6%	0%	0%	0%	14%	0%	0%	4%
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%	0%	100%
No of respondents	25	2	14	9	7	9	9	4	9	12	5	2	17	5	3	3	7	7	0	25

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	38%	56%	30%	38%	42%	35%	39%	42%	34%	38%	32%	30%	41%	44%	59%	28%	37%	29%	50%	36%
Service is worth the money	10%	3%	13%	9%	18%	12%	3%	9%	6%	12%	5%	5%	12%	0%	3%	16%	11%	14%	4%	11%
Bill is affordable	52%	41%	56%	53%	36%	53%	59%	48%	59%	48%	62%	65%	47%	56%	38%	56%	52%	55%	46%	53%
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	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%	1%	0%	3%	0%	0%	0%	0%	1%	0%	0%	0%	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	178	32	79	64	33	75	70	33	64	81	37	20	113	32	29	25	27	65	26	152

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 for about one month every 71 years	Maintain current service	£1	
	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	£1	
	Approximately 493 customer complaints to water company about the appearance, taste or smell of tap water each year	Fewer complaints about tap water	£0	
	62 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	
	100% 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 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 asset better protected from severe weather safeguarding service for 76,000 people	<50p	
	Fish and wildlife at 0 sites suffer (or are at risk of) from low water levels caused by abstraction of water	Maintain current service	£0	
	WATER BILL - FROM £121 IN 2010 TO £127 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	£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	£5	
	365 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 51 properties at risk of internal flooding from sewers at least once in ten years	£1	
	2,276 areas at risk of external flooding from sewers at least once in ten years	4,265 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	
	130km of river of poor/bad quality, 790km of river at risk from weed growth that can be harmful to wildlife, 2 bathing waters which do not meet minimum standards	An additional: 120km of river can better support fish and 50km can better support other wildlife: plus 6 wetlands and 0 lakes are restored and protected to support wildlife; plus 3 bathing waters are improved.	£8	
	SEWERAGE BILL - FROM £217 IN 2010 TO £222 IN 2014/5			£5
	TOTAL COMBINED BILL - FROM £338 IN 2010 TO £349 BY 2014/5			£11

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	*%	0%	1%	0%	2%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	2%	0%	0%	0%
Unacceptable	13%	9%	16%	11%	15%	10%	14%	4%	11%	17%	12%	14%	14%	12%	10%	17%	10%	14%	3%	14%
Acceptable	81%	81%	80%	81%	80%	80%	82%	96%	81%	76%	83%	86%	81%	83%	79%	78%	86%	80%	93%	79%
Very acceptable	2%	0%	0%	4%	0%	3%	1%	0%	4%	0%	6%	0%	1%	0%	3%	0%	2%	2%	0%	2%
Don't know/can't say	4%	9%	3%	3%	4%	7%	2%	0%	3%	7%	0%	0%	4%	5%	8%	6%	0%	4%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Improvements not worth the money	6%	0%	10%	0%	11%	9%	0%	0%	10%	5%	0%	25%	4%	0%	0%	0%	20%	7%	0%	6%
Too expensive already	68%	75%	60%	80%	56%	64%	79%	100%	80%	59%	67%	25%	74%	100%	50%	67%	40%	71%	0%	70%
Cannot afford it	15%	25%	20%	0%	0%	27%	14%	0%	0%	23%	0%	50%	13%	0%	25%	33%	0%	14%	100%	12%
Oppose paying more for a natural resource	3%	0%	0%	10%	11%	0%	0%	0%	10%	0%	17%	0%	0%	0%	25%	0%	0%	0%	0%	3%
Oppose paying more to companies who make large profits	6%	0%	5%	10%	11%	0%	7%	0%	0%	9%	17%	0%	4%	0%	0%	0%	20%	7%	0%	6%
Oppose paying more to water companies when so much water is lost in leakage	3%	0%	5%	0%	11%	0%	0%	0%	0%	5%	0%	0%	4%	0%	0%	0%	20%	0%	0%	3%
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	34	4	20	10	9	11	14	2	10	22	6	4	23	5	4	6	5	14	1	33

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

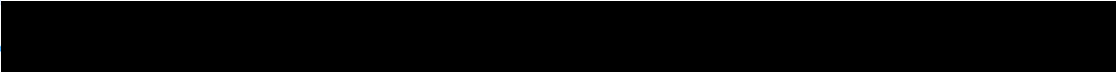
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
I value the improvements	27%	23%	26%	30%	32%	32%	19%	35%	20%	29%	28%	13%	30%	34%	34%	18%	22%	26%	25%	27%
Improvements are worth the money	5%	3%	5%	4%	7%	6%	2%	7%	4%	4%	2%	4%	5%	3%	0%	11%	5%	5%	0%	5%
Plan is affordable	68%	74%	69%	65%	61%	61%	79%	56%	76%	67%	70%	83%	64%	63%	66%	71%	73%	68%	75%	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	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%	1%	0%	1%	0%	2%	0%	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	212	35	96	77	44	87	81	43	76	93	46	24	132	35	32	28	37	80	28	184

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE 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	*%	0%	1%	0%	2%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	2%	0%	0%	0%
Unacceptable	13%	12%	15%	12%	18%	10%	14%	4%	13%	16%	10%	14%	15%	12%	10%	19%	10%	14%	3%	15%
Acceptable	82%	79%	81%	83%	76%	83%	84%	96%	82%	76%	87%	86%	81%	83%	82%	78%	86%	81%	93%	80%
Very acceptable	1%	0%	1%	1%	0%	2%	0%	0%	1%	1%	4%	0%	0%	0%	0%	0%	2%	1%	0%	1%
Don't know/can't say	4%	9%	3%	3%	4%	6%	2%	0%	3%	6%	0%	0%	4%	5%	8%	3%	0%	4%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE 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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Improvements not worth the money	14%	0%	11%	27%	27%	20%	0%	50%	25%	5%	40%	25%	8%	40%	0%	14%	20%	7%	0%	15%
Too expensive already	57%	60%	58%	55%	36%	50%	79%	50%	58%	57%	20%	25%	68%	60%	50%	57%	20%	71%	0%	59%
Cannot afford it	14%	20%	21%	0%	0%	30%	14%	0%	0%	24%	0%	50%	12%	0%	25%	29%	0%	14%	100%	12%
Oppose paying more for a natural resource	3%	0%	0%	9%	9%	0%	0%	0%	8%	0%	20%	0%	0%	0%	25%	0%	0%	0%	0%	3%
Oppose paying more to companies who make large profits	9%	20%	5%	9%	18%	0%	7%	0%	8%	10%	20%	0%	8%	0%	0%	0%	40%	7%	0%	9%
Oppose paying more to water companies when so much water is lost in leakage	3%	0%	5%	0%	9%	0%	0%	0%	0%	5%	0%	0%	4%	0%	0%	0%	20%	0%	0%	3%
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	35	5	19	11	11	10	14	2	12	21	5	4	25	5	4	7	5	14	1	34



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	25%	21%	23%	29%	26%	30%	19%	35%	18%	26%	30%	13%	27%	34%	34%	14%	16%	25%	25%	25%
Improvements are worth the money	5%	3%	7%	3%	5%	7%	4%	7%	3%	6%	0%	4%	7%	3%	0%	14%	5%	5%	0%	6%
Plan is affordable	69%	76%	69%	67%	69%	62%	78%	56%	80%	67%	70%	83%	66%	63%	66%	71%	78%	69%	75%	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	*%	0%	0%	1%	0%	1%	0%	2%	0%	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	212	34	98	76	42	89	81	43	74	95	47	24	131	35	32	28	37	80	28	184

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	1%	0%	2%	1%	2%	1%	1%	0%	0%	2%	4%	0%	1%	0%	0%	0%	5%	1%	0%	1%
Unacceptable	13%	12%	15%	12%	18%	10%	13%	7%	13%	15%	10%	14%	15%	14%	10%	19%	10%	13%	3%	15%
Acceptable	81%	79%	80%	82%	75%	82%	84%	93%	82%	76%	85%	82%	81%	81%	82%	78%	83%	81%	93%	79%
Very acceptable	1%	0%	1%	1%	2%	1%	0%	0%	1%	1%	2%	4%	0%	0%	0%	2%	1%	0%	0%	1%
Don't know/can't say	4%	9%	3%	3%	4%	6%	2%	0%	3%	6%	0%	0%	4%	5%	8%	3%	0%	4%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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%	5%	0%	0%	8%	0%	0%	0%	5%	14%	0%	0%	0%	0%	0%	17%	0%	0%	3%
Improvements not worth the money	11%	0%	10%	17%	27%	8%	0%	0%	25%	5%	14%	25%	8%	17%	0%	14%	17%	7%	0%	11%
Too expensive already	59%	60%	55%	67%	36%	58%	79%	100%	58%	55%	43%	25%	68%	83%	50%	57%	17%	71%	0%	61%
Cannot afford it	14%	20%	20%	0%	0%	25%	14%	0%	0%	23%	0%	50%	12%	0%	25%	29%	0%	14%	100%	11%
Oppose paying more for a natural resource	3%	0%	0%	8%	9%	0%	0%	0%	8%	0%	14%	0%	0%	0%	25%	0%	0%	0%	0%	3%
Oppose paying more to companies who make large profits	8%	20%	5%	8%	18%	0%	7%	0%	8%	9%	14%	0%	8%	0%	0%	0%	33%	7%	0%	8%
Oppose paying more to water companies when so much water is lost in leakage	3%	0%	5%	0%	9%	0%	0%	0%	0%	5%	0%	0%	4%	0%	0%	0%	17%	0%	0%	3%
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	37	5	20	12	11	12	14	3	12	22	7	4	25	6	4	7	6	14	1	36

