Understanding customers' views

PR09 Quantitative Research into Customers' Priorities – Overall Report

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

February 2009

bmg research

mvaconsultancy

Document Control

Project Title:	PR09 Quantitative Research into Customers' Priorities
MVA Project Number:	C37233
Document Type:	Final Report
Directory & File Name:	N:\Contracts\C37233_PR09_Ofwat\Reporting\Final Version Feb 2009\PR09 Overall Report_Final_Feb 2009.Doc

Document Approval

Primary Author:	Sue Falp
Other Author(s):	Paul Le Masurier
Reviewer(s):	Paul Le Masurier, Rhian Dent
Formatted by:	Leticia Rodriguez

Distribution

Issue	Date	Distribution	Comments
1	16/12/2008	Paul Le Masurier	Internal Draft for Review
2	17/12/2008	Ofwat	First external draft
3	19/12/2008	Ofwat	First external draft (superseded)
4	09/01/2009	Ofwat	Second external draft
5	22/01/2009	Ofwat	Third external draft
6	02/02/2009	Ofwat	Fourth external draft
7	13/02/2009	Ofwat	Fifth external draft - Final
8	16/02/2009	Ofwat	Sixth external draft – Final V1
9	24/02/2009	Ofwat	Final Version

Contents

mvaconsultancy

Figures

Appendices

1 Introduction

1.1 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 is 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 national 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 Customers' views on the acceptability, and value for money, of their company's proposed DBP was sought at an overall package level, and at a more detailed, component level (i.e. individual aspects of the plan such as, for example, maintaining unplanned interruption levels with a corresponding cost of +/-£X, or reducing the number of properties affected by low water pressure with a corresponding additional cost of +£Y). Though customer responses to their company's unique proposals must be, inevitably, obtained at a company level, there was also a need for an overall, national, assessment of customer views – especially on affordability, value for money and acceptability – to facilitate a consistent communications strategy for PR09.

1.1.5 Another crucial dimension that can affect customers' attitudes is the nature and timing of any bill level increases. Previous research[1] showed that paying customers prefer a stable bill level over one that fluctuates each year; or steady, small increases over irregular, large jumps in bill level; and bill-profiling needed to be further explored in the context of proposed service offerings for 2010 onwards.

1.1.6 The results will inform companies' final business plans, other stakeholders and ultimately Ofwat's final determination of price limits (to the extent that it is possible Ofwat's decisions will be informed by consumers' views on outputs such as customer service, bill levels and bill profiles).

1.2 The Steering Group

1.2.1 The members of the study Steering Group represented all main parties with a stake in the outcome of the process – i.e. government, the regulators, customers and water companies. Steering Group members are listed below.

Consumer Council for Water

The Consumer Council for Water (CCWater) represents the interests of consumers in the water industry. CCWater operates through four committees in England and a committee for Wales. CCWater came into operation on 1st October 2005.

Department for Environment, Food and Rural Affairs (Defra)

Defra has responsibility for policy on all aspects of water including water supply and resource and the regulatory system for the water environment and the water industry. Setting the overall policy framework lies, in England, with the Secretary of State for Environment, Food and Rural Affairs.

Drinking Water Inspectorate (DWI)

DWI is responsible for the regulation of drinking water quality in England and Wales ensuring water companies supply water that is clean and safe to drink and meets the standards set down in the national legislation, mainly the Water Supply (Water Quality) Regulations 2000 (2001 in Wales) (Amendment) Regulations 2007.

Environment Agency

The Environment Agency is a Non-Departmental Public Body and comes under the sponsorship of the Department for Environment Food and Rural Affairs (Defra) and the National Assembly for Wales (NAW). It is the leading public body for protecting and improving the environment in England and Wales. It's the Agency's job to make sure that air, land and water are looked after by everyone in today's society, so that tomorrow's generations inherit a cleaner, healthier world.

Natural England

The statutory body responsible for conservation and enhancement of the natural environment in England, including the wellbeing and enjoyment of people and the economic prosperity that it brings.

[1] "Customer Research 2003: Periodic Review – National Report", MVA Consultancy in association with WRc (2003)

Ofwat
Ofwat is the economic regulator of the monopoly water and sewerage companies in England and Wales. Ofwat protects consumers, promotes value and safeguards the future by:

- setting limits on what companies can charge their customers to support and encourage a sustainable water and sewerage sector;
- ensuring companies are able to carry out their responsibilities under the Water Industry Act 1991 as updated by section 39 of the Water Act 2003;
- protecting the standard of service customers receive;
- encouraging companies to be more efficient;
- meeting the principles of sustainable development; and
- promoting the development of competition.

Water and Sewerage Companies – represented by Water UK
Water UK is the industry association that represents all UK water and sewerage companies (these were appointed by the Secretary of State to provide water and sewerage services in England and Wales) at national and European level. It actively seeks to develop policy and improve understanding in areas that involve the water industry, its consumers and stakeholders.

Welsh Assembly Government
The Welsh Assembly Government is responsible for regulation of drinking water quality, environmental water quality, water resource management and water industry regulation. The Assembly Government sets out the overall policy framework and vision for the price review in Wales, and provides guidance on drinking water quality and environmental improvements as determined by Welsh Ministers.

1.2.2 The Steering Group has met on a regular basis with each member being given the opportunity to input into the development of the project. Ofwat acted as project manager on the Steering Group's behalf.

1.3 Business Objectives

1.3.1 To inform companies' final business plans and Ofwat decisions on price limits, through a collegiate approach, the research sought to:

- understand customers' views[2] on the acceptability and affordability of:

  a. each company's total integrated package of services and outputs as set out in their draft business plan.

  b. elements at a programme level within each overall plan such as maintaining existing service levels as well as improvements and new legal obligations.

[2] In fact, the focus of the research was subsequently agreed to be the views of a subset of all consumers – i.e. bill payers. The sample, therefore, does not necessarily represent the views of all users of water and sewerage services.

- understand customers' views on alternative company business plans if submitted[3] (this may address issues such as the phasing of particular improvements where this is a possibility).
- understand customers' views on the profile of bill changes for the period 2010-15 (for example bill increases could be smoothed).

1.4 Research Objectives

1.4.1 The specific research objectives were:

- to understand consumers' views of water and sewerage issues relative to other social issues such as health, immigration, education, transport and climate change and to other household bills.
- to explore consumers' understanding of the responsibilities of water and sewerage companies.
- through the provision of relevant informative stimulus material (to provide the context of the wider economy and society of the day, the current make-up of the water industry including roles and responsibilities and any pressures on the supply and demand of water and the sewerage infrastructure, including climate change as far as possible) the stakeholders wish to understand the following (bearing in mind the constraints of a quantitative survey):

  - to understand how important it is to consumers to maintain existing assets, environmental protection, drinking water quality, water resources management and customer service levels and their acceptance of price changes necessary to achieve this.

  - explore consumers' priorities for maintaining the current level of service and/or improving elements of service such as environmental protection, drinking water quality, preventing sewer flooding and activities that affect the supply and demand for water (for example the level of metering, water efficiency activity, and managing leakage[4]).

  - examine consumers' acceptance of price changes to achieve proposed service improvements.

  - establish if consumers are willing to see the pace of delivery changed in order to achieve different outcomes such as bringing forward the delivery of specific improvements, reducing the impact on bills or delivering a more sustainable solution.

- understand consumers' views on the value for money, the acceptability and the affordability (to them) of the companies' total package of services and benefits set out in the DBPs.
- understand consumers' preferences for the phasing of bill changes and establish what profile of possible bill changes consumers would prefer in the context of likely average

[3] in the event, none were.

[4] however, as the study progressed, it was agreed that Ofwat would consider the issue of leakage outside of this study

bill effects in their area over the five year period, and how concerned they would be if they could not have this profile.

- explore if the companies' DBPs have omitted any aspect of consumers' priorities on enhancement to services.
- to track changes in consumers' opinions from the previous price review, PR04, where feasible.

1.4.2 A large, national 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[5] in England and Wales.

1.4.3 The survey collected attitudinal information on current services and on proposed future water and sewerage services, as defined in each water company's DBP. Respondents were presented with information on current and proposed services using 'show cards' incorporating company specific information in a standardised format. The information was compiled by Ofwat and the other regulators and agreed by the companies. The cards included details of proposed changes to current service levels, and their effects on bills. The information presented to respondents showed proposals specific to the company or companies responsible for supplying water and sewerage services in their area.

1.4.4 Where a customer had separate suppliers for water and for sewerage they were shown the relevant elements of each company's plan together with the descriptions of each element of service, the associated outputs and bill effects of each as well as total water and sewerage bill effects separately and combined. Where this was the case both companies are named in this report. Usually, we have labelled the joint service providers by giving the WoC first, followed by the WaSC - for example, Cambridge/Anglian (where customers receive water services from the former and sewerage services from the latter). However, when we report about the views of the sewerage service, we have reversed the company names (e.g. Anglian/Cambridge) to reflect the fact that in the Cambridge water area the sewerage service is provided by Anglian Water.

[5] see section 2.4.

1.5 Content of Report

1.5.1 In the following chapter, we describe the survey methodology, covering our approach to sampling, questionnaire design, piloting, fieldwork, data processing and analysis.

1.5.2 Subsequent chapters provide the results and key findings across the companies at an overall level (all companies results aggregated), under a series of themes relating directly to the study objectives. For each theme, results are reported at the overall level (i.e. for England and Wales separately and combined) and variations at company level are highlighted. The themes are:

- customers' views on water and sewerage issues alongside wider social issues (Chapter Three);
- awareness/understanding of company(ies) responsibilities, customers' satisfaction and perceptions of value for money of the current service they receive (uninformed), their approach to paying their bills, contact with their water/water and sewerage company, and general overview of company's proposed service offering and the bill level and whether or not this would be acceptable (Chapter Four);
- customers' perceptions of value for money of the current service they receive (informed) (Chapter Five);
- customers' views on their companies' proposed service offering and the bill level (according to their DBP) this would involve, whether or not this would be acceptable and offers value for money, and service areas that would cause most concern if they were delayed (Chapter Six);
- customers' preferred bill profile (Chapter Seven).

1.5.3 A full account of current, and proposed future, services presented to customers of each water company is documented in a separate Company Report[6], along with the company results for each question and key findings.

[6] PR09 Quantitative Research into Customers' Priorities – Company Report (England), MVA Consultancy (February, 2009). PR09 Quantitative Research into Customers' Priorities – Company Report (Wales), MVA Consultancy (February, 2009)

2 Methodology

2.1 Research Design

2.1.1 In order to deliver the necessary level and depth of information, a large-scale quantitative survey was undertaken. The survey obtained the views of a representative sample (see 2.4.2 - 2.4.3 for sample detail) of customers in each of the Water Only Companies (12) and Water and Sewerage Companies (10) in England and Wales. The survey was administered face-to-face in respondents homes (using Computer Assisted Personal Interviewing- CAPI) due to the sensitive subject matter and the need for a considered view on the consequences of changes in a wide range of levels of service within the water industry.

2.2 Questionnaire Design

2.2.1 A key question that would affect the usability and success of the research was the extent to which we wanted to 'inform' the respondents prior to obtaining their views on the acceptability of DBPs. Previous deliberative research highlighted the importance of contextual information, and in essence, acceptance levels will vary according to the level of contextual information provided.

2.2.2 The lack of awareness/understanding amongst customers about the existing service and its impacts - and the potential for change, means that certain information was provided, consistently, for customers to make a sensible judgement. However, it was important not to lose sight of the fact that the more the researchers inform the respondent, the less representative we make our sample from the rest of the population that remain uninformed. The questionnaire was designed to elicit customers' views on the acceptability of their company's DBPs early on in the interview (when they had been given little information – and were therefore 'uninformed') and again later in the context of additional information. This allowed an insight into how a company's DBP might actually be received by its customers (as they will receive the bill with relatively limited information to explain the drivers for the changes in bills), and also how the plan was supported, or otherwise, if customers are more fully 'informed'.

2.2.3 A further consideration of the questionnaire design was the extent to which customers of a Water only Company (WoC) were asked to consider sewerage services that are outside the control of the WoC but may, nevertheless, impact considerably on their customers' acceptance of the WoC's DBP. It was important for customers to understand the wider pressures on their bill levels, when considering whether the water service proposals are acceptable to them. Otherwise, there is a risk that what, during the survey, seemed acceptable and value for money to customers turns out differently in reality if sewerage services, independently, increased bills considerably. Therefore, customers were first asked to consider the acceptability of their WoC's plans for water services; second, to consider the acceptability of their Water and Sewerage Company's (WaSC's) DBP in relation to sewerage services; and finally, to consider the overall package (water and sewerage).

2.2.4 Customer feed-back on proposed future water services and sewerage services separately, in this way, will enable stakeholders to isolate the impacts of the WoC and WaSC plans. However, it is likely that many WoCs have only obtained customer acceptance/willingness-to-pay values in the context of their plans only, so respondents will have provided their responses with the implicit assumption that there are unknown changes to bill-levels from their sewerage service provider.

Pilot Surveys

2.2.5 A cognitive pilot study was conducted during the week beginning 23rd June 2008. The respondents were informed that they were being asked to go through the questionnaire to be used in the field later and that their views were sought on the following: how well the questionnaire was working; what do respondents understand by the wording used in the questions, what was in their mind when they answer each question; and the structure of the questionnaire.

2.2.6 Overall the questionnaire was well understood, respondents appreciated being given information to inform them and enable them to make a considered decision on their view. However, the pilot survey identified a number of issues with individual questions and a further version of the questionnaire was developed. Changes were also made to the show card material.

2.2.7 A second pilot survey was undertaken in August 2008 with more than 60 respondents. There were no reported difficulties with the questions or show material. Based on the findings of the second pilot, a final version of the questionnaire was agreed by the Steering Group.

2.3 Final Questionnaire Structure

2.3.1 The structure of the final questionnaire took the following form:

- views on water and sewerage issues alongside wider social issues, such as health services, immigration, education, transport and crime prevention (Q1-2);
- awareness/understanding of company(ies) responsibilities (Q3-4);
- overall satisfaction of the current service they receive (Q5-5b);
- approach to paying their bills (Q6-8, Q12);
- value for money of the current service they receive (Q9-11);
- contact with their water/water and sewerage company (Q13-14);
- general overview of company's proposed service offering and the bill level and whether or not this would be acceptable (Q15);
- detailed description of the current service level and costs, and whether this is offers value for money (Q16-18b);
- 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 (Q19-29);
- service areas that would cause most concern if they were delayed (Q30);
- determining customers' preferences with regard to introducing and continuing bill increases over the 5 year period 2010-2015 (Q31); and
- demographic information (Quotas, Q32 onwards).

2.3.2 A copy of the questionnaire is included in Appendix A.

2.3.3 The show material presented to customers contained details of current and proposed future water and sewerage services, as defined in each water company's DBP, submitted to Ofwat in August 2008. Each company's DBP contains planned outputs and associated costs for each. The average bill level change in Wales (water -£0.50, sewerage +£5.00) was much lower than in England (water +£23.05, sewerage +£20.85). Customers only commented on the plans relevant to their own areas. It should be noted that the outputs and bill changes that customers were presented with were based upon individual companies' DBPs and, therefore, may change for final business plans. The variation in planned outputs and bill changes across the 22 companies are presented in the Company Reports. An example set of show cards is included in Appendix B.