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	25%	21%	24%	28%	26%	30%	19%	33%	16%	28%	24%	21%	27%	32%	34%	18%	14%	25%	25%	25%
Improvements are worth the money	5%	3%	6%	3%	7%	5%	4%	7%	4%	4%	2%	0%	6%	3%	0%	11%	6%	5%	0%	5%
Plan is affordable	70%	76%	70%	68%	67%	64%	78%	57%	80%	68%	73%	79%	66%	65%	66%	71%	81%	69%	75%	69%
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%	1%	0%	1%	0%	2%	0%	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	210	34	97	75	42	87	81	42	74	94	45	24	131	34	32	28	36	80	28	182

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%	5%	22%	31%	39%	2%	257
Ensure a reliable and continuous water supply	2%	4%	20%	33%	39%	2%	257
Ensure the safety of tap water – drinking water quality	2%	4%	19%	35%	39%	2%	257
Manage the appearance, taste and smell of tap water	2%	4%	18%	35%	40%	2%	257
Manage the pressure of water in your taps and the number of unplanned interruptions	2%	4%	19%	34%	40%	2%	257
Handle customers' accounts, queries, complaints and customers with special needs	2%	4%	18%	34%	41%	1%	257
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	2%	5%	19%	32%	40%	2%	257
Manage the amount of water taken from the environment to supply customers	2%	4%	18%	33%	42%	1%	257
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3%	6%	21%	28%	42%	1%	257
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	2%	5%	20%	31%	42%	1%	257
Avoid risk of homes being flooded with sewage	2%	4%	21%	30%	42%	1%	257
Avoid risk of properties being flooded with sewage outside the home	2%	4%	20%	31%	42%	1%	257
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	2%	5%	21%	28%	42%	1%	257
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	2%	5%	19%	30%	42%	1%	257
TOTAL	2%	5%	20%	32%	41%	1%	257

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	4.02	4.13	4.00	4.01	3.81	4.19	3.97	4.04	4.08	3.98	3.87	4.43	4.01	3.95	3.97	4.06	3.85	4.14	4.50	3.96
Ensure a reliable and continuous water supply	4.06	4.12	4.03	4.07	3.89	4.20	4.01	4.13	4.09	4.01	3.98	4.43	4.03	4.05	3.97	4.06	3.95	4.15	4.50	4.00
Ensure the safety of tap water – drinking water quality	4.08	4.15	4.04	4.08	3.95	4.20	4.02	4.16	4.09	4.03	4.00	4.43	4.04	4.05	4.00	4.06	3.98	4.17	4.50	4.02
Manage the appearance, taste and smell of tap water	4.09	4.12	4.06	4.12	3.98	4.21	4.04	4.18	4.09	4.07	4.02	4.43	4.06	4.07	4.03	4.06	3.98	4.20	4.53	4.04
Manage the pressure of water in your taps and the number of unplanned interruptions	4.09	4.10	4.06	4.13	4.00	4.18	4.04	4.23	4.09	4.04	4.04	4.39	4.07	4.13	4.05	4.06	3.95	4.16	4.53	4.03
Handle customers' accounts, queries, complaints and customers with special needs	4.09	4.10	4.06	4.12	4.02	4.17	4.04	4.20	4.11	4.03	4.02	4.43	4.08	4.05	4.08	4.08	4.00	4.15	4.53	4.03
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4.05	4.10	4.01	4.09	3.93	4.16	4.01	4.18	4.08	3.98	4.00	4.29	4.05	3.98	3.97	3.97	3.98	4.18	4.57	3.98
Manage the amount of water taken from the environment to supply customers	4.09	4.02	4.09	4.11	3.98	4.21	4.02	4.18	4.09	4.06	4.04	4.46	4.06	4.05	3.97	4.08	4.02	4.19	4.57	4.03
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4.00	3.98	4.00	4.03	3.89	4.14	3.92	4.13	4.03	3.93	3.94	4.36	3.98	3.95	4.00	4.00	3.81	4.11	4.57	3.93
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	4.07	4.05	4.05	4.10	3.91	4.19	4.02	4.18	4.08	4.02	4.02	4.43	4.04	4.00	4.05	4.11	3.90	4.15	4.57	4.00
Avoid risk of homes being flooded with sewage	4.07	4.05	4.06	4.10	3.93	4.19	4.02	4.18	4.09	4.02	4.00	4.43	4.06	4.00	4.08	4.11	3.90	4.15	4.57	4.00
Avoid risk of properties being flooded with sewage outside the home	4.08	4.05	4.08	4.10	3.95	4.21	4.01	4.18	4.09	4.03	4.00	4.43	4.06	4.02	4.05	4.11	3.93	4.17	4.57	4.01
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	4.04	4.00	4.04	4.07	3.89	4.20	3.96	4.18	4.02	4.01	3.98	4.39	4.02	4.00	3.95	4.06	3.90	4.16	4.57	3.97
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	4.07	4.05	4.07	4.09	3.91	4.20	4.02	4.20	4.07	4.02	3.98	4.43	4.06	4.08	4.05	4.08	3.88	4.15	4.57	4.00
TOTAL	4.07	4.07	4.05	4.09	3.93	4.19	4.01	4.17	4.08	4.02	3.99	4.41	4.04	4.03	4.02	4.06	3.93	4.16	4.55	4.00
No of respondents	257	40	119	89	54	102	96	45	87	120	52	28	159	41	39	35	41	96	30	222

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	5%	9%	5%	4%	5%	4%	7%	2%	7%	6%	4%	7%	5%	5%	0%	6%	0%	10%	3%	6%
Fairly poor value for money	7%	5%	8%	8%	9%	6%	7%	2%	8%	8%	6%	4%	8%	7%	10%	8%	12%	3%	0%	8%
Neither poor nor good value for money	27%	19%	33%	22%	40%	26%	22%	27%	22%	31%	27%	21%	28%	31%	21%	28%	26%	29%	20%	28%
Fairly good value for money	36%	30%	34%	40%	31%	38%	36%	44%	30%	37%	42%	32%	36%	36%	49%	33%	40%	30%	37%	36%
Very good value for money	24%	35%	20%	24%	15%	26%	27%	24%	31%	18%	21%	36%	22%	19%	21%	25%	21%	28%	40%	22%
Don't know/can't say	1%	2%	0%	1%	0%	1%	1%	0%	1%	1%	0%	0%	1%	2%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	6%	12%	5%	4%	5%	4%	8%	2%	7%	7%	4%	7%	6%	5%	3%	6%	0%	10%	3%	6%
Fairly poor value for money	7%	5%	8%	8%	9%	6%	7%	2%	8%	8%	6%	4%	8%	7%	10%	8%	12%	3%	0%	8%
Neither poor nor good value for money	28%	16%	34%	24%	38%	27%	24%	29%	25%	30%	31%	21%	28%	40%	21%	22%	26%	29%	20%	29%
Fairly good value for money	35%	30%	33%	39%	33%	37%	34%	42%	29%	37%	38%	32%	36%	29%	46%	39%	40%	30%	37%	35%
Very good value for money	24%	35%	20%	24%	15%	26%	27%	24%	31%	18%	21%	36%	22%	19%	21%	25%	21%	28%	40%	22%
Don't know/can't say	*%	2%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	5%	9%	5%	4%	5%	4%	7%	2%	7%	6%	4%	7%	5%	5%	0%	6%	0%	10%	3%	6%
Fairly poor value for money	8%	5%	8%	10%	9%	7%	8%	4%	8%	9%	8%	4%	9%	10%	10%	8%	12%	4%	0%	9%
Neither poor nor good value for money	27%	19%	35%	20%	40%	26%	22%	27%	24%	30%	25%	21%	29%	33%	18%	25%	29%	29%	20%	28%
Fairly good value for money	35%	30%	33%	41%	31%	37%	36%	42%	30%	37%	42%	32%	35%	33%	51%	36%	38%	29%	37%	35%
Very good value for money	24%	35%	20%	24%	15%	26%	27%	24%	31%	18%	21%	36%	22%	19%	21%	25%	21%	28%	40%	22%
Don't know/can't say	*%	2%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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	3.66	3.79	3.57	3.73	3.40	3.77	3.69	3.87	3.73	3.53	3.71	3.86	3.63	3.59	3.79	3.64	3.71	3.62	4.10	3.60
Total sewerage bill by 2014-15	3.64	3.74	3.56	3.71	3.42	3.76	3.64	3.84	3.71	3.52	3.67	3.86	3.61	3.50	3.72	3.69	3.71	3.62	4.10	3.58
Total combined bill by 2014-15	3.64	3.79	3.55	3.71	3.40	3.75	3.67	3.82	3.72	3.52	3.69	3.86	3.61	3.52	3.82	3.67	3.69	3.60	4.10	3.58
No of respondents	257	40	119	89	54	102	96	45	87	120	52	28	159	41	39	35	41	96	30	222

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	4%
Improve water appearance / colour / quality / taste	1%
Quicker response times	0%
Reduce number of leakages / increase repairs to pipes	2%
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	*%
Deal with the drainage problems/ flooding problems	1%
Give the option to install a water meter	*%
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	*%
Water is too chalky / hard water / lime scale problems	0%
Improve level of service / customer service / customer information	1%
Protect nature / wildlife / environment	*%
Reduce money wastage (unspecified source)	0%
More frequent meter readings	1%
Plan should already be in action / already doing things like this	0%
Other	1%
None	87%
Don't know	1%
Refused	0%
No of respondents	257

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

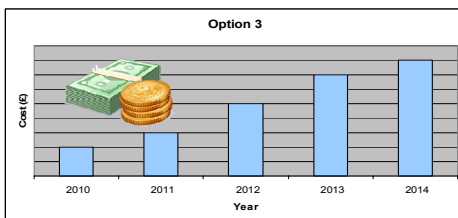
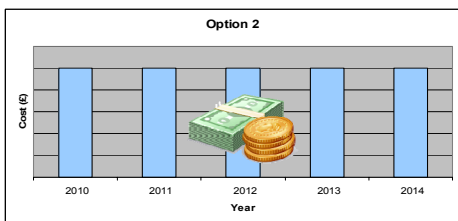
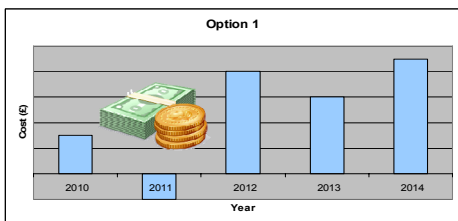
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

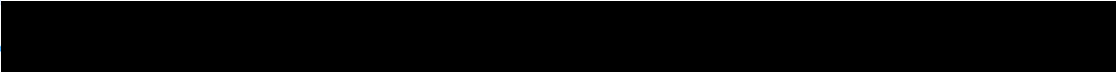
	Total	Age			SEG			Household size			Water meter?			Household Income (Gross, P.A.)					Location	
		18-29	30-59	60+	AB	C	DE	1	2	3+	Opted	Other	No	<10K	10-20K	20-30K	30K+	DK	Rural	Urban
Maintain water pipes, treatment works and reservoirs	27%	19%	28%	31%	24%	30%	26%	38%	22%	27%	31%	29%	25%	40%	3%	25%	31%	31%	23%	28%
Ensure a reliable and continuous water supply	70%	72%	68%	73%	60%	63%	84%	78%	65%	71%	71%	64%	70%	69%	72%	56%	62%	79%	70%	70%
Ensure the safety of tap water – drinking water quality	74%	86%	72%	74%	75%	79%	69%	76%	74%	74%	77%	79%	73%	62%	69%	67%	79%	83%	97%	71%
Manage the appearance, taste and smell of tap water	14%	12%	17%	12%	18%	14%	12%	13%	12%	16%	13%	18%	14%	17%	10%	19%	10%	15%	17%	14%
Manage the pressure of water in your taps and the number of unplanned interruptions	8%	12%	6%	9%	5%	11%	5%	16%	9%	4%	10%	4%	9%	17%	8%	6%	2%	7%	10%	7%
Handle customers' accounts, queries, complaints and customers with special needs	16%	12%	21%	10%	20%	15%	13%	13%	13%	18%	2%	18%	20%	14%	15%	19%	10%	17%	30%	14%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4%	2%	6%	3%	7%	4%	3%	7%	2%	5%	2%	4%	6%	2%	0%	14%	0%	5%	7%	4%
Manage the amount of water taken from the environment to supply customers	1%	2%	2%	0%	2%	2%	0%	2%	0%	2%	2%	0%	1%	0%	3%	3%	2%	0%	3%	1%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	1%	0%	2%	1%	0%	2%	1%	0%	1%	2%	2%	4%	1%	0%	5%	0%	0%	1%	0%	1%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	28%	42%	25%	26%	27%	23%	33%	22%	29%	28%	23%	43%	26%	14%	36%	28%	26%	31%	43%	26%
Avoid risk of homes being flooded with sewage	4%	2%	5%	3%	7%	3%	3%	2%	4%	4%	8%	4%	3%	2%	5%	3%	10%	2%	0%	4%
Avoid risk of properties being flooded with sewage outside the home	1%	0%	2%	0%	2%	1%	0%	0%	1%	1%	2%	4%	0%	0%	3%	0%	2%	0%	0%	1%
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	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227

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%	3%	0%	0%	3%	2%	0%	0%	4%	0%	4%	2%	2%	3%	3%	2%	1%	0%	2%
Bills show one big change in first year, then stay the same for the following four years	3%	7%	2%	3%	4%	4%	2%	2%	4%	2%	2%	4%	3%	0%	8%	3%	7%	1%	0%	4%
Bills change steadily every year, so that customers do not see big changes from year to year	95%	91%	95%	97%	96%	93%	96%	98%	96%	93%	98%	93%	94%	98%	90%	94%	90%	98%	100%	94%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	257	43	120	90	55	105	97	45	89	123	52	28	162	42	39	36	42	98	30	227





3.6 Other Company Information

GENDER

	Total
Male	53%
Female	47%
No of respondents	257

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	53%
Jointly responsible for household finances along with spouse/partner	40%
Contributor to shared household expenses (e.g. house/flatmate, parents)	4%
Payment through private rent	3%
Payment through Council rent/social housing	0%
Other	*%
Refused	0%
No of respondents	257

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	43%
Employed Part-time (9-29 hours)	7%
Retired	32%
Not working and not looking for work	8%
Student	5%
Not working and looking for work	4%
Other	0%
Refused	*%
No of respondents	257

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	2%
B	8%
C	5%
D	10%
E	10%
F	3%
G	1%
Don't know	61%
No of respondents	257

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	2%
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	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	*%
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	*%
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	1%
Other	2%
None	86%
Don't know	1%
Refused	0%
No of respondents	257

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

1. Key Findings

Welsh Water/Dŵr Cymru is a water and sewerage company billing 1,201,700 properties for water and 1,248,260 properties for sewerage services.

Uninformed Views of Current and Future Services

91% of customers stated that they were **satisfied** with the services provided by Welsh Water/Dŵr Cymru, whereas 3% 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 (53%), the water was good quality/clean (19%) and that it was good value for money (16%). The main reasons that customers were dissatisfied were that the service was poor/unreliable (20%) and a further 50% specifically stated that the water was poor/unreliable.

69% of customers stated that the current water and sewerage service was good **value for money**, the main reasons being that the bill was affordable (69%), they valued the service (18%) and the service was worth the money (13%). 11% 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). 93% felt that the overall company plan was **acceptable**, 7% felt that it was **unacceptable**, and 0% 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).

78% of customers stated that the current water service was **good value for money**, 78% stated the current sewerage service was good value for money, and 79% 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 (59%) and they valued the service (30%).

4% of customers stated that the current water service was **poor value for money**, 4% stated the current sewerage service was poor value for money, and 4% 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 that 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 3.79 for **water** services, 3.79 for **sewerage** services, and 3.78 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

94% of customers felt that Welsh Water/Dŵr Cymru's DBP and the impacts on their bill for **water** services was **acceptable**, the main reason being that the plan is affordable (74%).

5% of customers felt that Welsh Water/Dŵr Cymru's DBP and the impact on their bill for **water** services was **unacceptable**, the main reasons being that it was too expensive already (94%).

93% of customers felt that Welsh Water/Dŵr Cymru's DBP and the impacts on their bill for **sewerage** services were **acceptable**, the main reasons being that the plan is affordable (75%).

6% of customers felt that Welsh Water/Dŵr Cymru's DBP and the impacts on their bill for **sewerage** services were **unacceptable**, the main reasons being that it was too expensive already (83%).

93% of customers felt that Welsh Water/Dŵr Cymru's DBP as a whole and the impacts on their **overall** bill were **acceptable**, the main reason being that the plan is affordable (75%).

6% of customers felt that Welsh Water/Dŵr Cymru's DBP as a whole and the impacts on their **overall** bill were **unacceptable**, the main reasons 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 4.13 for **water** services, 4.14 for **sewerage** services, and 4.14 for services **overall**.

The proportion of customers rating the proposed DBP services as **good value for money** were 78% (water service), 78% (sewerage) and 79% (service overall). The proportion of customers rating the proposed DBP services as **poor value for money** were 6% (water service), 6% (sewerage service) and 6% (service overall).

Timing

57% of Welsh Water/Dŵr Cymru'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 39% would like to see bills show one big change in the first year, then stay the same for the following four years.