2.4 Sampling

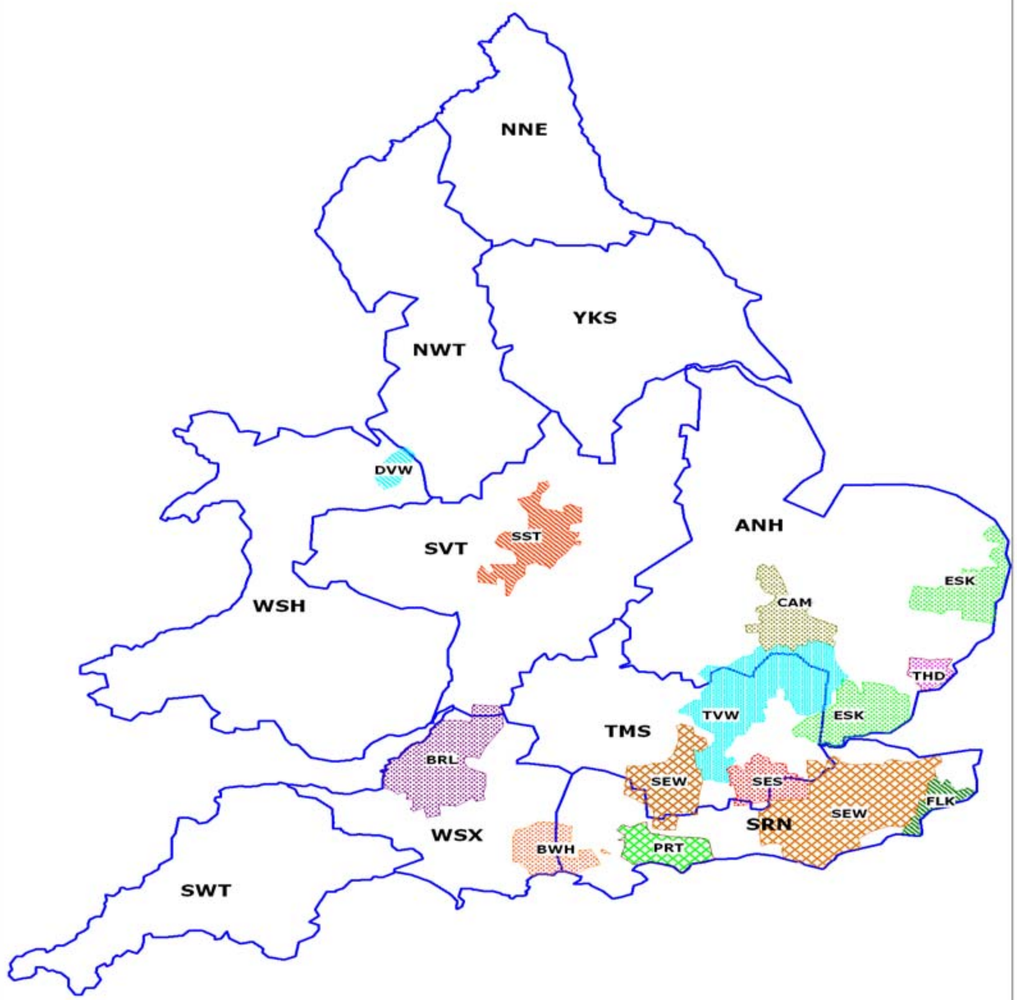
2.4.1 Water companies fall into two categories: those that provide water services only (WoCs) and those that provide water and sewerage services (WaSCs). The WaSCs also provide sewerage services to customers of the water only companies within its region (see Figure 2.1).

2.4.2 The survey was designed to capture customers' views on their company's DBP, and therefore needed to interview 'representative' sub-samples of customers in each water company. Ideally, the survey findings of customers in the sample should be representative of the population on mains water and sewer pipes. In fact, this is difficult as the population profile of such a population (in terms of gender, age, SEG) is unknown, at a national level and at a company level. Therefore, quotas were set on: gender, age and SEG (broadly in line with Census statistics) to ensure that a spread of respondents was obtained.

2.4.3 Only customers who consider themselves to be 'responsible for bill-paying' were deemed to be in scope. The profiles of customers who perceive themselves to be 'responsible' for bill-paying, and separately not responsible, are unknown. Therefore screening questions were included to clarify if respondents perceive themselves to be bill payers. People who stated that they were not responsible were excluded from the survey. The definition of 'bill-paying' customers included:

- sole bill payers;
- jointly responsible for household finances along with their spouse or partner;
- contributor to shared household expenses (e.g. house/flatmate, parents);
- payment through private rent; and
- payment through Council rent/social housing.

Figure 2.1 WASC and WoC Area Overlap



WaSCs		WoCs	
ANH	Anglian Water	BWH	Bournemouth & West Hampshire Water
NNE	Northumbrian Water	BRL	Bristol Water
SVT	Severn Trent Water	CAM	Cambridge Water
SRN	Southern Water	DVW	Dee Valley Water
SWT	South West Water	ESK	Essex & Suffolk Water
TMS	Thames Water	FLK	Folkestone & Dover Water
YKS	Yorkshire Water	PRT	Portsmouth Water
NWT	United Utilities	SEW	South East Water
WSH	Welsh Water Dŵr Cymru	SST	South Staffordshire Water
WSX	Wessex Water	SES	Sutton & East Surrey Water
		THD	Tendring Hundred Water
		TVW	Three Valleys Water

2.4.4 Typically, each WaSC serves a considerably greater number of consumers than each WoC, and therefore the sample was designed to reflect this. For each WaSC, a minimum sample of 300 customers gave their views on its DBP; and for each WoC, a minimum sample of 250 customers gave their views on its DBP. This provides a sampling error (level of precision) of around ±6% at a company level (and ±1% at an overall sample level). Therefore, if 75% of the sample of customers considered Company A's plan to be 'acceptable' then we could be 95% certain that between 69% - 81% of the population of Company A customers consider Company A's plan to be 'acceptable'.

2.4.5 Table 2.1 shows the target and achieved sample sizes by water company. The survey had a total target sample size of 6000 bill-payers. This target was achieved, and 6175 interviews were obtained.

Table 2.1 Target and achieved sub-samples by water company

	Target	Achieved
WaSCs		
Anglian Water	300	300
Northumbrian Water	300	301
Severn Trent Water	300	302
South West Water	300	336
Southern Water	300	302
Thames Water	300	303
United Utilities	300	309
Welsh Water Dŵr Crmru	300	302
Wessex Water	300	300
Yorkshire Water	300	315
WoCs		
Bournemouth & West Hampshire Water	250	293
Bristol Water	250	277
Cambridge Water	250	254
Dee Valley Water	250	257
Essex & Suffolk Water	250	260
Folkestone & Dover Water	250	253
Portsmouth Water	250	254
South East Water	250	254
South Staffordshire Water	250	253
Sutton & East Surrey Water	250	250
Tendring Hundred Water	250	250
Three Valleys Water	250	250
Total	**6000**	**6175**

* A booster sample was undertaken for Bristol Water, Severn Trent Water, Wessex Water, Bournemouth & West Hampshire Water, Yorkshire Water and South West Water to replace a subset of initially collected interviews where SEG had not been accurately recorded.

2.4.6 For each water company the area in scope was identified as follows:

- for each WaSC: the sub-sample was obtained only from those areas where both water and sewerage services are supplied by the WaSC (i.e. areas where water is served by a WoC were excluded from the sampling process);
- for each WoC with a single sewerage service provider: the sub-sample was obtained from the whole company area;
- for each WoC with a 'main' sewerage service provider, and a small overlap with another: the sub-sample was obtained from those areas served by the main sewerage provider only; and
- for each WoC with two 'main' sewerage service providers: the sub-sample was obtained from those areas served by both sewerage providers, to an agreed allocation (see below).

2.4.7 The following sub-sample splits applied at those WoCs where there are two main (WaSC) sewerage service providers:

- Bournemouth & West Hampshire Water: 70:30 Wessex Water / Southern Water;
- Essex & Suffolk Water: 70:30 Anglian Water / Thames Water;
- South East Water: 60:40 Southern Water / Thames Water.

2.4.8 For each water company area, all the Census Output Areas (OAs) that lie entirely within the defined survey catchment area were identified. The 2001 Census deliberately established OAs to be of, broadly, similar size so all OAs have similar sizes of population. OAs were listed by local authority and ward and an appropriate proportion were selected randomly to ensure geographical representativeness. This, in turn, ensured that the interview sample in each company area would provide a good representation of customers across the range of variations in local supply conditions (such as water pressure).

2.4.9 The randomly selected OAs were cross-referenced with the Postal Address File (PAF) to derive a detailed address list for each survey site. Broad quotas were then set (in terms of gender, age and socio-economic group) according to 2001 Census statistics for each selected OA.

2.5 Fieldwork

2.5.1 The fieldwork was undertaken by BMG Research between 8th September and the 26th November 2008.

2.5.2 Prior to the commencement of fieldwork, all supervisors were briefed by a member of BMG professional staff and, in turn, all interviewers were briefed by their fieldwork supervisor. A copy of the interviewer briefing notes is included in Appendix C.

2.5.3 Interviews were conducted during the week, at weekends and at various times of the day in order to achieve the desired quotas and be carried out at a time convenient to customers. Interviews were conducted using Computer Assisted Personal Interviewing (CAPI) units, which are hand-held mini computers containing the questionnaire in electronic format.

2.6 Analysis

2.6.1 A detailed, comprehensive data analysis was undertaken by experienced quantitative researchers using SPSS and Microsoft Excel. This first stage of analysis provided an initial understanding of the data through interpretation of frequency counts, univariate (single variable) summary statistics and cross tabulations (segmentations) by two or more variables. Using information from this initial data review, further analyses explored relationships in the data with key break variables such as demographics.

2.6.2 For this overall report, data from all WaSCs and WoCs has been aggregated. In order to make the overall sample representative of all bill-payers in England and Wales, each company's sample has been weighted in proportion to the number of household properties billed for water (see Appendix D). [Results at company level in this report and the Company reports have not been weighted].

2.6.3 In the results chapters that follow, differences in attitude across different sections of the public have been explored at an overall (England and Wales) and company level.

2.6.4 To establish separate England/Wales samples, companies whose customers fall into both England and Wales were assigned to the country to whom the majority of their customers belong. Therefore, all Welsh Water Dŵr Cymru (302) and Dee Valley (257) customers were classified as 'the Welsh' sample (total sample 559); and Severn Trent (302) customers were assigned to the 'England' sample (total sample 5616), regardless of which country each respondent actually lived. For customers overall, we have combined the views of customers in England and Wales by the total number of customers in each country. Given that there are more customers in England than in Wales the results reported at an overall level are more aligned with those of customers in England, than with those of customers in Wales. In the result tables, reported in Chapters Three to Seven, customers in England are denoted by a flag of St George, and customers in Wales by the Welsh flag.

2.6.5 As the findings at company level have been aggregated to give an overall picture, care must be taken when interpreting customers' wishes for future water and sewerage services at an aggregated overall level. This is because each company starts from a different baseline position in terms of current service and price and makes proposals for a range of different outputs and costs. While the phrasing of the questions on the questionnaire was the same for all customers the show card material was different. Planned output levels across the 14 service elements vary considerably - from maintaining service to extensive improvements.

2.6.6 For completeness, and to aid comparisons, customer reaction to each question in turn is reported by company and overall level in Appendix E. A full account of customer views is reported, for each company in turn, in the accompanying Company Report [with statistical differences shaded].

Statistical Testing

2.6.7 Data has also been analysed to compare perceptions and attitudes amongst different customer segments where appropriate and when sample sizes allowed. Statistical tests can be, and have been, undertaken to establish significant variations in response by different customer segment. We have carried out appropriate tests on all questions, even those where different contextual issues apply (such as different current and proposed service levels for different customers). Although the statistical tests are quite appropriate it should always be noted that the differences identified as statistically significant may arise from contextual differences, personal factors or both of these.

2.6.8 In the results chapters that follow, we **only** report results at a segmented level where we have found differences to be statistically significant. Unless stated otherwise, these differences have been found to be statistically significant at the 99% confidence level. Differences amongst different customer segments within each company are identified in the separate Company Report and have been found to be statistically significant at the 95% confidence level[7].

2.6.9 We have identified any statistically significant variations by the following customer types:

- socio-economic class (A/B, C1/C2, D/E);
- household income level – gross per annum (<£10,000, £10,000 - £19,999, £20,000 - £29,999, £30,000+, don't know/refused);
- household size (1, 2, 3+ occupants);
- whether or not respondents are metered (those who opted for a meter, those who have a meter for other reasons, those not on a meter); and
- the rural or urban nature of the location[8].

2.6.10 In addition, on key questions within the report, the following further segmentation has also been examined:

- whether views differ between customers of companies proposing differential price increases (both in actual values and percentage increases);
- views of people who have had a negative experience/cause to complain about their water company (Question 14);
- views of those who have a good awareness/understanding of their company(ies) responsibilities (gleaned from Question 3 – good awareness/understanding = customers who correctly identified 6 or more of the company responsibilities, fair awareness/understanding = customers who identified 3-5 responsibilities, poor awareness/understanding = customers who identified 2 or less responsibilities);
- difference between the responses of those who are confident that they know the cost of their water (Question 8) and those who do not;
- difference in the responses of those areas affected by the 2007 summer floods and areas not affected (major incidents were at Hull (Yorkshire Water) and Gloucestershire (Severn Trent Water);
- those who think the environment is important (those who answered that it was "very" important in Question 1");
- those who think the cost of living is important (those who answered that it was "very" important in Question 1");

[7] The reduced threshold in statistical testing is because of the much smaller sub-sample sizes at company level, compared with statistical testing at an overall, aggregate level.

[8] The Rural/Urban groupings used were from the Office National Statistics Neighbourhood Statistics website: http://www.neighbourhood.statistics.gov.uk/dissemination/MetadataDataset.do?adminCompId=20489&metadataType=DatasetFamily

- those who think water and sewerage services are important (those who answered that it was "very" important in Question 1");
- whether views differ depending on the approach to paying bills (Question 12);
- whether views differ depending on satisfaction with current service (Question 5), and Value for money of current service (Question 9);
- scale (measured by the number) of proposed service improvements in water, sewerage and overall DBP.

2.6.11 For completeness, the results of these further segmentations, where statistically significant, have been included in Appendix F.

2.6.12 When conducting our statistical testing, we have typically tested the following type of question: *"is the level of **X** independent of the level **Y**?".* Where we have found that the two variables are **not** independent, we can conclude that customers have a significantly different value of X (e.g. satisfaction) depending on their level of Y (e.g. socio-economic group). In contrast, if we have found that that the two variables are independent, we can conclude that customers have the same level of X regardless of their level of Y.

2.6.13 Where we have identified statistically significant differences in **mean** scores by, say, socio-economic group compared with overall, we can conclude that socio-economic group does affect satisfaction levels, and that the satisfaction level amongst customers in one socio-economic group is significantly different from the satisfaction level of customers in another socio-economic group.

2.7 Context setting

2.7.1 When interpreting the results of this research, a number of important issues must be considered that may have impacted on the opinions of respondents. These are:

Economic downturn and rising costs

2.7.2 When the surveys took place in September-November 2008, economic issues were very much in the news. Developments in the US subprime mortgage market triggered a credit shock that was intensifying into the worst global financial crisis for generations and affected property markets in the UK quickly. The rise in commodity prices which had built over a number of years peaked in July 2008, pushing inflation to a 16 year high and squeezing household real incomes. These shocks should be borne in mind when interpreting the results reported in Chapters 3 onwards.

Cryptosporidium outbreak

2.7.3 Between June – August 2008 there were two separate outbreaks of the cryptosporidium parasite in water supplies in England and Wales. For two weeks, starting early on the 25th June 2008, households across communities in Northamptonshire were instructed by Anglian Water to boil their drinking water. Vulnerable customers on Anglian Water's 'WaterCare' register, and schools and hospitals were supplied with bottled water.

2.7.4 The cryptosporidium parasite was discovered in routine samples taken at the Pitsford Water Treatment Works during the night of the 24th June 2008. The works supplies 108,000 households across 85 communities in Northamptonshire.

2.7.5 On 30th June 2008 Anglian Water announced that Pitsford water treatment works was producing water which was free of cryptosporidium, but it was another four days after this before the drinking water in the supply network was declared completely safe to drink again.

2.7.6 In mid August 2008 the cryptosporidium parasite was detected in Gwynedd and Anglesey, Wales and households were again advised to boil their tap water before drinking it. The boil water notice was issued on 29th August 2008 and lifted on 18th September 2008. Approximately 45,000 people in the Gwynedd and Anglesey area of North Wales were affected by the notice to boil their water before using it.

Flooding

2.7.7 In June and July 2007, there were several periods of extreme rainfall which gave rise to widespread flooding in England and parts of Wales. These summer floods brought to light how susceptible communities in England and Wales are to flooding, now and increasingly so in the future. Approximately 49,000 households and nearly 7,000 businesses were flooded. Major infrastructure such as transport links, schools, power and water supplies were disrupted. The main incidents of flooding occurred at Hull (Yorkshire Water) and Gloucestershire (Severn Trent Water).

2.7.8 After the floods in July 2007, there was further flooding in January 2008, especially in Wales and the West Midlands, which served as a reminder that extreme flooding events are not a one-off.

2.8 Profile of respondents

2.8.1 Table 2.2 shows the profile of respondents. The breakdown by age shows that our sample of bill-payers has a slightly older profile than for the adult population overall (37% of our sample, unweighted, are aged 60 years or more, compared with 27% in England/Wales[9]). It is believed that the population of bill-payers will have a higher proportion of elderly people than the population as a whole, so this result was expected.

[9] Office for National Statistics (ONS)

Table 2.2 Profile of respondents

	Frequency	% of respondents (unweighted)	% of respondents (weighted)
Gender			
Male	2979	48%	49%
Female	3196	52%	51%
Total	6175	100%	100%
Age			
18-24 years	309	5%	6%
25-29 years	515	8%	10%
30-39 years	1021	17%	18%
40-49 years	1080	18%	17%
50-59 years	801	13%	12%
60+ years	2296	37%	35%
Refused	153	3%	3%
Total	6175	100%	100%
Socio-Economic Group			
A / B	1271	21%	20%
C1 / C2	2749	45%	44%
D / E	2063	33%	35%
Refused	92	2%	1%
Total	6175	100%	100%

2.8.2 Table 2.3 illustrates the household income, household size and location of respondents.

Table 2.3 Household income / size / location

	Frequency	% of respondents (unweighted)	% of respondents (weighted)
Household Income (Gross, P.A.)			
Less than £10,000	1152	19%	17%
£10,000 - £19,999	1058	17%	15%
£20,000 - £29,999	603	10%	9%
£30,000 - £39,999	416	7%	7%
£40,000 - £49,999	240	4%	4%
£50,000 - £59,999	161	3%	3%
£60,000 or more	187	3%	3%
Don’t know / can’t say / refused	2358	38%	43%
Total	6175	100%	100%
Household Size			
1	1409	23%	22%
2	2293	37%	35%
3+	2466	40%	42%
Total	6168	100%	100%
Location			
Rural	1108	18%	15%
Urban	5067	82%	85%
Total	6175	100%	100%

2.8.3 Table 2.4 illustrates the Council Tax band of respondents, and Table 2.5 gives the proportion of respondents who are on a water meter.

Table 2.4 Council tax band

	Frequency	% of respondents (unweighted)	% of respondents (weighted)
Council Tax Band - England			
A	374	7%	8%
B	508	9%	9%
C	589	11%	9%
D	687	12%	11%
E	254	5%	3%
F	97	2%	2%
G	68	1%	1%
H	17	*%	*%
Don't know	3022	54%	56%
Total	5616	100%	100%
Council Tax Band - Wales			
A	11	2%	2%
B	40	7%	6%
C	54	10%	13%
D	65	12%	13%
E	47	8%	7%
F	23	4%	5%
G	6	1%	1%
Don't know	313	56%	52%
Total	559	100%	100%

* non-zero but less than 0.5%

Table 2.5 Charged by meter?

	Frequency	% of respondents (unweighted)	% of respondents (weighted)
Charged by a meter?			
Yes	1862	30%	26%
No	3990	65%	68%
Don't know / can't say	323	5%	6%
Total	6175	100%	100%
Reason for having a meter?			
Was already installed when I moved in	944	51%	57%
Opted for one to be installed	824	44%	39%
Had no choice / had to have a meter	80	4%	4%
Other	1	*%	*%
Don't know / can't say	13	1%	1%
Total	1862	100%	100%

* non-zero but less than 0.5%

3 Views on Social Issues

3.1 Question context

3.1.1 Customers were asked their views on water and sewerage issues alongside wider social issues, such as health services, immigration, education, transport and crime prevention. They were also presented with a list of environmental issues and asked which were most important to them (the order varied for different respondents).

3.2 Summary findings

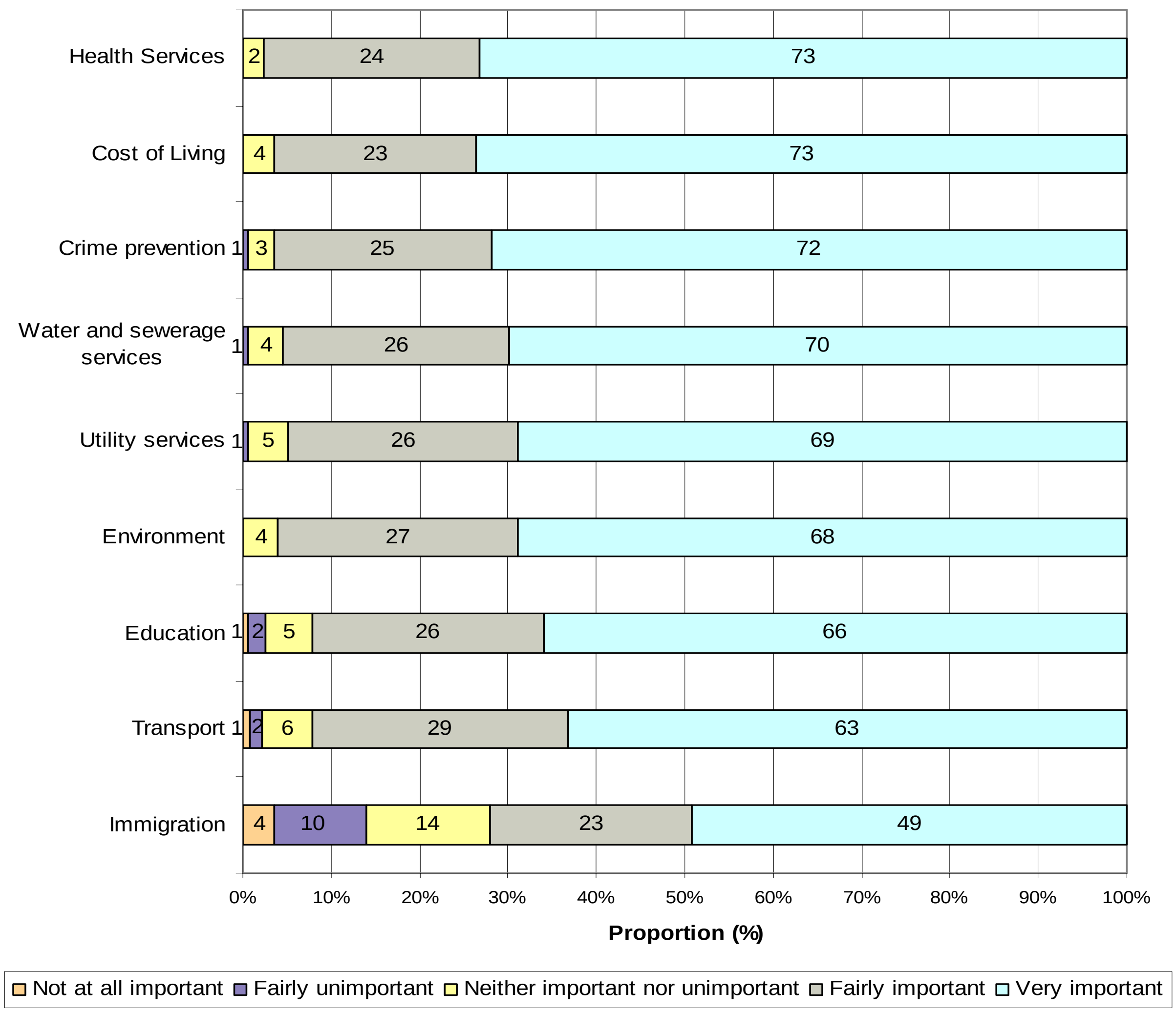
With the exception of immigration, more than nine in ten customers consider each of the social issues to be important ("very"/"fairly"). Customers generally consider water and sewerage services as important as other wider social issues, such as health services, cost of living, crime prevention, utility services and the environment.

Environmental issues that are most important to customers are reducing climate change, reducing litter and household waste, improving air quality and protecting the water environment (streams, canals, rivers, lakes, wetlands and sea around the coast).

3.3 Importance of social issues

3.3.1 Thinking about their local area, customers were asked, how important, if at all, were a number of issues to them, on a scale of one to five, where one is not at all important, and five is very important. Figure 3.1 shows the results.

Figure 3.1 Importance of social issues – Overall (England / Wales combined)



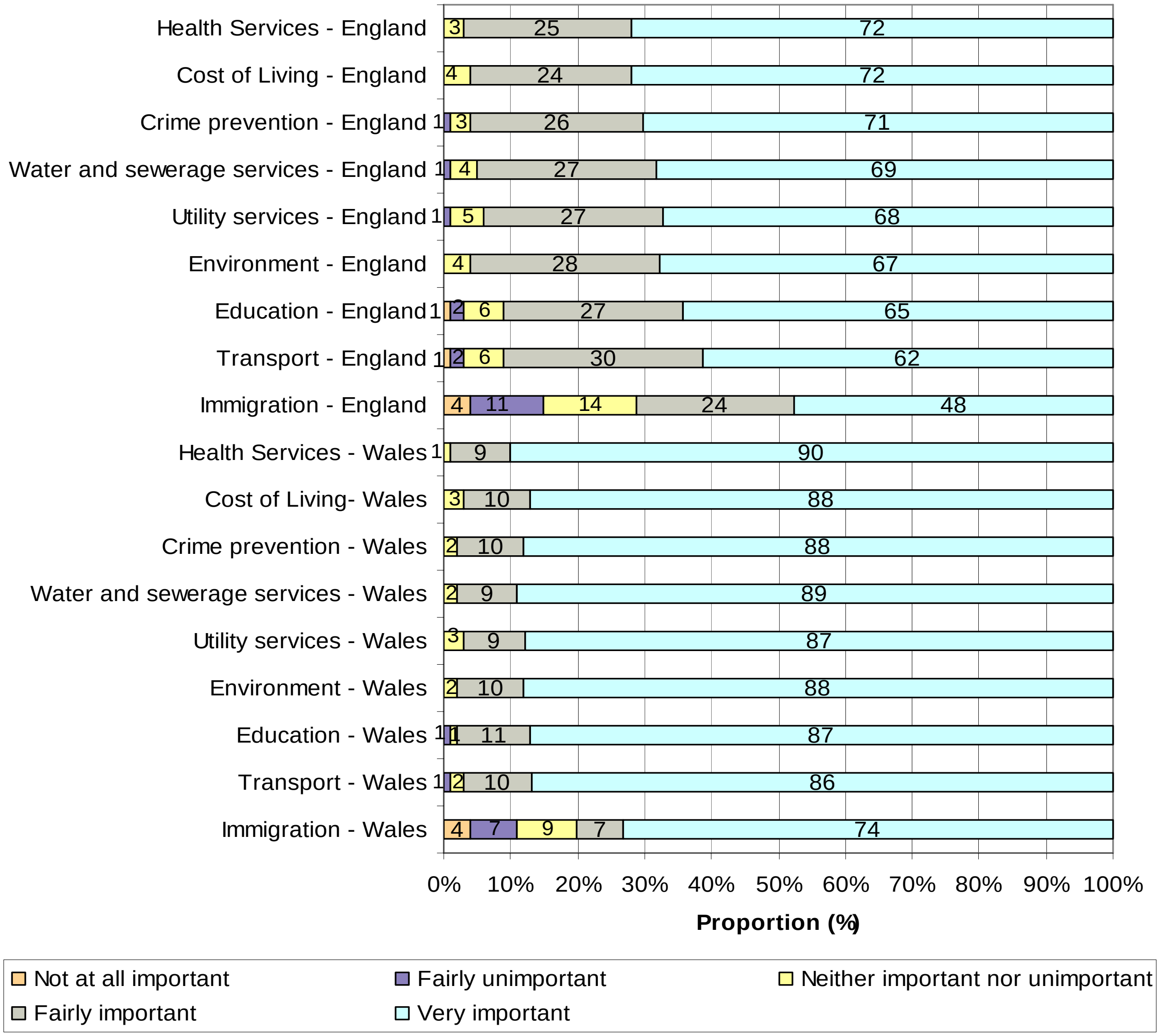
3.3.2 Figure 3.1 illustrates that with the exception of immigration, the vast majority (more than nine in ten) of customers consider each of the social issues to be important ("very"/"fairly").

3.3.3 More than seven in ten customers, overall, felt that the following services were **"very important"**: health services (73%), cost of living (73%), crime prevention (72%) and water and sewerage services (70%).

3.3.4 Immigration was considered to be the least important social issue (4% - not at all important, 10% fairly unimportant, 14% neither important nor unimportant).

3.3.5 Figure 3.2 highlights the results for both the England and Wales samples.

Figure 3.2 Importance of social issues – England / Wales



3.3.6 Figure 3.2 illustrates that a higher proportion of customers in Wales rated each of the social issues as "very important" compared to customers in England.

3.3.7 For each of the social issues, the highest proportion of customers rating the issue as "very" important were in Welsh Water Dŵr Cymru, and the lowest proportion rating the issues as "very" important were in Portsmouth/Southern, with the exception of water and sewerage services, for which the lowest proportion of customers rating it as "very" important were from Tendring Hundred/Anglian (52% compared to 91% in Welsh Water Dŵr Cymru).

Table 3.1 Importance of social issues - % who consider them "very" important

	Min. value across all companies	Max. value across all companies
Education	41% - Portsmouth/Southern	88% - Welsh Water Dŵr Cymru
Transport	34% - Portsmouth/Southern	88% - Welsh Water Dŵr Cymru
Health Services	41% - Portsmouth/Southern	91% - Welsh Water Dŵr Cymru
Crime prevention	41% - Portsmouth/Southern	90% - Welsh Water Dŵr Cymru
Environment	36% - Portsmouth/Southern	90% - Welsh Water Dŵr Cymru
Cost of living	50% - Portsmouth/Southern	89% - Welsh Water Dŵr Cymru
Immigration	19% - Portsmouth/Southern	74% - Welsh Water Dŵr Cymru
Water and sewerage services	52% - Tendring Hundred/Anglian	91% - Welsh Water Dŵr Cymru
Utility services	49% - Portsmouth/Southern	89% - Welsh Water Dŵr Cymru

3.4 Environmental issues

3.4.1 Customers were asked which environmental issues were most important to them (choosing up to two options). The order varied for different respondents to avoid bias. The results are reported in Table 3.2.

Table 3.2 Importance of environmental issues

				Min. value across all companies	Max. value across all companies
Reducing climate change	46%	45%	61%	20%	62%
Reducing litter and household waste	37%	37%	33%	16%	51%
Improving air quality	32%	32%	32%	16%	53%
Protecting the water environment (streams, canals, rivers, lakes, wetlands and sea around the coast)	26%	27%	17%	8%	53%
Improvements to tackling flooding from heavy rains	16%	16%	15%	6%	35%
Encouraging people to use less water in homes and gardens	11%	11%	12%	4%	32%
More activity on nature conservation, wildlife, woodlands, countryside	10%	10%	12%	5%	28%
Other	1%	1%	1%	0%	5%
None of these	2%	2%	2%	0%	8%
Don't know	2%	2%	2%	0%	14%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

3.4.2 Overall, reducing climate change (46%), reducing litter and household waste (37%) and improving air quality (32%) were considered the most important. This top three ordering also applies for bill-payers in England and Wales separately.

3.4.3 The pattern of responses varied across the 22 English and Welsh water companies. The importance of reducing climate change ranged from as low as 20% amongst South West Water customers to 62% amongst Welsh Water Dŵr Cymru customers; and the importance of reducing litter and household waste ranged from 16% amongst Yorkshire Water customers to 51% amongst United Utilities customers.

3.4.4 In areas where major incidents occurred in the 2007 summer floods, a higher proportion of customers thought that improvements to tackling flooding from heavy rains were important (27% Severn Trent Water, and 23% Yorkshire Water), than the overall (England and Wales) result (16%). Other companies that had a higher than the overall average proportion of customers who thought that improvements to tackling flooding from heavy rains were important were: Sutton & East Surrey (35%); Wessex (28%); Bournemouth & West Hampshire (27%); Anglian (17%); Northumbrian (17%); and South Staffordshire (17%).