2. Introduction

The attitudes and preferences of Welsh Water/Dŵr Cymru's customers, reported in section 3, are based on a sample of 302. 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 company (Dee Valley Water) 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	98%	100%	99%	97%	98%	99%	99%	99%	98%	99%	100%	100%	98%	97%	100%	100%	95%	99%	96%	100%
Transport	97%	100%	95%	98%	94%	98%	95%	99%	97%	96%	97%	100%	96%	97%	95%	85%	91%	100%	93%	100%
Health Services	99%	100%	99%	99%	100%	99%	99%	100%	99%	99%	100%	100%	99%	100%	100%	100%	98%	99%	99%	99%
Crime Prevention	99%	100%	99%	98%	98%	99%	98%	100%	98%	99%	100%	100%	98%	100%	100%	100%	96%	99%	98%	99%
Environment	99%	100%	99%	98%	100%	99%	97%	99%	99%	99%	97%	97%	99%	93%	100%	100%	100%	99%	100%	98%
Cost of Living	98%	100%	98%	97%	96%	99%	98%	99%	99%	97%	100%	100%	97%	100%	100%	95%	98%	98%	96%	99%
Immigration	82%	97%	78%	83%	79%	85%	76%	86%	74%	84%	84%	87%	80%	79%	85%	58%	67%	89%	71%	91%
Water and Sewerage Services	99%	100%	99%	98%	98%	99%	99%	100%	97%	99%	100%	100%	98%	97%	100%	100%	98%	99%	97%	100%
Utility Services	97%	100%	98%	95%	98%	98%	95%	100%	96%	97%	100%	100%	97%	97%	100%	100%	96%	97%	96%	99%
TOTAL	96%	100%	96%	96%	96%	97%	95%	98%	95%	97%	98%	98%	96%	95%	98%	93%	93%	98%	94%	98%
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	16%	7%	15%	19%	19%	14%	17%	17%	16%	14%	13%	26%	15%	17%	5%	0%	16%	18%	11%	19%
Improving air quality	32%	30%	33%	31%	43%	31%	28%	21%	35%	35%	34%	23%	32%	28%	20%	40%	25%	35%	29%	34%
Reducing climate change	62%	73%	61%	59%	46%	64%	68%	64%	63%	59%	56%	55%	63%	76%	45%	40%	64%	63%	63%	61%
More activity on nature conservation etc	12%	10%	10%	14%	15%	10%	11%	11%	13%	11%	13%	13%	12%	21%	20%	15%	7%	10%	12%	11%
Reducing litter and household waste	33%	30%	34%	33%	30%	35%	31%	34%	31%	34%	41%	35%	32%	21%	40%	40%	31%	34%	28%	38%
Improvements to tackling flooding	15%	13%	12%	19%	9%	15%	16%	23%	12%	12%	13%	16%	15%	24%	10%	20%	16%	12%	13%	16%
Encouraging people to use less water	12%	20%	13%	8%	11%	12%	13%	10%	9%	15%	9%	16%	12%	7%	20%	15%	7%	13%	8%	16%
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	89%	93%	87%	90%	89%	89%	89%	89%	91%	87%	91%	90%	88%	79%	90%	80%	95%	89%	88%	89%
Removal and treatment of waste water	83%	93%	82%	82%	85%	82%	83%	87%	84%	81%	91%	84%	82%	66%	90%	75%	93%	84%	85%	83%
Dealing with sewer flooding	75%	80%	73%	78%	76%	75%	75%	80%	77%	72%	78%	87%	73%	66%	85%	65%	75%	78%	73%	78%
Maintaining pipes, treatment works, and other infrastructure	82%	90%	82%	81%	83%	83%	80%	83%	83%	81%	91%	71%	82%	72%	90%	70%	91%	81%	82%	83%
Protecting the water environment	76%	83%	75%	76%	80%	76%	73%	77%	78%	74%	84%	74%	74%	66%	100%	65%	73%	77%	70%	81%
Managing water pollution from agriculture and manufacturing	62%	63%	66%	54%	70%	62%	56%	60%	57%	65%	56%	55%	63%	48%	70%	60%	69%	61%	64%	59%
Drainage of roads	76%	83%	73%	80%	83%	70%	81%	83%	77%	72%	81%	77%	75%	76%	80%	70%	69%	79%	75%	77%
Reducing litter in waterways	74%	70%	73%	76%	78%	70%	78%	79%	74%	71%	81%	77%	72%	76%	90%	75%	80%	70%	72%	76%
Preventing flooding from rivers	69%	70%	69%	70%	74%	66%	72%	71%	74%	64%	78%	74%	67%	55%	100%	75%	80%	64%	70%	69%
Managing canal systems	56%	43%	59%	56%	63%	55%	53%	56%	56%	56%	66%	52%	55%	48%	70%	55%	62%	54%	63%	49%
Helping to reduce greenhouse gas emissions and tackle climate change	47%	37%	54%	40%	56%	46%	45%	44%	48%	49%	44%	52%	47%	41%	70%	50%	55%	43%	51%	44%
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	87%	87%	86%	88%	85%	87%	88%	90%	90%	83%	94%	81%	86%	83%	90%	80%	91%	87%	91%	83%
Removal and treatment of waste water	56%	60%	57%	54%	69%	53%	56%	60%	56%	54%	63%	68%	53%	48%	35%	55%	55%	60%	53%	59%
Dealing with sewer flooding	13%	20%	11%	15%	17%	11%	14%	16%	13%	12%	19%	10%	13%	17%	15%	25%	7%	13%	9%	17%
Maintaining pipes, treatment works, and other infrastructure	56%	53%	54%	62%	54%	55%	63%	59%	54%	57%	50%	65%	57%	55%	35%	45%	64%	58%	53%	59%
Protecting the water environment	26%	27%	26%	26%	19%	29%	25%	27%	26%	26%	25%	23%	26%	41%	25%	20%	31%	23%	20%	31%
Drainage of roads	11%	10%	13%	8%	6%	15%	7%	6%	10%	15%	3%	16%	12%	7%	15%	20%	4%	13%	8%	14%
Dealing with customer complaints & enquiries	20%	23%	17%	23%	17%	17%	25%	17%	21%	20%	16%	16%	20%	24%	15%	20%	20%	19%	20%	19%
Helping to reduce greenhouse gas emissions & tackle climate change	11%	17%	12%	6%	9%	15%	6%	9%	9%	14%	9%	13%	11%	10%	10%	15%	7%	12%	11%	11%
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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%	2%	1%	1%	0%	0%	2%	0%	0%	1%	7%	0%	0%	2%	0%	1%	1%
Fairly dissatisfied	2%	0%	3%	2%	2%	2%	3%	0%	5%	1%	0%	0%	3%	3%	5%	15%	2%	1%	4%	1%
Neither satisfied nor dissatisfied	6%	10%	6%	5%	4%	8%	6%	6%	7%	6%	13%	6%	6%	3%	10%	5%	2%	8%	2%	10%
Fairly satisfied	78%	87%	77%	77%	81%	75%	78%	86%	71%	78%	69%	68%	80%	62%	60%	70%	84%	81%	80%	76%
Very satisfied	13%	3%	13%	15%	11%	14%	11%	9%	16%	12%	19%	26%	10%	24%	25%	10%	11%	10%	13%	12%
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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Prices always increasing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Poor / unreliable - unspecified	20%	0%	29%	0%	0%	25%	25%	0%	40%	0%	0%	0%	11%	0%	100%	33%	0%	0%	29%	0%
Poor / unreliable - water	50%	0%	57%	33%	0%	75%	50%	0%	40%	60%	0%	0%	56%	67%	0%	67%	50%	0%	43%	67%
Poor / unreliable - sewerage	10%	0%	0%	33%	50%	0%	0%	0%	20%	0%	0%	0%	11%	0%	0%	0%	0%	100%	14%	0%
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	10%	0%	0%	33%	50%	0%	0%	0%	0%	20%	0%	0%	11%	0%	0%	0%	50%	0%	14%	0%
Don't know	10%	0%	14%	0%	0%	0%	25%	0%	0%	20%	0%	0%	11%	33%	0%	0%	0%	0%	0%	33%
TOTAL	100%	0%	100%	100%	100%	100%	100%	0%	100%	100%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	10	0	7	3	2	4	4	0	5	5	0	0	9	3	1	3	2	1	7	3

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	53%	37%	60%	47%	56%	53%	54%	47%	52%	57%	54%	59%	52%	52%	41%	69%	46%	55%	58%	48%
Good value for money	16%	26%	13%	18%	10%	17%	18%	15%	20%	14%	11%	17%	17%	28%	24%	13%	29%	10%	17%	16%
Water is good quality / clean	19%	19%	16%	24%	14%	20%	19%	21%	21%	18%	25%	7%	20%	8%	6%	13%	19%	23%	20%	19%
No flooding	*%	4%	0%	0%	0%	1%	0%	2%	0%	0%	0%	3%	0%	0%	0%	0%	0%	1%	1%	0%
No problems - unspecified	11%	15%	10%	11%	20%	9%	9%	14%	7%	11%	7%	14%	11%	12%	29%	6%	6%	10%	5%	16%
No problems - water	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
No problems - sewerage	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%	1%	0%	0%	0%	0%	2%	0%	0%	4%	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	273	27	152	94	50	138	79	66	82	125	28	29	212	25	17	16	52	163	132	141

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	97%	97%	95%	99%	100%	95%	97%	100%	96%	96%	97%	97%	97%	97%	95%	85%	96%	98%	94%	99%
Water and sewerage services in 2 separate bills	1%	0%	2%	1%	0%	1%	2%	0%	2%	1%	3%	3%	1%	3%	0%	5%	4%	0%	2%	1%
Don't know	2%	3%	3%	0%	0%	3%	1%	0%	2%	3%	0%	0%	2%	0%	5%	10%	0%	2%	4%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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

	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
£1 - £99	1%	6%	0%	0%	0%	1%	0%	0%	2%	0%	0%	0%	5%	0%	0%	0%	4%	0%	1%	0%
£100 - £199	7%	0%	4%	13%	6%	4%	9%	17%	3%	4%	39%	21%	1%	6%	0%	0%	4%	9%	7%	6%
£200 - £299	9%	0%	10%	11%	6%	11%	9%	21%	5%	6%	28%	26%	5%	18%	20%	20%	0%	8%	9%	9%
£300 - £399	28%	29%	30%	26%	27%	24%	37%	40%	25%	25%	11%	21%	32%	35%	33%	10%	21%	30%	28%	29%
£400 - £499	33%	18%	36%	32%	39%	33%	30%	14%	40%	37%	6%	16%	39%	35%	33%	50%	46%	27%	35%	31%
£500 - £599	9%	24%	7%	10%	18%	9%	6%	5%	8%	12%	6%	5%	10%	6%	13%	0%	7%	11%	7%	11%
£600 - £699	8%	18%	8%	5%	3%	11%	4%	2%	5%	12%	6%	5%	8%	0%	0%	10%	11%	9%	6%	9%
£700 - £799	4%	6%	4%	3%	0%	6%	2%	0%	8%	2%	6%	0%	4%	0%	0%	0%	7%	4%	5%	3%
£800 - £899	1%	0%	2%	0%	0%	0%	4%	0%	2%	1%	0%	0%	1%	0%	0%	10%	0%	1%	1%	1%
£900 - £999	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
£1000 +	1%	0%	1%	0%	0%	1%	0%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	1%	1%	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	183	17	104	62	33	93	54	42	60	81	18	19	145	17	15	10	28	113	86	97