4 Uninformed Views of Current and Future Services

4.1 Question context

4.1.1 This chapter reports customers' awareness of perceived responsibilities/importance of services of water companies/water and sewerage companies. It also provides customers' views of the current services received, including overall satisfaction and value for money, their approach to paying bills, and extent of contact with their water company(ies).

4.1.2 In the final section, we report customers' level of acceptance of their companies' proposed service offering and bill level, when shown the impact this would have on their bills, but without any supporting details. This was done so as to provide insight into the likely reaction, in reality, of most customers - who are likely to be relatively **uninformed** (i.e. fairly low awareness of service improvements, statutory requirements and bill impacts of different service components).

4.1.3 This chapter only includes customer feed-back on current / proposed future water and sewerage services at an overall combined level. Views on current and future service levels are examined separately (for water and sewerage) in Chapters 5 onwards.

4.2 Summary findings

The majority of respondents were aware that their water and sewerage company(ies) were responsible for: providing safe, reliable, clean drinking water (83%), removal and treatment of waste water (70%) and maintaining pipes, treatment works, and other infrastructure (68%).

At least one in four customers overall incorrectly thought that their water and sewerage company(ies) were responsible for reducing litter in waterways (52%), preventing flooding from rivers (50%) managing water pollution from agriculture and manufacturing (45%), and managing canal systems (39%).

Overall, the services customers most often identified as important were: providing safe, reliable, clean drinking water (82%); followed by removal and treatment of waste water (46%); and maintaining pipes, treatment works, and other infrastructure (39%). Services that customers considered less important were: helping to reduce greenhouse gas emissions and tackle climate change (11%), and drainage of roads (12%).

86% of customers stated that they were satisfied with the services provided by their company(ies), the main reasons being that there was a good/reliable service with no interruptions, they had experienced no problems, and the water is good/clean quality. Overall, just 6% of customers indicated that they were dissatisfied with their water and sewerage service, because the service was perceived to be too expensive already, prices are always increasing and there is a poor/unreliable water service. Satisfaction levels varied significantly across the companies, from 94% ("very"/"fairly") of customers of Yorkshire Water to 73% of Portsmouth Water/Southern customers.

64% of customers stated that the current water and sewerage service was fairly/very good value for money, the main reasons being that the bill was affordable (42%), they valued the service (30%) and the service was worth the money (25%). 17% of customers stated that the current water and sewerage service was fairly/very poor value for money, the main reason being that it was too expensive already (72%). The main reasons for good/poor value for money highlight that a key driver for value for money perceptions is affordability.

A higher proportion of customers in Wales stated that their current service offers "fairly" good value for money (64%) compared to England (55%). The greatest variation in perceived value for money was amongst customers of water and sewerage services in the Bristol region where more people considered the service to offer poor value for money (42%) than good value for money (37%), Three Valleys Water/Thames (43% good value for money, 35% poor value for money) and South West Water (47% good value for money, 30% poor value for money).

Customers were presented with a very brief description of proposed new service levels for 2010-15 and the overall bill increase (to mirror the likely limited level of information people will receive in reality – therefore a relatively 'uninformed' view). 62% felt that the water and sewerage plan was acceptable, 33% felt that it was unacceptable, and 5% stated that they did not know.

Customers whose bill impact/percentage bill change was lowest were more accepting of the combined DBPs.

At a company level, acceptance was highest amongst customers of Yorkshire Water (95% "very"/"fairly" acceptable) and Welsh Water Dŵr Cymru (93%), and lowest amongst customers of water and sewerage services in the Bristol region (24%"very"/"fairly" acceptable) and South West Water (28%).

The majority (85%) of customers do not find it difficult to pay their water and sewerage bill(s) on time. However, 11% stated that they usually pay on time but it can be difficult.

A higher proportion of customers in socio-economic group A/B stated that they don't find it difficult to pay their bill on time (89%), compared with 84% in groups C1/C2, and 75% in groups D/E. Furthermore, levels of combined DBP acceptance was highest amongst customers in socio-economic group A/B (62%), followed by those in group C1/C2 (59%), and those in group D/E (54%).

The proportion of customers who stated that they do not find it difficult to pay their bills on time increased with household income, as did acceptance of the combined DBP.

4.3 Perceived water company / water and sewerage company responsibilities

4.3.1 Customers were presented with a list of services, and asked which they thought their water and sewerage company(ies) were responsible for (multi-coded responses). Table 4.1 shows that the majority of respondents were correctly aware that their water and sewerage company(ies) were responsible for: providing safe, reliable, clean drinking water (83%), followed by removal and treatment of waste water (70%) and maintaining pipes, treatment works, and other infrastructure (68%).

4.3.2 However, around half incorrectly thought that their water and sewerage company(ies) were responsible for reducing litter in waterways (52%), preventing flooding from rivers (50%)

managing water pollution from agriculture and manufacturing (45%), and managing canal systems (39%).

Table 4.1 Water company responsibilities

Percentage who think their water company is responsible for each of the following …				**Min. value across all companies**	**Max. value across all companies**
Providing safe, reliable, clean drinking water ✓	83%	83%	88%	57%	96%
Removal and treatment of waste water ✓	70%	70%	82%	45%	84%
Maintaining pipes, treatment works, and other infrastructure ✓	68%	67%	81%	45%	86%
Protecting the water environment ✓	63%	63%	75%	42%	78%
Dealing with sewer flooding ✓	61%	61%	75%	41%	75%
Drainage of roads ✓	53%	52%	75%	26%	76%
Reducing litter in waterways ×	52%	50%	73%	33%	74%
Preventing flooding from rivers ×	50%	48%	68%	27%	72%
Managing water pollution from agriculture and manufacturing ×	45%	44%	61%	24%	71%
Helping to reduce greenhouse gas emissions and tackle climate change ✓	40%	39%	47%	22%	64%
Managing canal systems ×	39%	38%	55%	14%	67%
Other	*%	*%	0%	0%	2%
None of these	*%	*%	0%	0%	1%
Don't know	2%	2%	*%	0%	16%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%. ✓ water company responsibility, × not a water company responsibility.

4.3.3 A higher proportion of Wales customers thought that their water company(ies) were responsible for all of the services listed (including those they were not responsible for), compared to customers in England.

4.3.4 In general a higher proportion of customers in Thames Water, Welsh Water Dŵr Cymru and Severn Trent Water were correctly aware of the water companies' responsibilities, whereas customers of water and sewerage services in the Bristol region and Northumbrian Water were least aware. However, it should be noted that Welsh Water Dŵr Cymru also generally had the highest proportion of customers who incorrectly thought that their water and sewerage company(ies) were responsible for some of the responsibilities, whereas customers of water and sewerage services in the Bristol region generally had the lowest incorrect proportion.

4.3.5 There was also some evidence to suggest that awareness/understanding of company(ies) responsibilities is positively correlated with SEG. Higher SEG customers were also more inclined to acknowledge good service quality in the existing service offering (see Section 4.8).

4.4 Importance of services provided

4.4.1 Customers were asked to consider individual services provided by their water and sewerage company(ies), and decide which they thought were most important (choosing up to three services). Table 4.2 shows that, overall, the services customers considered the most important were:

- Providing safe, reliable, clean drinking water (82%);
- Removal and treatment of waste water (46%); and
- Maintaining pipes, treatment works, and other infrastructure (39%).

4.4.2 Services that customers considered less important, overall, were: helping to reduce greenhouse gas emissions and tackle climate change (11%), and drainage of roads (12%).

4.4.3 Dealing with sewer flooding was considered important by 13% of customers in Wales, compared to 22% of customers in England. However, maintaining pipes, treatment works, and other infrastructure was considered important by 56% of customers in Wales, compared with 38% of customers in England.

Table 4.2 Importance of services provided by the water company(ies)

				Min. value across all companies	Max. value across all companies
Providing safe, reliable, clean drinking water	82%	82%	86%	50%	93%
Removal and treatment of waste water	46%	46%	56%	28%	61%
Maintaining pipes, treatment works, and other infrastructure	39%	38%	56%	25%	56%
Protecting the water environment	23%	23%	26%	9%	34%
Dealing with sewer flooding	22%	22%	13%	9%	36%
Dealing with customer complaints and enquiries	18%	18%	19%	8%	39%
Drainage of roads	12%	12%	11%	4%	24%
Helping to reduce greenhouse gas emissions and tackle climate change	11%	11%	11%	4%	26%
Other	*%	*%	*%	0%	4%
None of these	*%	*%	0%	0%	1%
Don't know	1%	1%	*%	0%	15%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

4.4.4 The proportion of customers who thought that providing safe, reliable, clean drinking water was important varied from 50% in Wessex Water, to 93% in Severn Trent Water; whereas the removal and treatment of waste water varied from 28% (Northumbrian Water) to 61% (Severn Trent Water).

4.4.5 A higher proportion of customers in socio-economic group A/B thought that the removal and treatment of waste water was important (51%) compared to those in SEG group C1/C2 (47%) and D/E (42%).

4.5 Satisfaction with current water and sewerage services (combined)

4.5.1 Customers were asked to rate their overall satisfaction with their current water and sewerage services (combined). The level of service varies from company to company, possibly due to differences in the quality of the natural environment and investment decisions made in the past. Portrayals by local media may also impact on customers perceptions of levels of service. (Descriptions of each water company's current provision are reported within each company section of the Company Report). Customer satisfaction levels are reported at an overall level in Table 4.3. This table also shows the range of variation across the 22 companies.

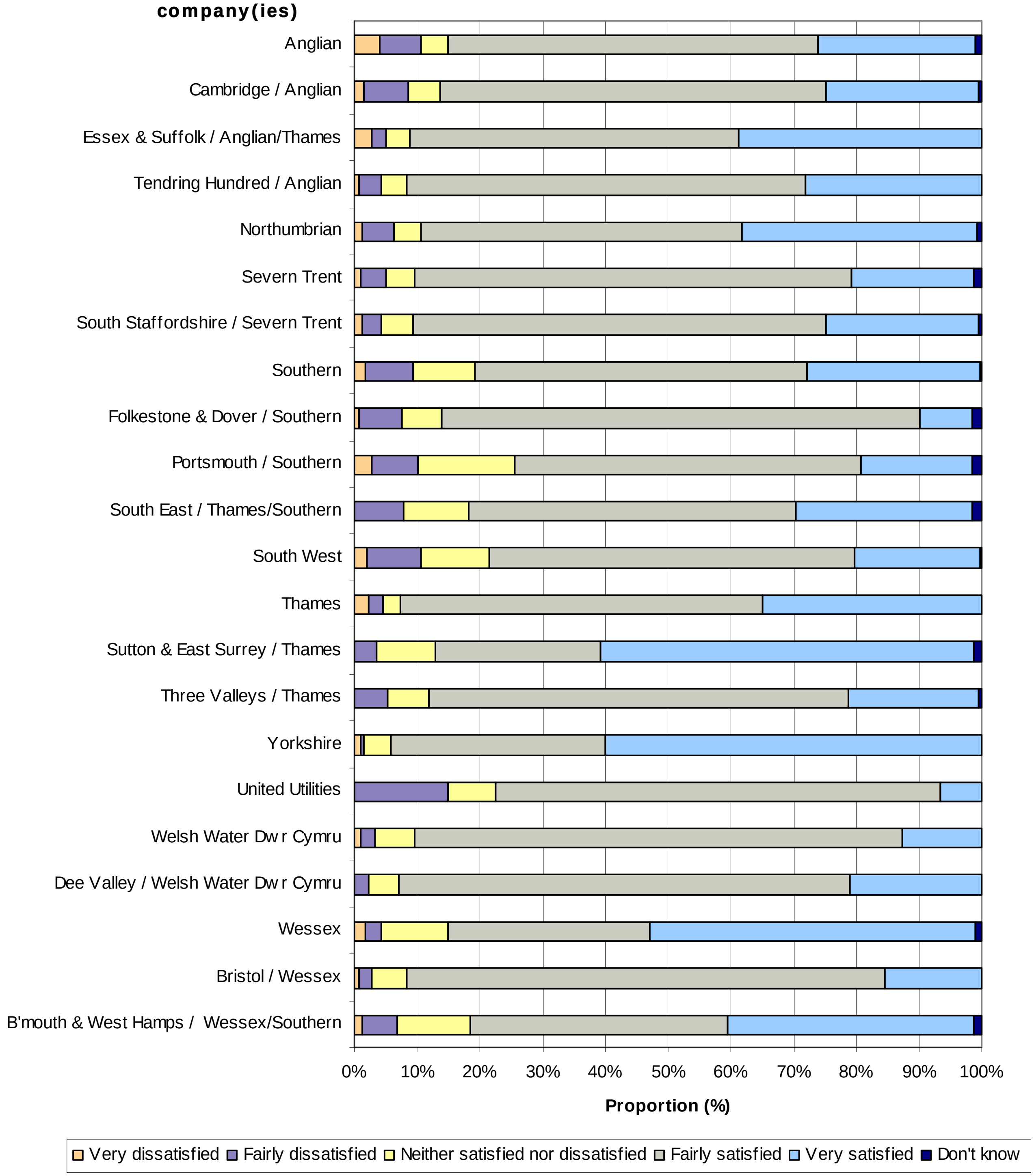
Table 4.3 Satisfaction with water company(ies) current service (water and sewerage combined)

				Min. value across all companies	Max. value across all companies
Very dissatisfied	1%	1%	1%	0%	4%
Fairly dissatisfied	5%	6%	2%	1%	15%
Neither satisfied nor dissatisfied	6%	6%	6%	3%	15%
Fairly satisfied	59%	58%	77%	26%	78%
Very satisfied	27%	28%	13%	6%	60%
Don't know	1%	1%	0%	0%	2%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

4.5.2 Most respondents (86%) were "fairly" or "very" satisfied with the current level of service provided by their company(ies), increasing to 90% amongst customers in Wales. Less than one in ten customers (6%) were "fairly" or "very" dissatisfied with current services. A further 6% were neither satisfied nor dissatisfied.

4.5.3 Satisfaction levels varied significantly across the companies, from 94% ("very"/"fairly") of customers of Yorkshire Water to 73% of Portsmouth Water/Southern customers (by which we mean customers receiving water services from Portsmouth water, and sewerage services from Southern Water). This can be seen in Figure 4.1.

Figure 4.1 Satisfaction with current water and sewerage services (combined) by company(ies)



4.5.4 Customers who stated that they were "fairly" or "very" **dissatisfied** with the current level of service provided by their water and sewerage company(ies) were asked what the main reason for this was. Table 4.4 shows that the main reasons, overall, were that the service was perceived to be too expensive already (34%), prices are always increasing (29%) and there is a poor/unreliable water service (18%).

4.5.5 Almost half (49%) of the customers in Wales who were dissatisfied[10] stated that the main reason for their dissatisfaction was that there was a poor/unreliable water service, compared to 17% of customers in England. Only 2% of customers in Wales stated that the reason they were dissatisfied was because the service was too expensive already, compared to 35% of customers in England.

4.5.6 Reasons for dissatisfaction varied across the companies. A higher proportion of customers of Cambridge Water/Anglian stated that they were dissatisfied because the service was too expensive already (68%), compared to other companies, however, a higher proportion of United Utilities customers stated that the main reason they were dissatisfied with their water and sewerage service is because prices are always increasing (63%). Because this question was only asked of a sub-set of respondents the small sample size should be considered when interpreting the results.

Table 4.4 Main reasons some customers are dissatisfied with the current level of service (water and sewerage combined)

				Min. value across all companies	Max. value across all companies
Too expensive already	34%	35%	2%	0%	68%
Prices always increasing	29%	29%	0%	0%	63%
Poor / unreliable – unspecified	5%	4%	19%	0%	22%
Poor / unreliable – water	18%	17%	49%	0%	69%
Poor / unreliable – sewerage	6%	6%	9%	0%	20%
Poor water pressure	1%	1%	0%	0%	20%
Too many incidents of flooding / drainage problems	2%	2%	0%	0%	9%
Other	3%	3%	11%	0%	33%
Don't know	3%	3%	9%	0%	58%
Total	100.0	100.0	100.0		
Base	396	380	16		

4.5.7 Customers who stated that they were "fairly" or "very" **satisfied** with the current level of service provided by their water and sewerage company(ies) were asked what the main reason for this was. Table 4.5 shows that the main reasons were that there was a good/reliable service with no interruptions (44%), they had experienced no problems (23%) and that water is good quality/clean (14%).

[10] Note this is a small sub-sample of only 16 respondents, so these findings can only be considered indicative

Table 4.5 Main reasons most customers are satisfied with the current level of service (water and sewerage combined)

				Min. value across all companies	Max. value across all companies
Good/reliable service/ no interruptions	44%	43%	52%	1%	89%
Good value for money	7%	6%	16%	2%	16%
Water is good quality/clean	14%	14%	19%	2%	43%
No flooding	1%	1%	*%	0%	7%
No problems - unspecified	23%	23%	11%	0%	60%
No problems - water	10%	10%	*%	0%	47%
No problems - sewerage	*%	*%	0	0%	1%
Other	*%	*%	0%	0%	2%
Don't know	2%	2%	*%	0%	20%
Total	100.0	100.0	100.0		
Base	5313	4801	512		

* non-zero but less than 0.5%

4.5.8 Reasons for satisfaction varied across companies. The proportion of customers who stated that the main reason they were satisfied with their water and sewerage company(ies) because there was a good/reliable service/with no interruptions varied from 1% (Bristol region) to 89% (Tendring Hundred/Anglian), whereas the proportion who stated that the main reason was because there were no problems ranged from 0% (Tendring Hundred/Anglian) and 2% (Yorkshire Water) to 60% (Anglian Water).

4.6 Paying for water and sewerage services

4.6.1 Customers were asked whether they pay for their water and sewerage services combined in one bill or in two separate bills. Table 4.6 illustrates that the majority of customers believed that they paid for their water and sewerage services combined in one bill in most areas except Bournemouth & West Hampshire Water/ Wessex/Southern, Essex & Suffolk Water/ Anglian/Thames, Folkestone & Dover Water/Southern and South East Water/ Thames/Southern.

Table 4.6 Water and sewerage bills

Company	Water and sewerage services combined in 1 bill	Water and sewerage services in 2 separate bills	Don't know	Sample
Anglian	96%	1%	3%	300
B'mouth & West Hamps / Wessex/Southern	5%	74%	20%	293
Bristol / Wessex	92%	3%	5%	277
Cambridge / Anglian	86%	5%	9%	254
Dee Valley / Welsh Water Dŵr Cymru	96%	1%	4%	257
Essex & Suffolk / Anglian/Thames	30%	59%	10%	260
Folkestone & Dover / Southern	11%	80%	9%	253
Northumbrian	94%	2%	1%	301
Portsmouth / Southern	15%	74%	11%	254
Severn Trent	95%	2%	3%	302
South East / Thames/Southern	38%	54%	9%	254
South Staffordshire / Severn Trent	92%	5%	4%	253
South West	87%	5%	8%	336
Southern	89%	4%	7%	302
Sutton & East Surrey / Thames	76%	8%	15%	250
Tendring Hundred / Anglian	91%	4%	5%	250
Thames	63%	0%	36%	303
Three Valleys / Thames	87%	1%	12%	250
United Utilities	100%	0%	0%	309
Welsh Water Dŵr Cymru	97%	1%	2%	302
Wessex	92%	0%	8%	300
Yorkshire	97%	0%	8%	315
Overall	**84%**	**7%**	**9%**	**6175**
England	**83%**	**7%**	**10%**	**5616**
Wales	**97%**	**1%**	**2%**	**559**

No comment has been made on the accuracy of these estimates as the information on the different circumstances is not available.

4.7 Estimate of bill

4.7.1 Customers were asked to estimate approximately how much they paid for their water and sewerage services. Just over half of respondents felt able to provide an estimate of the bill (n=3369). Table 4.7 illustrates that, overall, the majority of customers (73%) estimated their yearly water and sewerage bill to be between £200 - £499.

4.7.2 Three in ten (30%) customers in England estimated that their yearly water and sewerage services bill was <£299, compared to 18% of customers in Wales.

Table 4.7 Estimate of water and sewerage bill (Yearly)

				Min. value across all companies	Max. value across all companies
£1 - £99	2%	2%	1%	0%	7%
£100 - £199	9%	9%	7%	3%	23%
£200 - £299	19%	19%	10%	9%	28%
£300 - £399	31%	31%	28%	16%	46%
£400 - £499	23%	22%	32%	7%	33%
£500 - £599	6%	6%	9%	1%	15%
£600 - £699	5%	5%	7%	3%	17%
£700 - £799	2%	2%	4%	0%	7%
£800 - £899	1%	1%	1%	0%	4%
£900 - £999	1%	1%	*%	0%	5%
£1000+	2%	2%	1%	0%	8%
Total	100.0	100.0	100.0		
Base	3369	3022	347		

* non-zero but less than 0.5%

4.7.3 Estimates of the water bill by different customer segments are illustrated in Table 4.8. Just over one fifth (21%) of customers who opted for a water meter estimated their water bill at £400 or more, compared with 36% of those on a meter for other reasons, and 47% of those not on a water meter. The proportion of customers who stated that their bill was £400 or more rose from 26% of those in a one person household, to 42% of those in a two person household, and 51% in a three-plus person household.

Table 4.8 Estimate of water and sewerage bill – by Water meter / Household income / Household size

	Water meter?			Household Income					Household size		
	Opted	Other	No	<10k	10-20k	20k-30k	30k +	DK	1	2	3+
£1 - £199	28%	16%	7%	16%	11%	14%	7%	11%	22%	10%	7%
£200 - £299	28%	19%	15%	24%	19%	13%	14%	18%	25%	18%	14%
£300 - £399	25%	28%	30%	29%	29%	33%	30%	28%	28%	29%	29%
£400 - £499	10%	20%	24%	16%	19%	22%	25%	23%	14%	22%	25%
£500 - £699	6%	10%	15%	9%	16%	10%	16%	13%	8%	13%	16%
£700 - £899	3%	3%	4%	3%	3%	4%	4%	4%	2%	4%	5%
£900+	2%	3%	4%	2%	3%	5%	4%	4%	2%	3%	5%
Base	501	612	2165	638	617	362	572	1180	791	1240	1336

4.7.4 Only those customers who felt able to provide an estimate of their bill were asked the remaining questions in Section 4.7, and 4.8. Therefore smaller sub-sample sizes apply, and should be considered when interpreting the results.

4.7.5 Customers were asked how confident they were that they had estimated their bill(s) accurately. Table 4.9 illustrates that, overall, 61% of customers were "fairly" confident that they had estimated their bill correctly, and a further 12% were "very" confident. However, one fifth (20%) were not very confident, and 5% were not at all confident.

Table 4.9 Confidence in estimate of bill

				Min. value across all companies	Max. value across all companies
Not at all confident	5%	6%	1%	0%	23%
Not very confident	20%	20%	22%	11%	38%
Fairly confident	61%	60%	71%	37%	74%
Very confident	12%	12%	6%	5%	28%
Don't know	2%	3%	1%	0%	13%
Total	100.0	100.0	100.0		
Base	3369	3022	347		

4.7.6 Customers of Cambridge Water/Anglian (88%) and Severn Trent Water (86%) were most confident that they had estimated their bills accurately (e.g. "fairly"/"very" confident), whereas customers of water and sewerage services in the Bristol region (49%) and Yorkshire Water (47%) were least confident that they had estimated their bills accurately (e.g. "not at all"/"not very" confident).

4.7.7 Confidence in the bill estimate varied by customer segment, as shown in Table 4.10. More than eight in ten (81%) customers who had opted for a water meter were confident (e.g. "very" / "fairly") that they had estimated their bill accurately, compared with 76% of those on a water meter for other reasons, and 69% of customers who were not on a water meter.

Table 4.10 Confidence in estimate of bill – by Meter / Household income / Household size

	Water meter?			Household Income					Household size		
	Opted	Other	No	<10k	10-20k	20k-30k	30k +	DK	1	2	3+
Not at all confident	4%	4%	7%	8%	7%	10%	7%	4%	6%	6%	6%
Not very confident	15%	18%	22%	21%	19%	20%	19%	20%	18%	20%	20%
Fairly confident	61%	60%	57%	52%	57%	55%	60%	62%	55%	59%	59%
Very confident	20%	16%	12%	16%	16%	12%	12%	12%	17%	13%	12%
Don't know	1%	3%	3%	4%	2%	3%	2%	3%	4%	2%	3%
Base	501	612	2165	638	617	362	572	1180	791	1240	1336

4.8 Value for money of current water and sewerage services (asked only of those who were able to give an estimate of their bill level')

4.8.1 Those customers who felt they were able to give an estimate of their correct bill level were asked to rate their current water and sewerage services (combined) in terms of value for money. The results are reported for customers in England and Wales (combined and separately) in Table 4.11.

Table 4.11 Value for money of company's current service (water and sewerage combined)

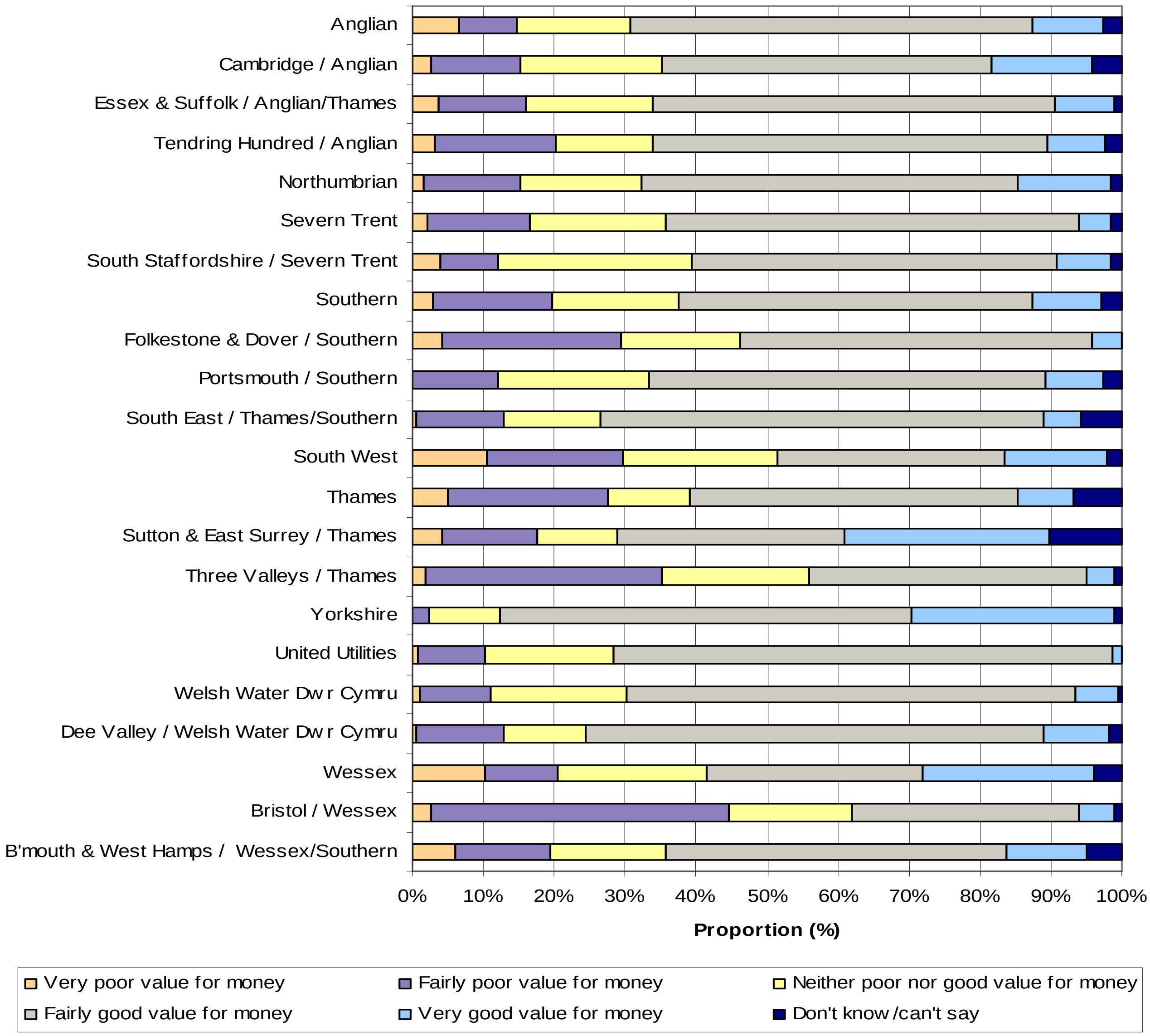
				Min. value across all companies	Max. value across all companies
Very poor value for money	3%	3%	1%	0%	10%
Fairly poor value for money	14%	14%	10%	2%	42%
Neither poor / good value for money	17%	17%	19%	10%	27%
Fairly good value for money	55%	55%	64%	31%	70%
Very good value for money	9%	9%	6%	1%	29%
Don't know / can't say	2%	2%	1%	0%	10%
Total	100.0	100.0	100.0		
Base	3369	3302	347		

4.8.2 Almost two thirds (64%) of customers, overall, think their current service offers "fairly" or "very" good value for money, 17% of customers consider their current service to offer "fairly" or "very" poor value for money. The same proportion stated it is neither poor nor good value for money (17%).

4.8.3 A higher proportion of customers in Wales stated that their current service offers "fairly" good value for money (64%) compared to England (55%) and a lower proportion stated it offers very/fairly poor value for money (11% Wales, 17% England). Furthermore, the distribution of perceived bill levels for Wales customers was higher than for England customers.

4.8.4 Figure 4.2 illustrates that the greatest variation in perceived value for money was amongst customers of water and sewerage services in the Bristol region where more people considered the service (combined) to offer poor value for money (42%) than good value for money (37%), Three Valleys Water/Thames (43% good value for money, 35% poor value for money) and South West Water (47% good value for money, 30% poor value for money).

Figure 4.2 Perceived value for money of current service (water and sewerage combined) by company



4.8.5 There was a small variation in the perceived value for money across different customer segments, as illustrated in Table 4.12.

Table 4.12 Value for money of company's current service (water and sewerage combined) – by Water meter / Household income

	Water meter?			Household Income				
	Opted	Other	No	<10k	10-20k	20k-30k	30k +	DK
Very poor value for money	3%	3%	4%	4%	3%	3%	3%	3%
Fairly poor value for money	12%	15%	16%	18%	18%	17%	13%	13%
Neither poor / good value for money	18%	17%	18%	15%	14%	18%	18%	20%
Fairly good value for money	51%	52%	51%	48%	49%	50%	54%	52%
Very good value for money	15%	11%	9%	13%	13%	10%	10%	8%
Don't know / can't say	1%	2%	2%	2%	2%	2%	2%	3%
Base	501	612	2165	638	617	362	572	1180

4.8.6 Customers who thought that their current water and sewerage services were **poor** value for money were asked the reasons why. Table 4.13 shows that the main reason that customers thought that their current water and sewerage services were poor value for money was that it is too expensive already (72%).

4.8.7 The proportion of customers who stated that the main reason their current water and sewerage services are poor value for money was that 'it is too expensive already' varied from 28% (Wessex Water) to 92% (Tendring Hundred/Anglian, Three Valleys Water/Thames and United Utilities).

Table 4.13 Reasons the current water and sewerage service (combined) are poor value for money

				Min. value across all companies	Max. value across all companies
I don't value the service	4%	3%	10%	0%	14%
Not worth the money	9%	9%	14%	0%	50%
Too expensive already	72%	72%	71%	28%	92%
Cannot afford it	3%	3%	0%	0%	17%
Oppose paying so much for a natural resource	3%	3%	1%	0%	10%
Oppose paying so much to companies who make large profits	3%	3%	0%	0%	25%
Oppose paying more to companies when so much water is lost in leakage	3%	3%	1%	0%	9%
Only person living in the property	1%	1%	0%	0%	4%
Other	3%	3%	5%	0%	11%
Don't know / can't say	*%	*%	0%	0%	6%
Total	100.0	100.0	100.0		
Base	628	587	41		

4.8.8 Customers who thought that their current water and sewerage services were **good** value for money were asked the reasons why. Table 4.14 illustrates that the main reasons were: that the bill is affordable (42%), they value the service (30%) and the service is worth the money (25%).