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

	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
Not at all confident	1%	0%	1%	0%	0%	1%	0%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	1%	1%	0%
Not very confident	22%	12%	23%	23%	30%	18%	22%	24%	20%	22%	11%	21%	23%	29%	20%	70%	29%	15%	21%	23%
Fairly confident	71%	71%	70%	73%	61%	72%	76%	74%	72%	69%	78%	58%	72%	59%	73%	30%	61%	79%	67%	74%
Very confident	5%	12%	5%	5%	9%	6%	2%	2%	7%	6%	11%	16%	3%	12%	7%	0%	11%	4%	9%	2%
Don't know	1%	6%	1%	0%	0%	2%	0%	0%	0%	2%	0%	5%	1%	0%	0%	0%	0%	2%	1%	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	183	17	104	62	33	93	54	42	60	81	18	19	145	17	15	10	28	113	86	97

Q9. HOW DO YOU RATE YOUR CURRENT WATER & 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	1%	0%	1%	2%	3%	0%	2%	2%	0%	1%	0%	0%	1%	0%	0%	0%	4%	1%	1%	1%
Fairly poor value for money	10%	12%	10%	10%	6%	9%	15%	5%	18%	6%	0%	16%	10%	18%	27%	10%	0%	9%	7%	12%
Neither poor nor good value for money	19%	6%	18%	24%	15%	19%	20%	19%	20%	19%	17%	11%	21%	12%	7%	10%	18%	23%	16%	22%
Fairly good value for money	63%	82%	63%	58%	73%	63%	57%	67%	57%	67%	78%	58%	62%	65%	40%	70%	75%	63%	70%	58%
Very good value for money	6%	0%	8%	5%	0%	9%	6%	5%	5%	7%	6%	16%	5%	6%	20%	10%	4%	4%	6%	6%
Don't know	1%	0%	0%	2%	3%	0%	0%	2%	0%	0%	0%	0%	1%	0%	7%	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	183	17	104	62	33	93	54	42	60	81	18	19	145	17	15	10	28	113	86	97

Q10. MAIN REASON YOU FEEL YOUR CURRENT WATER & SEWERAGE SERVICES ARE 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	10%	0%	9%	14%	33%	0%	11%	0%	18%	0%	0%	0%	12%	0%	0%	100%	0%	9%	29%	0%
Not worth the money	15%	0%	18%	14%	33%	0%	22%	0%	18%	17%	0%	0%	18%	0%	50%	0%	100%	0%	29%	8%
Too expensive already	70%	100%	73%	57%	33%	100%	56%	100%	55%	83%	0%	100%	65%	100%	50%	0%	0%	82%	29%	92%
Cannot afford it	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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%
Only person living in property	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	5%	0%	0%	14%	0%	0%	11%	0%	9%	0%	0%	0%	6%	0%	0%	0%	0%	9%	14%	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%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	20	2	11	7	3	8	9	3	11	6	0	3	17	3	4	1	1	11	7	13

Q11. MAIN REASON YOU FEEL YOUR CURRENT WATER & SEWERAGE SERVICES OFFER 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	18%	14%	20%	15%	25%	19%	12%	17%	22%	17%	20%	29%	16%	25%	33%	13%	23%	14%	25%	11%
Service is worth the money	13%	7%	18%	5%	29%	10%	6%	7%	8%	18%	0%	36%	11%	0%	11%	25%	14%	13%	12%	13%
Bill is affordable	69%	79%	62%	79%	46%	70%	82%	77%	70%	65%	80%	36%	72%	75%	56%	63%	64%	72%	63%	76%
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	127	14	74	39	24	67	34	30	37	60	15	14	97	12	9	8	22	76	65	62

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	93%	92%	93%	94%	98%	93%	91%	86%	94%	96%	97%	87%	95%	89%	75%	83%	98%	96%	97%	90%
I usually pay on time, but it can be difficult	6%	0%	6%	6%	2%	5%	7%	12%	4%	3%	3%	13%	5%	11%	15%	17%	2%	4%	2%	9%
I sometimes pay late depending on what other bills I have to pay	*%	4%	0%	0%	0%	0%	1%	2%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	1%
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%	1%	0%	0%	1%	1%	0%	0%	1%	0%	5%	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	286	26	160	99	51	147	82	66	90	130	32	31	219	28	20	18	54	166	130	156

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	5%	0%	4%	8%	2%	6%	5%	4%	5%	4%	13%	3%	4%	3%	5%	15%	4%	2%	5%	4%
No	95%	100%	96%	92%	98%	94%	95%	96%	95%	96%	88%	97%	96%	97%	95%	85%	96%	10%	95%	96%
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%	11%	100%	100%
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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%	33%	25%	0%	33%	25%	0%	40%	33%	25%	100%	22%	0%	0%	67%	0%	29%	14%	43%
General enquiry	29%	0%	17%	38%	0%	33%	25%	67%	20%	17%	25%	0%	33%	0%	100%	0%	0%	43%	29%	29%
Request information	7%	0%	0%	13%	0%	0%	25%	0%	20%	0%	0%	0%	11%	0%	0%	0%	0%	14%	0%	14%
To report a problem	29%	0%	50%	13%	100%	22%	25%	0%	20%	50%	25%	0%	33%	0%	0%	33%	100%	14%	57%	0%
To obtain a water meter	7%	0%	0%	13%	0%	11%	0%	33%	0%	0%	25%	0%	0%	100%	0%	0%	0%	0%	0%	14%
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	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents / responses	14	0	6	8	1	9	4	3	5	6	4	1	9	1	1	3	2	7	7	7

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	1%	0%	1%	1%	2%	1%	0%	0%	0%	2%	0%	0%	1%	3%	0%	0%	2%	1%	1%	1%
Unacceptable	6%	0%	8%	3%	4%	6%	6%	3%	7%	6%	3%	3%	6%	0%	5%	10%	0%	8%	5%	6%
Acceptable	76%	77%	73%	82%	87%	75%	75%	81%	80%	72%	81%	87%	74%	76%	85%	70%	65%	80%	77%	76%
Very acceptable	17%	23%	17%	14%	7%	17%	19%	16%	13%	20%	16%	10%	18%	21%	10%	20%	33%	11%	15%	18%
Don't know/can't say	*%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	1%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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 every 20 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 14,682 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	220 properties at risk of low water pressure at the tap. Supplies to 3,518 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 99.2% 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 = £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	365 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	2,276 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	130km of river of poor/bad quality, 790km of river at risk from weed growth that can be harmful to wildlife, 2 bathing waters which do not meet minimum standards
		CURRENT AVERAGE SEWERAGE BILL = £214
	CURRENT AVERAGE TOTAL BILL = £372	

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%	1%	1%	2%	1%	0%	0%	0%	1%	0%	0%	1%	3%	0%	0%	2%	0%	1%	0%
Fairly poor value for money	3%	0%	4%	3%	2%	4%	2%	0%	7%	1%	0%	3%	3%	0%	5%	5%	2%	3%	4%	2%
Neither poor nor good value for money	18%	13%	17%	20%	17%	18%	19%	13%	23%	17%	16%	23%	18%	14%	20%	20%	16%	19%	15%	20%
Fairly good value for money	73%	87%	72%	72%	80%	71%	73%	83%	63%	75%	81%	65%	73%	72%	60%	70%	78%	74%	71%	75%
Very good value for money	5%	0%	7%	5%	0%	7%	6%	4%	6%	5%	3%	10%	5%	10%	15%	5%	2%	4%	8%	3%
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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

(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	3.79	3.87	3.80	3.76	3.74	3.80	3.82	3.91	3.68	3.81	3.88	3.81	3.79	3.86	3.85	3.75	3.76	3.79	3.80	3.79
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	1%	0%	1%	2%	4%	1%	0%	0%	1%	1%	0%	0%	1%	3%	0%	0%	2%	1%	2%	0%
Fairly poor value for money	3%	0%	4%	2%	0%	5%	2%	0%	7%	1%	3%	3%	3%	0%	5%	10%	2%	3%	4%	2%
Neither poor nor good value for money	18%	13%	17%	20%	19%	17%	19%	11%	23%	17%	13%	23%	18%	14%	15%	20%	18%	19%	16%	19%
Fairly good value for money	72%	83%	70%	72%	74%	71%	72%	84%	61%	73%	81%	65%	71%	72%	65%	70%	73%	72%	69%	74%
Very good value for money	6%	3%	8%	5%	4%	7%	7%	4%	7%	7%	3%	10%	6%	10%	15%	0%	5%	6%	8%	4%
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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