Table 4.14 Reasons the current water and sewerage service (combined) are good value for money

				Min. value across all companies	Max. value across all companies
I value the service	30%	30%	20%	10%	71%
Service is worth the money	25%	26%	12%	5%	42%
Bill is affordable	42%	40%	68%	8%	69%
Other	*%	*%	0%	0%	2%
Don't know / can't say	4%	4%	*%	0%	22%
Total	100.0	100.0	100.0		
Base	2068	1820	248		

* non-zero but less than 0.5%

4.8.9 The proportion of customers who stated that the main reason their current water and sewerage services (combined) are good value for money was that the bill is affordable varied from 8% (Portsmouth Water/Southern and the Bristol region) to 69% (Welsh Water Dŵr Cymru). The proportion of customers who stated that the main reason their current water and sewerage services (combined) are good value for money was because they value the service ranged from 10% (United Utilities) to 71% (Portsmouth Water/Southern).

4.8.10 Table 4.15 shows that just over one-third (34%) of customers in socio-economic group A/B thought that the current service level offered good value for money because the service is considered to be of good quality; and an almost similar proportion (34%) thought it offered good value for money because the bill is affordable. In contrast, amongst D/E customers, the perception that the bill was affordable was the most frequently given reason for thinking that the service offered good value for money (45%) compared to just 30% whose reason was because they valued the service.

Table 4.15 Reasons the current water and sewerage service (combined) are good value for money – by SEG

	Socio-economic group		
	A/B	C1/C2	D/E
I value the service	35%	31%	30%
Service is worth the money	26%	23%	22%
Bill is affordable	34%	41%	45%
Other	1%	0%	0%
Don't know / can't say	3%	4%	3%
Base	422	925	702

4.9 Approach to paying bills

4.9.1 Customers who were responsible for paying their bill(s) for water and sewerage services were asked what best described their approach to paying. Table 4.16 shows that the majority (85%) of customers do not find it difficult to pay their water and sewerage bill(s) on time. However, 11% stated that they usually pay on time but it can be difficult.

Table 4.16 Approach to paying water and sewerage bill(s) (combined)

				Min. value across all companies	Max. value across all companies
I don't find it difficult to pay on time	85%	84%	93%	65%	93%
I usually pay on time but it can be difficult	11%	12%	6%	4%	28%
I sometimes pay late depending on what other bills I have to pay	2%	2%	1%	0%	8%
I often find it a challenge and have to delay payments as long as possible	*%	*%	0%	0%	2%
I don't usually pay my bills on time	*%	*%	0%	0%	2%
Don't know / can't say	1%	2%	1%	0%	5%
Total	100.0	100.0	100.0		
Base	5701	5178	523		

* non-zero but less than 0.5%

4.9.2 At a company level, the proportion of customers who stated that they do not find it difficult to pay on time ranged from 65% (Portsmouth Water/Southern and Wessex Water) to 93% (Thames Water, Tendring Hundred/Anglian and Welsh Water Dŵr Cymru). Conversely, the proportion of customers who stated that they usually pay on time but it can be difficult was highest amongst Portsmouth Water/Southern customers (28%) and lowest amongst Thames Water (4%) and Tendring Hundred/Anglian (4%) customers.

4.9.3 Table 4.17 shows that a higher proportion of customers in socio-economic group A/B stated that they don't find it difficult to pay their bill on time (89%), compared with 84% in groups C1/C2, and 75% in groups D/E. Conversely, the proportion of customers who stated that they usually pay on time but it can be difficult was highest amongst D/E customers (17%), compared with 12% in groups C1/C2, and 8% in groups A/B.

4.9.4 The proportion of customers who stated that they do not find it difficult to pay their bills on time increased with household income. A higher proportion of customers on a water meter (opted for a meter 88%, on meter for other reasons 86%) stated that they do not find it difficult to pay their bills on time, compared to customers not on a water meter (81%).

Table 4.17 Approach to paying water and sewerage bill(s) – by SEG / Water meter / Household income

	SEG			Household Income					Water meter?		
	A/B	C1/C2	D/E	< 10k	10-20k	20k-30k	30k +	DK	Opted	Other	No
I don't find it difficult to pay on time	89%	84%	75%	70%	77%	86%	93%	70%	88%	86%	81%
I usually pay on time but it can be difficult	8%	12%	17%	22%	17%	11%	5%	22%	9%	10%	14%
I sometimes pay late depending on what other bills I have to pay	1%	2%	4%	5%	4%	2%	1%	5%	2%	2%	3%
I often find it a challenge and have to delay payments as long as possible	1%	0%	1%	1%	0%	1%	0%	1%	0%	0%	0%
I don't usually pay my bills on time	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	1%	1%	2%	2%	1%	1%	1%	2%	1%	2%	1%
Base	1,203	2,551	1,863	1,023	989	572	954	2,163	811	1,001	3,666

4.10 Contact with the water / water and sewerage company

4.10.1 Customers were asked whether or not they, or any member of their household, had been in contact with their local water, or water and sewerage, company other than to pay the bill. Table 4.18 highlights that 6% of customers had contacted their water and sewerage company(ies) within the last 12 months.

4.10.2 Customers of Folkestone & Dover/Southern (13%) and South East/Southern (12%) were most likely to have contacted their local water or water and sewerage company(ies) and customers of Bournemouth & West Hampshire/Southern (4%) and Three Valleys/Thames (4%) were least likely.

Table 4.18 Contact with water and sewerage company(ies) (other than to pay a bill)

				Min. value across all companies	Max. value across all companies
Yes	6%	7%	5%	4%	13%
No	92%	92%	95%	85%	95%
Don't know / can't say	2%	2%	*%	0%	6%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

4.10.3 Of those customers who had contacted their water and sewerage company(ies) (n=434), Table 4.19 reports that the main reason was for a general enquiry (37%), to make a complaint (28%) or to report a problem (23%).

Table 4.19 Reason for contacting water and sewerage company(ies)

				Min. value across all companies	Max. value across all companies
To make a complaint	28%	28%	26%	5%	65%
General enquiry	37%	37%	31%	7%	68%
Request for information	12%	12%	8%	0%	31%
To report a problem	23%	23%	29%	0%	52%
To obtain a water meter	4%	4%	6%	0%	17%
Payment issue – not specified	1%	1%	0%	0%	5%
To report a change of address	2%	2%	0%	0%	8%
To make an enquiry on the billing	*%	*%	0%	0%	8%
Other	1%	1%	0%	0%	7%
Can't remember	3%	4%	0%	0%	27%
Total	100.0	100.0	100.0		
Base	434	404	30		

* non-zero but less than 0.5%

4.10.4 Customers of Southern Water (65%) and United Utilities (47%) were most likely to have contacted their water company(ies) to make a complaint, whereas customers of Dee Valley Water/Welsh Water Dŵr Cymru (6%) and Thames Water (5%) were least likely. A higher proportion of customers from Cambridge Water/Anglian (52%) and Severn Trent Water (40%) had contacted their water company to report a problem, compared to other companies.

4.11 Acceptability of water and sewerage service proposals in companies DBP – Uninformed View

4.11.1 Customers were presented with a very brief description (Appendix A) of proposed new service levels for 2010-15 and the combined water and sewerage bill increase (to mirror the likely limited level of information people will receive in reality – therefore a relatively uninformed view). It should be noted that customers were given combined bill increase even where water and sewerage services are provided by separate companies.

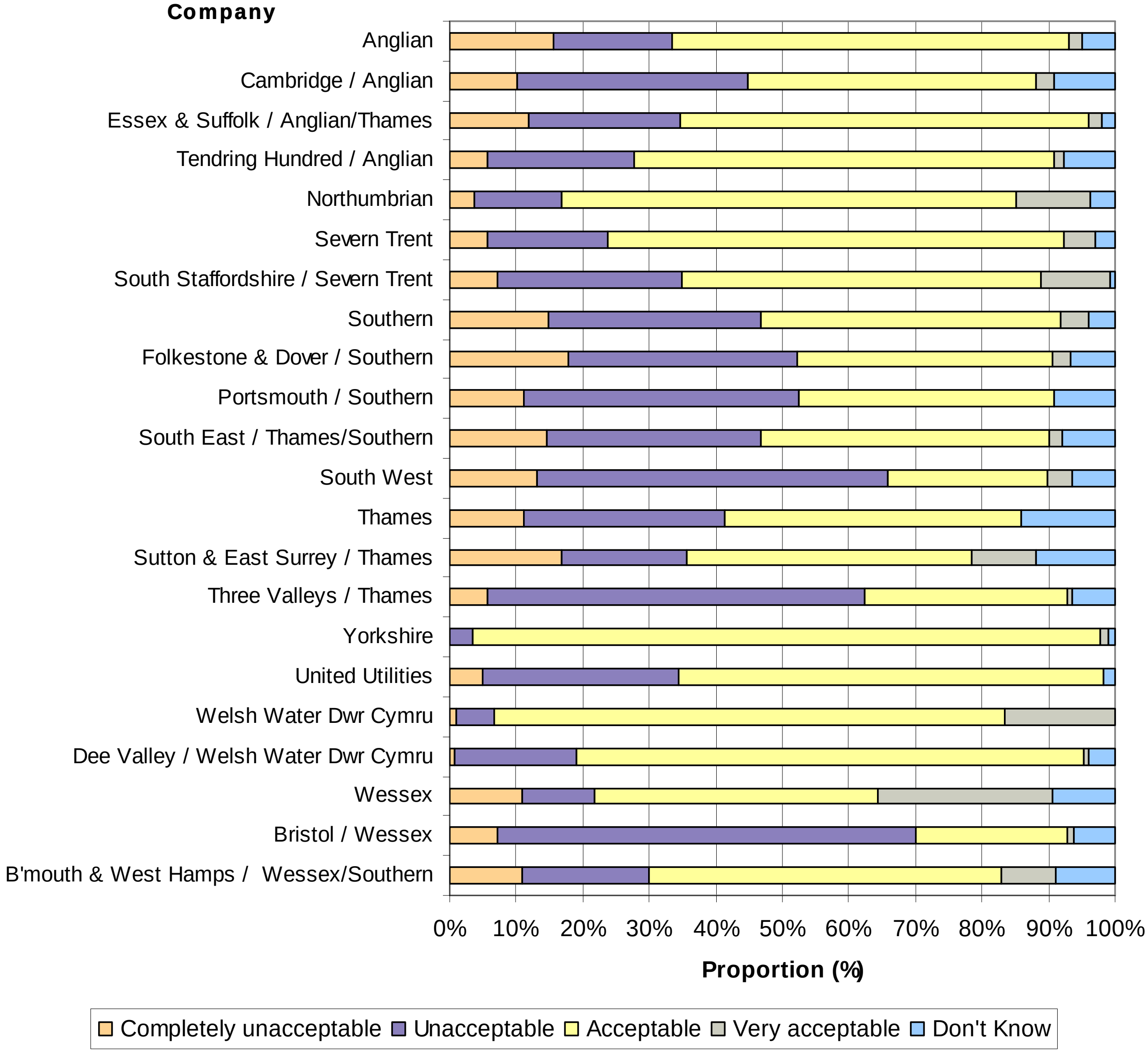
4.11.2 Table 4.20 shows that 58% of customers considered their company(ies)' combined water and sewerage plans acceptable, and a further 4% found it very acceptable. However, one quarter (25%) considered the combined water and sewerage plan unacceptable, and a further 8% found it completely unacceptable. Customers in Wales were significantly more willing to accept their company's DBP (92% acceptable/very acceptable) than their counterparts in England (60%).

Table 4.20 Acceptability of DBP (water and sewerage combined) Uninformed

				Min. value across all companies	Max. value across all companies
Completely unacceptable	8%	8%	1%	0%	18%
Unacceptable	25%	26%	7%	3%	63%
Acceptable	58%	57%	77%	23%	94%
Very acceptable	4%	3%	15%	0%	26%
Don't know / can't say	5%	6%	1%	0%	14%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

4.11.3 Customers attitudes to the separate water or sewerage proposals appear to be influenced by their views of the combined bill increase. This is an important factor to consider when looking at the company results. Figure 4.3 shows acceptance of the DBP (water and sewerage) at a company level. Acceptance was highest amongst customers of Yorkshire Water (95% "very"/"fairly" acceptable, +£4) and Welsh Water Dŵr Cymru (93%, -£2), and lowest amongst customers of water and sewerage services in the Bristol region (24% "very"/"fairly" acceptable, +£40) and South West Water (28%, +£34).

Figure 4.3 Acceptability of DBP (water and sewerage combined) Uninformed by Company



4.11.4 Table 4.21 shows that acceptance of combined DBPs was highest amongst customers in socio-economic group A/B (62%), followed by those in group C1/C2 (59%), and those in group D/E (54%). Acceptance of the combined DBP increased with household income.

Table 4.21 Acceptability of DBP (water and sewerage combined) Uninformed – by SEG / Household income

	SEG			Household Income				
	A/B	C1/C2	D/E	< 10k	10-20k	20k-30k	30k +	DK
Completely unacceptable	8%	9%	10%	11%	10%	6%	6%	10%
Unacceptable	24%	27%	29%	28%	29%	29%	25%	26%
Acceptable	57%	53%	50%	50%	51%	53%	57%	53%
Very acceptable	5%	6%	4%	4%	6%	8%	7%	4%
Don't know	5%	5%	7%	6%	4%	4%	4%	8%
Base	1,271	2,749	2,603	1,152	1,058	603	1,004	2,358

4.11.5 Just over four in ten customers (42%) who had had a negative experience/cause to complain to their water company(ies) stated that they thought the combined DBP was acceptable ("very"/fairly") compared to 58% of customers who had not had cause to complain.

4.11.6 A higher proportion of customers' who rated the environment (60%) and cost of living (60%) as 'very important', stated that they thought the combined DBP was acceptable ("very"/fairly") compared to other customers (56%, 55% respectively).

4.11.7 Table 4.22 shows that customers were more accepting of combined plans with lower bill impact/percentage bill change.

Table 4.22 Acceptability of DBP (water and sewerage combined) Uninformed – by Bill Impact / % bill change

	Overall bill impact			Overall bill % change		
	£20 or less	£21 - £49	£50+	5% or less	6 – 15%	16% +
Completely unacceptable	6%	9%	15%	6%	9%	14%
Unacceptable	14%	39%	32%	14%	38%	32%
Acceptable	67%	44%	42%	68%	45%	43%
Very acceptable	9%	2%	4%	9%	3%	3%
Don't know	4%	7%	7%	3%	6%	9%
Base	2,546	2,239	1,390	2,330	2,152	1,693

5 Informed Views on Current Service

5.1 Description of the Current Service and Bill level

5.1.1 This chapter explores customers' **informed** views on their current service level and costs, and whether this offers good or poor value for money. Prior to providing their 'informed' view, customers were presented with show material that listed, and described, the existing water and sewerage service in terms of the individual aspects below (an example set of show cards is included in Appendix B):

Water Service

- Maintain water pipes, treatment works and reservoirs
- Ensure a reliable and continuous water supply
- Ensure the safety of tap water - drinking water quality
- Manage the appearance, taste and smell of tap water
- Manage the pressure of water in your taps and the number of unplanned interruptions
- Handle customers' accounts, queries, complaints and customers with special needs
- Ensure companies manage their critical water treatment works and pipes to deal with extreme events e.g. severe weather
- Manage the amount of water taken from the environment to supply customers

Sewerage Service

- Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works
- Ensure a reliable and continuous sewerage service for the removal and treatment of sewage
- Avoid risk of homes being flooded with sewage
- Avoid risk of properties being flooded with sewage outside the home
- Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather
- Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast

5.1.2 In addition to describing the individual service aspects and associated bill impacts, customers were also advised of the average bill level for water, separately, sewerage and combined water and sewerage services in their area.

5.1.3 It should be noted that when examining the views on current sewerage services levels, customers in WoC areas have been asked their views on the sewerage service provided by the relevant WaSC(s) serving their area.

5.2 Summary findings

61% of customers stated that the current water service was good value for money, 60% stated the current sewerage service was good value for money, and 59% felt that their current service overall (water and sewerage combined) was good value for money. The main reasons that customers felt that the current service (overall) offered good value for money was that the bill was affordable (41%), they valued the service (33%) and the service was worth the money (22%).

17% of customers stated that the current water service was poor value for money, 17% stated the current sewerage service was poor value for money, and 16% felt that their current service overall (water and sewerage combined) was poor value for money. The main reasons that customers felt the current service (overall) offered poor value for money were that it was too expensive already (70%) and it was not worth the money (11%).

Value for money of the current water and sewerage services (separately and combined) varied across companies.

The greatest proportion of customers perceiving "fairly" or "very" good value for money of the current water, sewerage and overall service were customers of Yorkshire Water and Welsh Water Dŵr Cymru. The lowest proportion of customers perceiving "fairly" or "very" good value the value for money of the water, sewerage and overall service were customers of Three Valleys Water/Thames, the Bristol region and Portsmouth Water/Southern.

The proportion of customers that rated the value for money of the current water, sewerage, and overall service they received as "fairly" or "very" good increased with household income.

A higher proportion of customers who had a better awareness/understanding of their company(ies) responsibilities rated the value for money of the water, sewerage and overall current service they received as "fairly" or "very" good, compared to customers with less awareness/understanding. Customers who had had a negative experience or reason to complain were less positive about the value for money of the water, sewerage and overall current service they received. Customers who were more confident that they had estimated their water bill accurately were more positive about the value for money of the water, sewerage and overall current service they received.

The provision of information showing all the different aspects of service, and average bill level, has led to a (slight) drop in the number of customers who consider their overall service to offer good value for money.

5.3 Value for money of the current water service

5.3.1 Bearing in mind these current services levels, customers were asked how they rate the **water** service in terms of value for money. Table 5.1 shows that 53% thought that the current water service offers "fairly" good value for money, and a further 8% thought it offers "very" good value for money. 14% of customers thought that the current water service offers "fairly" poor value for money, and 3% thought it offered "very" poor value for money. Just under one fifth (19%) thought it was neither poor nor good value for money.

Table 5.1 Value for money of the water service

				Min. value across all companies	Max. value across all companies
Very poor value for money	3%	3%	1%	0%	8%
Fairly poor value for money	14%	14%	4%	2%	28%
Neither poor / good value for money	19%	19%	18%	5%	33%
Fairly good value for money	53%	52%	72%	32%	73%
Very good value for money	8%	8%	5%	2%	32%
Don't know / can't say	4%	4%	*%	0%	14%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

5.3.2 Customers in Wales are considerably more positive about the value for money of the water service they receive (77% "fairly" or "very" good) than customers in England (61%).

5.3.3 Value for money of the current water service varied across companies. A higher proportion of customers of Yorkshire Water (91%) and Welsh Water Dŵr Cymru (78%) rated the value for money of the water service they received as "fairly" or "very" good, compared to 35% of customers of Three Valleys Water and Bristol Water.

5.3.4 Table 5.2 highlights that the proportion of customers that rated the value for money of the water service they received as "fairly" or "very" good increased with household income.

Table 5.2 Value for money of the water service – by Household income / Household size

	Household Income					Household Size		
	< 10k	10-20k	20k-30k	30k +	DK	1	2	3+
Very poor value for money	3%	3%	2%	2%	3%	3%	3%	3%
Fairly poor value for money	16%	16%	17%	12%	13%	14%	15%	15%
Neither poor / good value for money	20%	20%	15%	19%	21%	20%	21%	19%
Fairly good value for money	48%	48%	52%	54%	49%	48%	49%	51%
Very good value for money	9%	12%	10%	10%	7%	11%	10%	8%
Don't know / can't say	4%	2%	4%	2%	6%	4%	3%	5%
Base	1,152	1,058	603	1,004	2,358	1,409	2,293	2,466

5.3.5 A higher proportion of customers who thought that the environment (60%), cost of living (60%) and water and sewerage services (60%) were "very important" rated the value for money of the water service they received as "fairly" or "very" good, compared to other customers (57% environment, 55% cost of living, 57% water and sewerage services).

5.3.6 Table 5.3 illustrates that a higher proportion of customers that had a better awareness/understanding of their company(ies) responsibilities of their water company(ies) rated the value for money of the water service they received as "fairly" or "very" good, compared to customers with less awareness/understanding. Customers who had had a negative experience or reason to complain were less positive about the value for money of the water service they received. Customers who were more confident that they had estimated their water bill accurately were more positive about the value for money of the water service they received.

Table 5.3 Value for money of the water service – by awareness/understanding of company(ies) responsibilities / confidence in bill estimate and whether or not the customer has had a negative experience

	Awareness/ understanding			Confidence in bill estimate					Complain / negative experience	
	Good	Fair	Poor	Not at all confident	Not very confident	Fairly confident	Very confident	Don't know	No	Yes
Very poor vfm	3%	3%	3%	8%	4%	2%	3%	4%	3%	6%
Fairly poor vfm	14%	13%	18%	38%	19%	13%	12%	13%	14%	18%
Neither poor / good vfm	17%	22%	21%	17%	17%	22%	16%	24%	20%	23%
Fairly good vfm	54%	50%	43%	26%	50%	55%	47%	37%	50%	44%
Very good vfm	9%	9%	11%	6%	7%	6%	20%	13%	9%	4%
Don't know	3%	4%	5%	3%	3%	2%	2%	8%	4%	4%
Base	2,090	2,461	1,624	208	662	1,955	454	90	5,969	206

5.4 Value for money of the current sewerage service

5.4.1 Customers were asked how they rate the **sewerage** service in terms of value for money. Table 5.4 highlights that 50% thought that the current sewerage service offers "fairly" good value for money, and a further 10% thought it offers "very" good value for money. 14% of customers thought that the current sewerage service offers "fairly" poor value for money, and 3% thought it offered "very" poor value for money. One fifth (20%) thought it was neither poor nor good value for money.

Table 5.4 Value for money of current sewerage service

				Min. value across all companies	Max. value across all companies
Very poor value for money	3%	3%	1%	0%	8%
Fairly poor value for money	14%	14%	4%	2%	29%
Neither poor / good value for money	20%	20%	18%	5%	32%
Fairly good value for money	50%	49%	72%	27%	72%
Very good value for money	10%	11%	6%	2%	40%
Don't know / can't say	4%	4%	*%	0%	14%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

5.4.2 As with their perception of water service received, customers in Wales are considerably more positive (in terms of value for money) about their sewerage service they receive (77% "fairly" or "very" good) than customers in England (61%).

5.4.3 The greatest proportion of customers perceiving "fairly" or "very" good value for money of the current water, sewerage and overall service were customers of Yorkshire Water and Welsh Water Dŵr Cymru. The lowest proportion of customers perceiving "fairly" or "very" good value the value for money of the water, sewerage and overall service were customers of Three Valleys Water/Thames, the Bristol region and Portsmouth Water/Southern.

5.4.4 Table 5.5 highlights that the proportion of customers that rated the value for money of the sewerage service they received as "fairly" or "very" good increased with household income. There were no statistically significant differences for perceived value for money by household income for the separate England and Wales samples.

Table 5.5 Value for money of current sewerage service – by Household income / SEG

	Household Income					SEG		
	< 10k	10-20k	20k-30k	30k +	DK	A/B	C1/C2	D/E
Very poor value for money	4%	3%	2%	2%	3%	4%	3%	3%
Fairly poor value for money	18%	15%	17%	14%	14%	13%	15%	16%
Neither poor / good value for money	19%	21%	15%	19%	22%	17%	20%	22%
Fairly good value for money	44%	45%	51%	52%	46%	51%	47%	44%
Very good value for money	12%	13%	10%	11%	9%	11%	10%	11%
Don't know / can't say	4%	2%	4%	2%	6%	4%	4%	5%
Base	1,152	1,058	603	1,004	2,358	1,271	2,749	2,063

It should be noted that a large proportion of customers did not know/refused to give their household income

5.4.5 A higher proportion of customers who thought that the environment (59%), cost of living (59%) and water and sewerage services (59%) were "very important" rated the value for money of the sewerage service they received as "fairly" or "very" good, compared to other customers (55% environment, 54% cost of living, 56% water and sewerage services).

5.4.6 Table 5.6 highlights that a higher proportion of customers that had a better awareness/understanding of their company(ies) responsibilities rated the value for money of the sewerage service they received as "fairly" or "very" good, compared to customers with less awareness/understanding. Customers who had had a negative experience or reason to complain were less positive about the value for money of the sewerage service they received. Customers who were more confident that they had estimated their water and sewerage bill accurately were more positive about the value for money of the sewerage service they received.

Table 5.6 Value for money of the sewerage service – by awareness/understanding of company(ies) responsibilities / confidence in bill estimate and whether or not the customer has had a negative experience

	Awareness/ understanding			Confidence in bill estimate					Complain / negative experience	
	Good	Fair	Poor	Not at all confident	Not very confident	Fairly confident	Very confident	Don't know	No	Yes
Very poor vfm	3%	3%	3%	7%	4%	2%	5%	0%	3%	9%
Fairly poor vfm	15%	13%	17%	38%	18%	13%	16%	14%	15%	18%
Neither poor / good vfm	17%	22%	20%	16%	19%	22%	15%	28%	20%	21%
Fairly good vfm	51%	47%	40%	26%	47%	53%	42%	38%	47%	41%
Very good vfm	9%	10%	13%	9%	9%	7%	20%	11%	11%	7%
Don't know	4%	4%	6%	3%	2%	3%	2%	9%	4%	4%
Base	2,090	2,461	1,624	208	662	1,955	454	90	5,969	206

5.5 Value for money of the current service overall

5.5.1 Customers were asked how they rate the **overall** service in terms of value for money. Table 5.7 highlights that 52% thought that the overall current service offers "fairly" good value for money, and a further 7% thought it offers "very" good value for money. 13% of customers thought that the overall current service offers "fairly" poor value for money, and 3% thought it offered "very" poor value for money. Just over one fifth (22%) thought it was neither poor nor good value for money.

Table 5.7 Value for money of overall current service

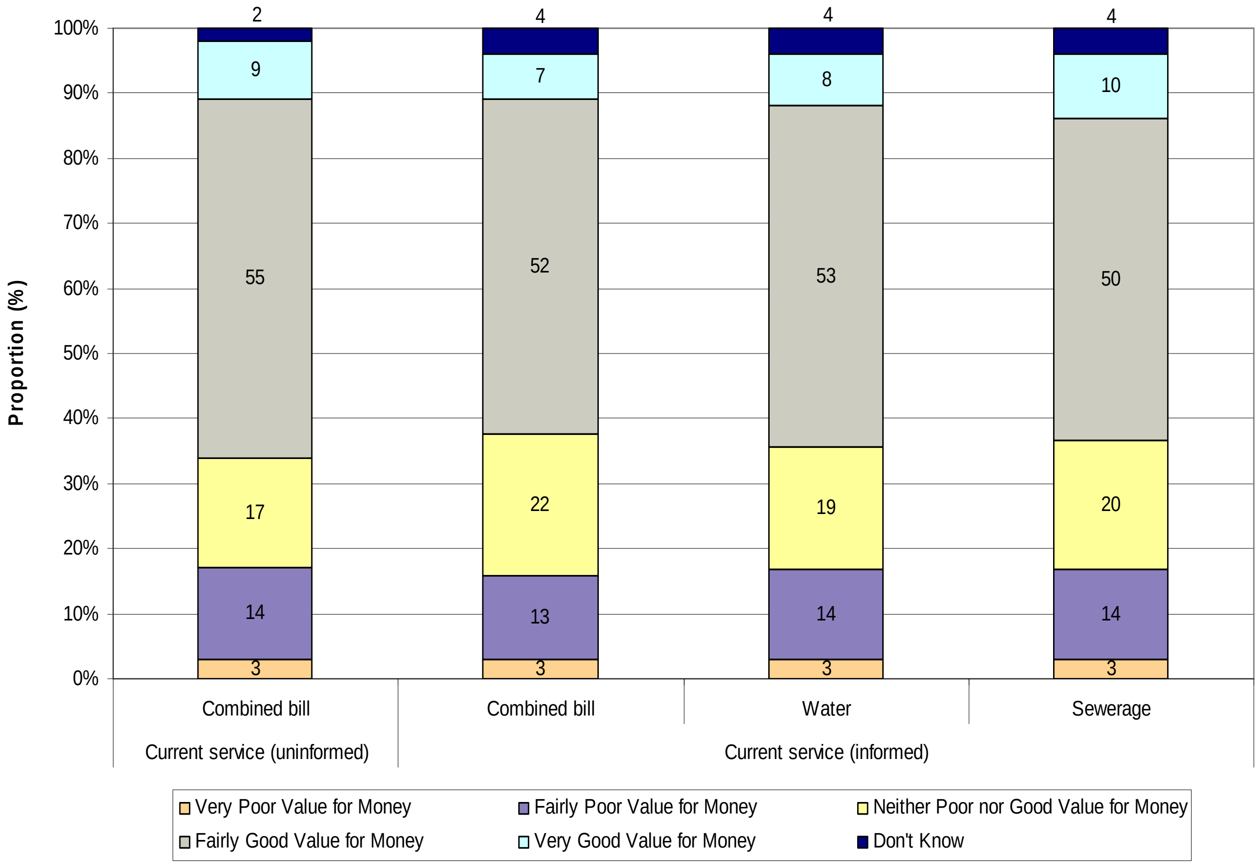
				Min. value across all companies	Max. value across all companies
Very poor value for money	3%	3%	1%	0%	8%
Fairly poor value for money	13%	14%	4%	2%	32%
Neither poor / good value for money	22%	22%	18%	6%	31%
Fairly good value for money	52%	51%	73%	29%	74%
Very good value for money	7%	7%	4%	2%	24%
Don't know / can't say	4%	4%	*%	0%	14%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

5.5.2 Since the **PR04** research, there has been a slight increase in the proportion of customers who consider their overall service to offer good value for money (from 55% to 59%), and a slight decrease in the proportion who thought that the overall current service offers poor value for money (from 18% to 16%).

5.5.3 Figure 5.1 illustrates a comparison of value for money from the uninformed (Chapter 4) to the informed view. The proportion of customers who thought that the overall current service offers "very"/"fairly" good value for money has decreased from 64% (uninformed) to 59% (informed). The provision of information showing all the different aspects of service, and average bill level, has led to a (slight) drop in the number of customers who consider their overall service to offer good value for money, although this was not the case across all companies (see paras 5.5.4-5.5.6).

Figure 5.1 Value for money of current service: Uninformed Vs Informed



5.5.4 Value for money of the current water and sewerage services (separately and combined) varied across companies. More than half of customers in every company said the combined services (water and sewerage) were fairly or very good value for money, with the exception of Folkestone and Dover/Southern (48%), Cambridge/Anglian (44%); South West Water (37%), Portsmouth Water/Southern (36%), the Bristol region (35%), Three Valleys Water/Thames (31%).

5.5.5 A higher proportion of customers of Yorkshire Water (91%) and Welsh Water Dŵr Cymru (78%) rated the value for money of the overall service they received as "fairly" or "very" good, compared to 31% of customers of Three Valleys Water/Thames, 35% of customers of water and sewerage services in the Bristol region and 36% of Portsmouth Water/Southern customers.

5.5.6 Across five companies, the proportion of customers who considered their current service overall (water and sewerage combined) to be good value for money increased from the uninformed view. These were: Yorkshire Water (87% to 91%); Welsh Water Dŵr Cymru (69% to 78%); Severn Trent Water (63% to 67%); Sutton and East Surrey Water/Thames Water (61% to 63%); and Wessex Water (55% to 59%). The proportion who rated the current service as good value for money remained the same for customers of Northumbrian Water (66% uninformed and informed) and South Staffordshire Water/Severn Trent Water (59% uninformed and informed).