(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	3.79	3.90	3.80	3.75	3.74	3.79	3.83	3.93	3.66	3.82	3.84	3.81	3.79	3.86	3.90	3.60	3.78	3.80	3.77	3.81
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	1%	0%	1%	1%	2%	1%	0%	0%	0%	1%	0%	0%	1%	3%	0%	0%	2%	0%	1%	0%
Fairly poor value for money	3%	0%	4%	3%	2%	5%	2%	0%	9%	1%	3%	3%	3%	0%	5%	10%	2%	3%	5%	2%
Neither poor nor good value for money	18%	13%	17%	20%	17%	17%	19%	11%	23%	17%	13%	23%	18%	14%	15%	20%	16%	19%	15%	19%
Fairly good value for money	74%	87%	73%	72%	80%	72%	73%	84%	63%	76%	81%	65%	74%	72%	70%	70%	78%	74%	72%	76%
Very good value for money	5%	0%	5%	5%	0%	6%	6%	4%	5%	4%	3%	10%	4%	10%	10%	0%	2%	4%	6%	3%
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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

(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	3.78	3.87	3.79	3.76	3.74	3.78	3.82	3.93	3.65	3.80	3.84	3.81	3.78	3.86	3.85	3.60	3.76	3.79	3.77	3.80
No of respondents	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	33%	0%	38%	25%	50%	25%	50%	0%	25%	50%	0%	0%	33%	100%	100%	50%	50%	0%	44%	0%
Too expensive already	58%	0%	63%	50%	0%	75%	50%	0%	63%	50%	100%	100%	56%	0%	0%	50%	50%	83%	44%	100%
Cannot afford it	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	8%	0%	0%	25%	50%	0%	0%	0%	13%	0%	0%	0%	11%	0%	0%	0%	0%	17%	11%	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%	0%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	12	0	8	4	2	8	2	0	8	4	1	1	9	1	1	2	2	6	9	3

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	30%	31%	33%	26%	26%	30%	36%	24%	27%	36%	26%	30%	31%	38%	38%	36%	16%	32%	35%	26%
Service is worth the money	9%	4%	11%	6%	23%	7%	4%	8%	6%	11%	0%	13%	10%	4%	0%	14%	9%	10%	9%	9%
Bill is affordable	59%	62%	54%	68%	51%	61%	59%	68%	64%	52%	74%	52%	58%	58%	63%	50%	73%	56%	53%	65%
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	1%	0%	2%	0%	0%	2%	0%	0%	2%	1%	0%	0%	1%	0%	0%	0%	0%	1%	2%	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	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%	0%	0%	1%	0%	0%	2%	0%	0%	4%	0%	0%	0%	0%	2%	0%	1%	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	237	26	133	78	43	120	69	62	64	111	27	23	183	24	16	14	44	139	111	126

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 every 20 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	£7	
	Approximately 14,682 customer complaints to water company about the appearance, taste or smell of tap water each year	Reduce complaints about tap water to 3000	£0	
	220 properties at risk of low water pressure at the tap. Supplies to 3,518 properties affected by unplanned interruptions lasting more than 12 hrs	Reduce to 154 the number of properties at risk of low water pressure. Reduce properties affected by unplanned interruptions to 93	£0	
	100% of billing enquiries answered within 5 days and 99.2% 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	15 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 £159 IN 2010 TO £152 IN 2014/5			-£7
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	£5	
	365 properties at risk of internal flooding from sewers at least once in ten years	Reduce to 51 properties at risk of internal flooding from sewers at least once in ten years	£1	
	2,276 areas at risk of external flooding from sewers at least once in ten years	4,265 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	
	130km of river of poor/bad quality, 790km of river at risk from weed growth that can be harmful to wildlife, 2 bathing waters which do not meet minimum standards	An additional: 120km of river can better support fish and 50km can better support other wildlife: plus 6 wetlands and 0 lakes are restored and protected to support wildlife; plus 3 bathing waters are improved.	£8	
	SEWERAGE BILL - FROM £217 IN 2010 TO £222 IN 2014/5			£5
	TOTAL COMBINED BILL - FROM £376 IN 2010 TO £373 BY 2014/5			-£2

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Unacceptable	5%	0%	8%	3%	2%	6%	6%	1%	7%	6%	0%	10%	6%	3%	5%	10%	2%	6%	4%	7%
Acceptable	90%	100%	86%	93%	94%	89%	90%	93%	86%	91%	88%	90%	90%	97%	80%	85%	89%	91%	88%	92%
Very acceptable	4%	0%	6%	3%	2%	5%	5%	6%	6%	2%	13%	0%	4%	0%	15%	5%	7%	3%	8%	1%
Don't know/can't say	*%	0%	0%	1%	2%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	2%	0%	1%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Improvements not worth the money	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Too expensive already	94%	0%	92%	100%	100%	90%	100%	100%	100%	88%	0%	100%	92%	100%	100%	50%	100%	100%	80%	100%
Cannot afford it	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	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%	10%	0%	0%	0%	13%	0%	0%	8%	0%	0%	50%	0%	0%	20%	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%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	16	0	13	3	1	10	5	1	7	8	0	3	13	1	1	2	1	11	5	11

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	15%	17%	15%	13%	21%	14%	13%	12%	18%	14%	16%	18%	15%	25%	37%	17%	9%	12%	21%	9%
Improvements are worth the money	10%	0%	13%	7%	4%	13%	10%	10%	6%	13%	13%	4%	11%	14%	5%	28%	6%	10%	8%	12%
Plan is affordable	74%	80%	71%	80%	73%	72%	77%	78%	76%	71%	72%	75%	74%	61%	58%	56%	85%	77%	71%	78%
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	*%	3%	0%	0%	2%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	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	*%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	4%	0%	0%	0%	0%	0%	1%	1%	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	285	30	156	98	52	144	83	69	87	129	32	28	220	28	19	18	53	167	136	149

Q22. [INFORMED VIEW] HOW ACCEPTABLE DO YOU CONSIDER YOUR COMPANY'S PROPOSED PLAN FOR SEWERAGE SERVICES AND THE IMPACTS ON YOUR SEWERAGE 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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Unacceptable	6%	0%	8%	3%	4%	8%	5%	1%	7%	7%	0%	10%	6%	3%	5%	10%	2%	7%	4%	8%
Acceptable	89%	100%	86%	91%	93%	87%	90%	93%	88%	88%	94%	84%	89%	93%	80%	85%	91%	89%	87%	91%
Very acceptable	4%	0%	5%	5%	2%	5%	6%	6%	4%	4%	6%	3%	4%	3%	15%	5%	5%	3%	8%	1%
Don't know/can't say	1%	0%	1%	1%	2%	1%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	2%	1%	1%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

Q23. WHAT IS THE MAIN REASON THAT YOU FEEL THE PROPOSED PLAN FOR SEWERAGE 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	11%	0%	0%	33%	50%	8%	0%	0%	14%	10%	0%	0%	13%	0%	0%	0%	0%	15%	17%	8%
Improvements not worth the money	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Too expensive already	83%	0%	93%	67%	50%	83%	100%	100%	86%	80%	0%	100%	80%	100%	100%	50%	100%	85%	67%	92%
Cannot afford it	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	6%	0%	7%	0%	0%	8%	0%	0%	0%	10%	0%	0%	7%	0%	0%	50%	0%	0%	17%	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%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	18	0	14	3	2	12	4	1	7	10	0	3	15	1	1	2	1	13	6	12

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%	13%	16%	12%	22%	13%	14%	12%	17%	14%	16%	19%	14%	25%	32%	17%	9%	12%	20%	9%
Improvements are worth the money	10%	3%	14%	7%	4%	13%	10%	10%	7%	13%	13%	4%	11%	14%	11%	28%	6%	9%	8%	12%
Plan is affordable	75%	83%	70%	80%	75%	74%	75%	78%	75%	73%	72%	78%	74%	61%	58%	56%	85%	78%	71%	78%
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	*%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%	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	282	30	154	98	51	141	84	69	87	126	32	27	218	28	19	18	53	164	134	148

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	*%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%
Unacceptable	6%	0%	8%	3%	4%	7%	5%	1%	7%	7%	0%	10%	6%	3%	5%	10%	2%	7%	4%	7%
Acceptable	89%	100%	86%	92%	93%	88%	90%	93%	88%	88%	94%	84%	89%	97%	80%	85%	91%	89%	87%	91%
Very acceptable	4%	0%	5%	4%	2%	4%	6%	6%	4%	3%	6%	3%	4%	0%	15%	5%	5%	3%	7%	1%
Don't know/can't say	1%	0%	1%	1%	2%	1%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	2%	1%	1%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	11%	0%	0%	33%	50%	8%	0%	0%	14%	10%	0%	0%	13%	0%	0%	0%	0%	15%	17%	8%
Improvements not worth the money	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Too expensive already	83%	0%	93%	67%	50%	83%	100%	100%	86%	80%	0%	100%	80%	100%	100%	50%	100%	85%	67%	92%
Cannot afford it	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
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	6%	0%	7%	0%	0%	8%	0%	0%	0%	10%	0%	0%	7%	0%	0%	50%	0%	0%	17%	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%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	18	0	14	3	2	12	4	1	7	10	0	3	15	1	1	2	1	13	6	12

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%	13%	18%	12%	22%	14%	14%	12%	18%	15%	16%	19%	15%	25%	37%	17%	9%	13%	21%	10%
Improvements are worth the money	10%	3%	12%	7%	4%	12%	10%	10%	6%	12%	13%	4%	10%	14%	5%	28%	6%	9%	7%	11%
Plan is affordable	75%	83%	70%	80%	75%	74%	75%	78%	75%	73%	72%	78%	74%	61%	58%	56%	85%	78%	71%	78%
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%	1%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	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	282	30	154	98	51	141	84	69	87	126	32	27	218	28	19	18	53	164	134	148

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%	1%	10%	26%	60%	*%	302
Ensure a reliable and continuous water supply	3%	1%	5%	28%	62%	*%	302
Ensure the safety of tap water – drinking water quality	3%	1%	5%	27%	63%	*%	302
Manage the appearance, taste and smell of tap water	3%	1%	5%	29%	62%	*%	302
Manage the pressure of water in your taps and the number of unplanned interruptions	3%	1%	5%	29%	61%	*%	302
Handle customers' accounts, queries, complaints and customers with special needs	3%	1%	7%	28%	61%	0%	302
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	3%	1%	6%	30%	59%	0%	302
Manage the amount of water taken from the environment to supply customers	3%	1%	6%	28%	61%	0%	302
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4%	1%	6%	29%	60%	0%	302
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	3%	1%	4%	27%	64%	0%	302
Avoid risk of homes being flooded with sewage	3%	1%	5%	29%	62%	0%	302
Avoid risk of properties being flooded with sewage outside the home	3%	1%	6%	27%	62%	0%	302
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	3%	1%	5%	28%	62%	0%	302
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	3%	1%	4%	29%	62%	0%	302
TOTAL	3%	1%	6%	28%	61%	0%	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	4.40	4.73	4.30	4.46	4.35	4.37	4.44	4.59	4.23	4.41	4.47	4.60	4.36	4.48	4.45	4.40	4.38	4.38	4.35	4.43
Ensure a reliable and continuous water supply	4.46	4.73	4.34	4.56	4.35	4.44	4.51	4.63	4.32	4.46	4.53	4.67	4.42	4.59	4.40	4.50	4.42	4.45	4.39	4.51
Ensure the safety of tap water – drinking water quality	4.47	4.77	4.36	4.55	4.41	4.44	4.52	4.66	4.31	4.48	4.59	4.60	4.44	4.55	4.45	4.55	4.42	4.46	4.42	4.51
Manage the appearance, taste and smell of tap water	4.46	4.73	4.36	4.54	4.39	4.44	4.51	4.66	4.28	4.48	4.56	4.60	4.43	4.55	4.40	4.50	4.42	4.46	4.40	4.51
Manage the pressure of water in your taps and the number of unplanned interruptions	4.44	4.77	4.34	4.49	4.41	4.44	4.41	4.60	4.32	4.43	4.63	4.60	4.39	4.45	4.45	4.30	4.45	4.44	4.35	4.51
Handle customers' accounts, queries, complaints and customers with special needs	4.41	4.77	4.30	4.51	4.35	4.41	4.42	4.64	4.26	4.40	4.59	4.61	4.36	4.55	4.45	4.30	4.44	4.39	4.35	4.47
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	4.41	4.77	4.31	4.47	4.30	4.42	4.44	4.60	4.22	4.45	4.53	4.48	4.39	4.48	4.35	4.45	4.38	4.42	4.36	4.46
Manage the amount of water taken from the environment to supply customers	4.43	4.77	4.32	4.52	4.33	4.44	4.47	4.63	4.26	4.46	4.59	4.48	4.41	4.48	4.40	4.45	4.44	4.43	4.38	4.48
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4.41	4.73	4.30	4.49	4.33	4.39	4.45	4.64	4.21	4.42	4.56	4.58	4.37	4.52	4.35	4.45	4.42	4.39	4.32	4.49
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	4.47	4.77	4.38	4.52	4.39	4.46	4.50	4.67	4.28	4.49	4.59	4.65	4.43	4.55	4.45	4.55	4.47	4.44	4.41	4.52
Avoid risk of homes being flooded with sewage	4.45	4.73	4.34	4.54	4.37	4.44	4.48	4.63	4.29	4.46	4.59	4.65	4.41	4.59	4.35	4.35	4.49	4.43	4.39	4.50
Avoid risk of properties being flooded with sewage outside the home	4.43	4.70	4.34	4.50	4.33	4.42	4.49	4.66	4.21	4.47	4.56	4.61	4.40	4.52	4.40	4.45	4.44	4.42	4.37	4.49
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	4.44	4.70	4.34	4.52	4.33	4.44	4.47	4.64	4.28	4.44	4.50	4.61	4.41	4.48	4.35	4.30	4.49	4.44	4.39	4.48
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	4.45	4.77	4.36	4.51	4.37	4.47	4.45	4.64	4.30	4.46	4.56	4.61	4.42	4.45	4.40	4.45	4.49	4.45	4.39	4.51
TOTAL	4.44	4.75	4.33	4.51	4.36	4.43	4.47	4.63	4.27	4.45	4.56	4.60	4.40	4.52	4.40	4.43	4.44	4.43	4.38	4.49
No of respondents	302	30	168	102	54	153	88	70	94	137	32	30	234	29	20	20	55	177	141	160

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%	0%	5%	1%	4%	5%	1%	0%	4%	4%	0%	0%	4%	0%	0%	0%	2%	5%	3%	4%
Fairly poor value for money	3%	3%	2%	3%	4%	3%	2%	0%	4%	3%	0%	3%	3%	3%	0%	5%	2%	3%	4%	2%
Neither poor nor good value for money	16%	10%	19%	14%	9%	18%	19%	13%	18%	17%	9%	13%	18%	28%	20%	15%	20%	13%	18%	14%
Fairly good value for money	33%	20%	36%	32%	46%	30%	31%	33%	34%	32%	38%	35%	32%	24%	50%	50%	27%	32%	33%	33%
Very good value for money	45%	67%	38%	50%	37%	45%	47%	54%	39%	43%	53%	45%	43%	45%	30%	30%	49%	47%	42%	48%
Don't know/can't say	*%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	0%	1%	1%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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%	0%	5%	1%	4%	5%	1%	0%	4%	4%	0%	0%	4%	0%	0%	0%	2%	5%	3%	4%
Fairly poor value for money	3%	3%	2%	3%	4%	3%	2%	0%	4%	3%	0%	3%	3%	3%	0%	5%	2%	3%	4%	2%
Neither poor nor good value for money	15%	10%	17%	14%	9%	16%	19%	13%	16%	16%	9%	13%	17%	28%	20%	15%	15%	13%	16%	14%
Fairly good value for money	34%	20%	37%	33%	46%	32%	32%	34%	36%	33%	38%	35%	34%	24%	50%	50%	33%	33%	36%	33%
Very good value for money	44%	67%	38%	49%	37%	45%	45%	53%	39%	43%	53%	45%	43%	45%	30%	30%	49%	46%	41%	48%
Don't know/can't say	*%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	0%	1%	1%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	4%	0%	5%	1%	4%	5%	1%	0%	4%	5%	0%	0%	5%	3%	0%	0%	2%	5%	4%	4%
Fairly poor value for money	2%	3%	2%	3%	4%	2%	2%	0%	4%	2%	0%	3%	2%	0%	0%	5%	2%	3%	3%	2%
Neither poor nor good value for money	15%	10%	17%	13%	6%	16%	18%	11%	15%	16%	3%	13%	17%	24%	20%	15%	13%	13%	15%	14%
Fairly good value for money	35%	20%	38%	34%	50%	31%	33%	36%	37%	33%	44%	35%	34%	28%	50%	50%	35%	33%	37%	33%
Very good value for money	44%	67%	38%	49%	37%	45%	45%	53%	39%	43%	53%	45%	43%	45%	30%	30%	49%	46%	41%	48%
Don't know/can't say	*%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	0%	1%	1%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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	4.13	4.50	4.00	4.27	4.09	4.08	4.19	4.41	4.00	4.08	4.44	4.27	4.07	4.10	4.10	4.05	4.20	4.13	4.08	4.18
Total sewerage bill by 2014-15	4.14	4.50	4.02	4.26	4.09	4.10	4.18	4.40	4.02	4.09	4.44	4.27	4.08	4.10	4.10	4.05	4.25	4.12	4.09	4.18
Total combined bill by 2014-15	4.14	4.50	4.02	4.27	4.13	4.09	4.19	4.41	4.03	4.08	4.50	4.27	4.08	4.10	4.10	4.05	4.27	4.12	4.10	4.18
No of respondents	302	30	168	102	54	153	88	70	94	137	32	30	234	29	20	20	55	177	141	160

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	1%
Improve water appearance / colour / quality / taste	1%
Quicker response times	*%
Reduce number of leakages / increase repairs to pipes	0%
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	1%
Give the option to install a water meter	*%
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	*%
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	2%
None	94%
Don't know	0%
Refused	0%
No of respondents	302

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

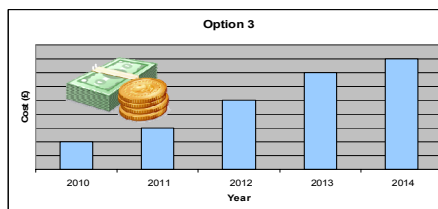
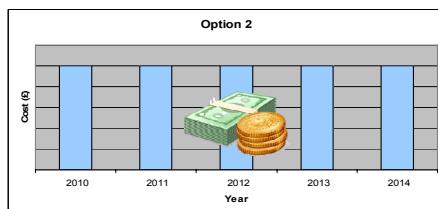
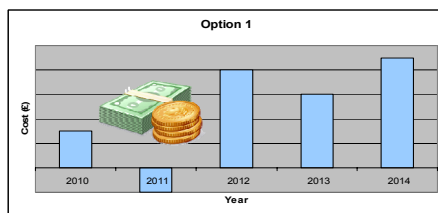
Q30. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?
(multiple response question)

	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	31%	47%	28%	31%	15%	34%	34%	33%	33%	28%	19%	32%	32%	31%	20%	30%	44%	28%	32%	30%
Ensure a reliable and continuous water supply	85%	87%	80%	91%	78%	84%	90%	91%	83%	83%	94%	77%	84%	86%	70%	80%	91%	85%	82%	88%
Ensure the safety of tap water – drinking water quality	75%	67%	77%	75%	74%	73%	78%	70%	73%	79%	75%	74%	75%	69%	75%	55%	73%	79%	74%	76%
Manage the appearance, taste and smell of tap water	19%	13%	20%	19%	17%	21%	18%	14%	21%	20%	13%	32%	18%	21%	10%	30%	24%	17%	21%	17%
Manage the pressure of water in your taps and the number of unplanned interruptions	8%	3%	9%	8%	13%	6%	7%	7%	6%	9%	6%	10%	8%	14%	0%	20%	2%	8%	8%	8%
Handle customers' accounts, queries, complaints and customers with special needs	19%	27%	18%	19%	15%	18%	20%	23%	16%	20%	13%	26%	19%	31%	15%	20%	18%	18%	11%	26%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	5%	7%	6%	3%	7%	5%	5%	3%	3%	7%	6%	3%	5%	7%	0%	10%	0%	6%	4%	6%
Manage the amount of water taken from the environment to supply customers	3%	7%	2%	2%	2%	3%	3%	3%	5%	1%	0%	6%	2%	3%	10%	5%	2%	2%	2%	3%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	1%	0%	1%	1%	4%	1%	0%	1%	2%	0%	0%	0%	1%	0%	5%	0%	2%	1%	0%	2%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	32%	37%	31%	33%	44%	34%	24%	33%	28%	36%	44%	32%	31%	14%	45%	10%	9%	44%	24%	40%
Avoid risk of homes being flooded with sewage	4%	0%	3%	6%	6%	2%	6%	4%	5%	2%	3%	0%	4%	10%	5%	5%	9%	1%	6%	1%
Avoid risk of properties being flooded with sewage outside the home	1%	0%	2%	0%	2%	1%	0%	0%	2%	1%	3%	0%	1%	0%	0%	0%	5%	0%	2%	0%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	*%	0%	1%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	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	302	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160

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%	2%	7%	6%	3%	5%	3%	5%	3%	0%	3%	4%	7%	0%	5%	2%	4%	5%	3%
Bills show one big change in first year, then stay the same for the following four years	39%	47%	40%	36%	31%	43%	35%	41%	33%	42%	47%	35%	39%	34%	30%	35%	44%	40%	37%	41%
Bills change steadily every year, so that customers do not see big changes from year to year	57%	50%	59%	57%	63%	55%	60%	56%	62%	55%	53%	61%	57%	59%	70%	60%	55%	56%	58%	56%
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	30	169	102	54	154	88	70	94	138	32	31	234	29	20	20	55	178	142	160



3.6 Other Company Information

GENDER

	Total
Male	52%
Female	48%
No of respondents	302

S1. TYPE OF BILL PAYER

	Total
Sole bill payer	47%
Jointly responsible for household finances along with spouse/partner	48%
Contributor to shared household expenses (e.g. house/flatmate, parents)	2%
Payment through private rent	2%
Payment through Council rent/social housing	1%
Other	0%
Refused	0%
No of respondents	302

S2. EMPLOYMENT STATUS

	Total
Employed Full-time (30+ hours)	46%
Employed Part-time (9-29 hours)	5%
Retired	35%
Not working and not looking for work	7%
Student	1%
Not working and looking for work	5%
Other	0%
Refused	0%
No of respondents	302

Q37. CATEGORY BAND FOR COUNCIL TAX

	Total
A	2%
B	6%
C	14%
D	13%
E	7%
F	5%
G	1%
Don't know	52%
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	0%
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	0%
Have difficulty paying water bill with limited income / pension	0%
Breakdown of billing / justifying high cost of water	*%
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	*%
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	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)

	Welsh Water/Dŵr Cymru	Dee Valley Water
Education	98%	89%
Transport	97%	88%
Health Services	99%	89%
Crime Prevention	99%	90%
Environment	99%	89%
Cost of Living	98%	90%
Immigration	82%	75%
Water and Sewerage Services	99%	88%
Utility Services	97%	89%
TOTAL	96%	88%
No of respondents	302	256

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Protecting the water environment	16%	32%
Improving air quality	32%	32%
Reducing climate change	62%	53%
More activity on nature conservation etc	12%	11%
Reducing litter and household waste	33%	26%
Improvements to tackling flooding	15%	15%
Encouraging people to use less water	12%	7%
No of respondents	302	257

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

(multiple response question)

	Welsh Water/Dŵr Cymru	Dee Valley Water
Providing safe, reliable, clean drinking water	87%	76%
Removal and treatment of waste water	56%	54%
Dealing with sewer flooding	13%	15%
Maintaining pipes, treatment works, and other infrastructure	56%	47%
Protecting the water environment	26%	21%
Drainage of roads	11%	12%
Dealing with customer complaints & enquiries	20%	17%
Helping to reduce greenhouse gas emissions & tackle climate change	11%	11%
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
£1 - £99	1%	4%
£100 - £199	7%	13%
£200 - £299	9%	17%
£300 - £399	28%	27%
£400 - £499	33%	24%
£500 - £599	9%	5%
£600 - £699	8%	4%
£700 - £799	4%	2%
£800 - £899	1%	1%
£900 - £999	0%	1%
£1000 +	1%	1%
TOTAL	100%	100%
No of respondents	183	164

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Not at all confident	1%	1%
Not very confident	22%	18%
Fairly confident	71%	71%
Very confident	5%	6%
Don't know	1%	4%
TOTAL	100%	100%
No of respondents	183	164

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Completely unacceptable	1%	1%
Unacceptable	6%	18%
Acceptable	76%	76%
Very acceptable	17%	1%
Don't know/can't say	*%	4%
TOTAL	100%	100%
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	1%	0%
Fairly poor value for money	3%	12%
Neither poor nor good value for money	18%	15%
Fairly good value for money	72%	67%
Very good value for money	6%	3%
Don't know/can't say	0%	3%
TOTAL	100%	100%
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Mean value for money score	3.79	3.64
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Completely unacceptable	0%	*%
Unacceptable	6%	13%
Acceptable	89%	82%
Very acceptable	4%	1%
Don't know/can't say	1%	4%
TOTAL	100%	100%
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
I don't value the improvements	11%	0%
Improvements not worth the money	0%	14%
Too expensive already	83%	57%
Cannot afford it	0%	14%
Oppose paying so much for a natural resource	0%	3%
Oppose paying so much to companies who make large profits	0%	9%
Oppose paying more to water companies when so much water is lost in leakage	0%	3%
Other	6%	0%
Don't know/can't say	0%	0%
TOTAL	100%	100%
No of respondents	18	35

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
I value the improvements	15%	25%
Improvements are worth the money	10%	5%
Plan is affordable	75%	69%
Have no choice but to pay	0%	0%
Other	0%	0%
Don't know/can't say	*%	*%
TOTAL	100%	100%
No of respondents	282	212

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	4%	3%
Fairly poor value for money	1%	6%
Neither poor nor good value for money	6%	21%
Fairly good value for money	29%	28%
Very good value for money	60%	42%
Don't know/can't say	0%	1%
TOTAL	100%	100%
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	3%	2%
Fairly poor value for money	1%	5%
Neither poor nor good value for money	4%	20%
Fairly good value for money	27%	31%
Very good value for money	64%	42%
Don't know/can't say	0%	1%
TOTAL	100%	100%
No of respondents	302	257

Avoid risk of homes being flooded with sewage

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	3%	2%
Fairly poor value for money	1%	4%
Neither poor nor good value for money	5%	21%
Fairly good value for money	29%	30%
Very good value for money	62%	42%
Don't know/can't say	0%	1%
TOTAL	100%	100%
No of respondents	302	257

Avoid risk of properties being flooded with sewage outside the home

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	3%	2%
Fairly poor value for money	1%	4%
Neither poor nor good value for money	6%	20%
Fairly good value for money	27%	31%
Very good value for money	62%	42%
Don't know/can't say	0%	1%
TOTAL	100%	100%
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	3%	2%
Fairly poor value for money	1%	5%
Neither poor nor good value for money	5%	21%
Fairly good value for money	28%	28%
Very good value for money	62%	42%
Don't know/can't say	0%	1%
TOTAL	100%	100%
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	3%	2%
Fairly poor value for money	1%	5%
Neither poor nor good value for money	4%	19%
Fairly good value for money	29%	30%
Very good value for money	62%	42%
Don't know/can't say	0%	1%
TOTAL	100%	100%
No of respondents	302	257

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)

	Welsh Water/Dŵr Cymru	Dee Valley Water
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	4.41	4.00
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	4.47	4.07
Avoid risk of homes being flooded with sewage	4.45	4.07
Avoid risk of properties being flooded with sewage outside the home	4.43	4.08
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	4.44	4.04
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	4.45	4.07
No of respondents	302	257

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

	Welsh Water/Dŵr Cymru	Dee Valley Water
Very poor value for money	3%	6%
Fairly poor value for money	3%	7%
Neither poor nor good value for money	15%	28%
Fairly good value for money	34%	35%
Very good value for money	44%	24%
Don't know/can't say	*%	*%
TOTAL	100%	100%
No of respondents	302	257

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)

	Welsh Water/Dŵr Cymru	Dee Valley Water
Total sewerage bill by 2014-15	4.14	3.64
No of respondents	302	257

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