5.5.7 Table 5.8 highlights that the proportion of customers that rated the value for money of the overall service they received as "fairly" or "very" good increased with household income.

Table 5.8 Value for money of overall current service – by Household income

	Household Income				
	< 10k	10-20k	20k-30k	30k +	DK
Very poor value for money	4%	3%	3%	2%	3%
Fairly poor value for money	16%	16%	16%	13%	13%
Neither poor / good value for money	23%	23%	19%	22%	23%
Fairly good value for money	45%	47%	51%	52%	48%
Very good value for money	8%	9%	8%	9%	6%
Don't know / can't say	4%	2%	3%	2%	6%
Base	1,152	1,058	603	1,004	2,358

5.5.8 A higher proportion of customers who thought that the environment (58%), cost of living (58%) and water and sewerage services (58%) were "very important" rated the value for money of the overall current service they received as "fairly" or "very" good, compared to other customers (52% environment, 51% cost of living, 53% water and sewerage services).

5.5.9 Table 5.9 highlights that a higher proportion of customers who had a better awareness/understanding of their company(ies) responsibilities rated the value for money of the overall current service they received as "fairly" or "very" good, compared to customers with less awareness/understanding. Customers who had had a negative experience or reason to complain were less positive about the value for money of the overall current service they received. Customers who were more confident that they had estimated their water bill accurately were more positive about the value for money of the overall current service they received.

Table 5.9 Value for money of the overall current service – by awareness/understanding of company(ies) responsibilities / confidence in bill estimate and whether or not the customer has had a negative experience

	Awareness/ understanding			Confidence in bill estimate					Complain / negative experience	
	Good	Fair	Poor	Not at all confident	Not very confident	Fairly confident	Very confident	Don't know	No	Yes
Very poor vfm	3%	3%	3%	8%	4%	2%	5%	2%	3%	7%
Fairly poor vfm	14%	13%	17%	38%	18%	13%	15%	19%	14%	18%
Neither poor / good vfm	19%	25%	24%	18%	20%	25%	18%	27%	23%	25%
Fairly good vfm	53%	49%	43%	28%	49%	53%	45%	38%	49%	41%
Very good vfm	8%	7%	9%	4%	6%	5%	16%	7%	8%	4%
Don't know	3%	4%	5%	3%	3%	2%	2%	8%	4%	4%
Base	2,090	2,461	1,624	208	662	1,955	454	90	5,969	206

5.5.10 Customers who thought that the overall current service was **poor** value for money were asked the main reason why. Table 5.10 highlights that 70% thought that it was too expensive already, and 11% thought that it was not worth the money.

Table 5.10 Reason the overall current service is poor value for money

				Min. value across all companies	Max. value across all companies
I don't value the service	4%	4%	1%	0%	18%
Not worth the money	11%	11%	32%	0%	60%
Too expensive already	70%	70%	59%	20%	85%
Cannot afford it	6%	6%	0%	0%	16%
Oppose paying so much for a natural resource	2%	2%	0%	0%	17%
Oppose paying so much to companies who make large profits	5%	5%	0%	0%	19%
Oppose paying more to companies when so much water is lost in leakage	1%	1%	1%	0%	4%
Other	2%	1%	7%	0%	17%
Don't know / can't say	*%	*%	0%	0%	3%
Total	100.0	100.0	100.0		
Base	1070	1033	37		

* non-zero but less than 0.5%

5.5.11 The proportion of customers who thought that the overall service was too expensive already ranged from 20% of Sutton & East Surrey/Thames customers, to 85% of Essex & Suffolk Water/Anglian-Thames, and 84% of Portsmouth Water/Southern customers. It should be noted that only a sub-set of customers were asked this question, which has resulted in small sample sizes.

5.5.12 Table 5.11 shows that there was variation in customers' poor value for money perception across different household incomes.

Table 5.11 Reason the overall current service is poor value for money – by Household income

	Household Income				
	< 10k	10-20k	20k-30k	30k +	DK
I don't value the service	4%	3%	0%	4%	4%
Not worth the money	13%	19%	10%	14%	13%
Too expensive already	69%	70%	85%	63%	70%
Cannot afford it	8%	5%	1%	3%	5%
Oppose paying so much for a natural resource	2%	1%	0%	5%	1%
Oppose paying so much to companies who make large profits	1%	3%	4%	5%	4%
Oppose paying more to water companies when so much water is lost in leakage	0%	0%	0%	3%	1%
Other	3%	1%	0%	1%	1%
Don't know / can't say	0%	0%	0%	1%	1%
Base	224	199	112	154	381

5.5.13 Customers who thought that the overall current service was **good** value for money were asked the main reason why. More than four in ten customers (41%) thought that the bill was affordable, 33% value the service, and 22% thought that the service is worth the money. The proportion of customers who thought that the bill was affordable ranged from 5% of customers of water and sewerage services in the Bristol region, to 59% of Welsh Water Dŵr Cymru customers. There were no significant differences amongst the different customer segments.

Table 5.12 Reason the overall current service is good value for money

				Min. value across all companies	Max. value across all companies
I value the service	33%	33%	31%	14%	67%
Service is worth the money	22%	23%	9%	6%	44%
Bill is affordable	41%	29%	59%	5%	59%
I don't have any problems / complaints about the service	*%	*%	0%	0%	1%
I don't have any choice / a necessity	*%	*%	1%	0%	1%
Its less than my bill	*%	*%	0%	0%	1%
Other	*%	*%	0%	0%	8%
Don't know / can't say	3%	4%	*%	0%	15%
Total	100.0	100.0	100.0		
Base	3462	3047	415		

* non-zero but less than 0.5%

6 Informed Views on the Draft Business Plan

6.1 Description of the Current Service and Bill level

6.1.1 This chapter explores customers' **informed** views on their company's proposed service offering and bill level (according to their DBP), in terms of whether, or not:

- the plan is acceptable;
- the plan offers value for money; and
- there would be cause for concern if the plans, or some elements of it, were delayed.

6.1.2 Prior to providing their 'informed' view, customers were presented with show material that listed, and described, the company(ies) future plans in terms of the same categories of water and sewerage service as previously shown for the current service (set out in Section 5.1), identifying where levels were being maintained or improved. Customers were also advised of the proposed change in the average bill level for water, for sewerage and combined water and sewerage services in their area (Show card B – Appendix B). They were advised that the bill effects did not include inflation.

6.1.3 It should be noted that when examining the views on proposed sewerage services levels, customers in WoC areas have been asked their views on the sewerage service provided by the WaSC(s) who provide the service in their area.

6.1.4 All results reported in this chapter are based on customers' informed views.

6.2 Summary findings

Approximately two-thirds of customers felt that their company's DBP and the impacts on their bill for water services (65%), sewerage services (65%) and the service as a whole (64%) was acceptable. The main reasons being that the plan is affordable, they valued the improvements, and the improvements are worth the money.

However, approximately three in ten customers felt that their company(ies) DBP and the impacts on their bill for water services (31%), sewerage services (29%) and the overall bill (31%) were unacceptable. The main reasons were that it was too expensive already, the customers cannot afford it and that the improvements are not worth the money.

There was a considerable range in level of acceptance for the proposed **water** service levels at company level (26% Bristol Water to 96% Yorkshire Water), and similarly with the proposed **sewerage** service levels (ranging from 31% Thames/Three Valleys Water to 97% Yorkshire Water).

At the uninformed level (Chapter 4), 62% of customers thought that the DBP as a whole was acceptable. However, when informed of detailed service levels and average bill impacts for customers in their area, a slightly higher proportion (64%) considered the proposed combined DBPs to be acceptable.

At a company level, acceptability of the DBP (from the uninformed to informed view) increased slightly for customers of 13 companies, remained the same for five, and decreased for four (Portsmouth Water 39% to 35%, Wessex Water 69% to 67%, Tendring Hundred Water 65% to 63%, and Northumbrian Water 79% to 78%.

Customers whose proposed water/sewerage bill impact and percentage water/sewerage bill change was lowest were most accepting of the water and sewerage services aspects of the DBP[11]. In contrast, there was no positive correlation/relationship between acceptance level and scale of service improvements.

Customers' responses to the water and sewerage services aspects (separately) of the DBP were heavily influenced by their attitude towards the overall DBP package. This needs to be borne in mind when considering, and interpreting, customers' views to the WoC DBPs, especially those WoCs where their DBP (i.e. for the customers' water services) has a small bill impact and the corresponding WaSC's DBP (i.e. for the same customers' sewerage services) has a large bill impact. Similarly, the acceptability of a WaSC's proposed sewerage levels may have been influenced by the proposed water service and bill levels of a WoC when presented together as one overall package.

As with the water and sewerage service components separately, there is much greater support for the DBP amongst Wales customers (93% "acceptable" or "very acceptable") than amongst England customers (63%); and even greater variation at company level (26% Bristol Water to 96% Yorkshire Water).

Acceptability of the water, sewerage and overall services aspects of the DBP increased with household income, and socio-economic group. Similarly, the proportion of customers who rated the value for money of the DBP (water and sewerage services combined) as good value for money ("very"/"fairly") increased with household income. A higher proportion of customers that had a better awareness/understanding of their company(ies) responsibilities thought that the DBP relating to water, sewerage and overall services was acceptable, compared to customers with less awareness/understanding.

Customers were asked to look at each proposed service level, and state if they feel the proposed service level in the DBP offers value for money. Approximately two-thirds of customers felt that each of the service attributes offered "fairly" or "very" good value for money. The service attributes that customers felt offered greatest value for money were ensuring the safety of tap water – drinking water quality (68%), and managing the appearance, taste and smell of tap water (67%). Just over one in ten customers felt that each of the service attributes offered "fairly" or "very" poor value for money.

Approximately half of customers felt that the total water services (52%), sewerage services (54%), and combined services (52%) offered "fairly"/"very" good value for money. Approximately one-fifth of customers, felt that the total water services (21%), sewerage services (20%), and combined services (21%) offered "fairly"/"very" poor value for money. One quarter of customers felt that overall, the total water (25%), sewerage (25%), and combined services (25%) offered neither good nor poor value for money.

[11] a table showing the bill impacts of each company's DBP in provided in Appendix G.

There was a strong inverse correlation between value for money perceived by customers and the size of the bill impact (in absolute or percentage terms). That is, where the proposed bill impact was relatively low, the proportion of customers perceiving that the DBP (or the water, or sewerage, aspects) offered ("very"/"fairly") good value for money was relatively high (compared to those with a higher proposed bill increases).

6.3 Acceptability of water services aspects of the DBP

6.3.1 Customers were given a brief overview of key service areas for water and sewerage levels, and were shown information about proposed future service levels and the proposed bill impacts. They were asked how acceptable they considered their company(ies)' DBP - firstly in relation to **water** services, bearing in mind the other options available to their water company, such as simply maintaining services and complying with legal requirements or improving more services than in the current plan. Table 6.1 illustrates the results.

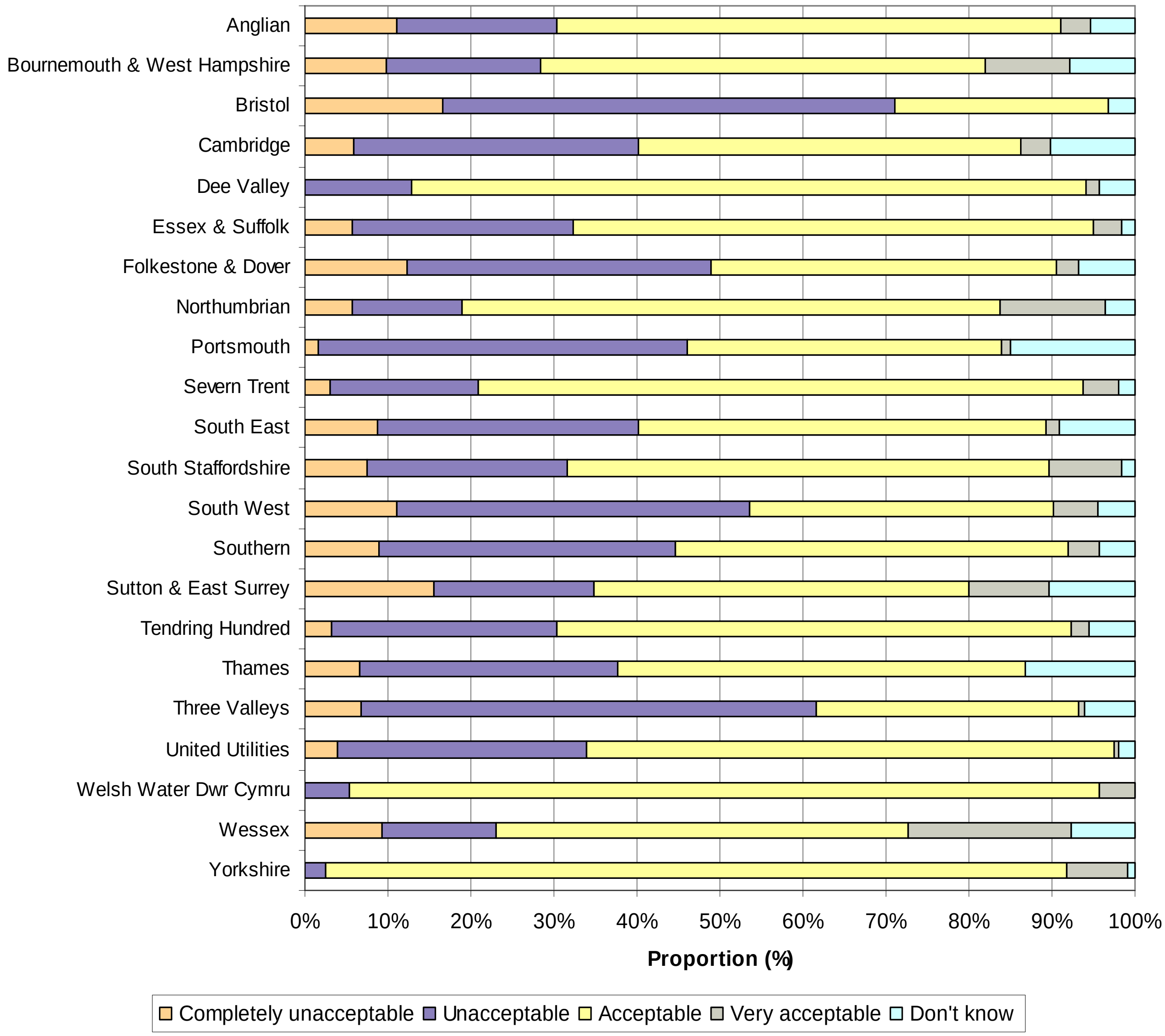
Table 6.1 Acceptability of water services aspects of the DBP

				Min. value across all companies	Max. value across all companies
Completely unacceptable	6%	6%	0%	0%	17%
Unacceptable	25%	26%	6%	3%	55%
Acceptable	61%	59%	89%	26%	90%
Very acceptable	4%	4%	4%	0%	20%
Don't know / can't say	5%	5%	1%	0%	15%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

6.3.2 Table 6.1 shows that, overall, 61% of customers thought that the DBP relating to water services was acceptable, and a further 4% found it "very" acceptable. One quarter (25%) of customers, thought that the DBP relating to water services was unacceptable, and 6% thought that it was "completely" unacceptable.

6.3.3 There was a considerable range in level of acceptance for the proposed water service levels between Wales customers (93% "acceptable" or "very acceptable") and England customers (63%); and even greater variation at company level (26% Bristol Water to 96% Yorkshire Water – see Figure 6.1). Note, the average water bill level change in Wales (-£0.50), was much lower than in England (+£23.05). In all but five companies, more than half the customers thought that the plan relating to water services was acceptable ("very"/"acceptable").

Figure 6.1 Acceptability of water services aspects of the DBP by company



6.3.4 Table 6.2 shows that customers whose proposed water bill impact / percentage water bill change was lowest were most accepting of the water services aspects of the DBP.

Table 6.2 Acceptability of water services aspects of the DBP – by Water bill Impact / % water bill change

	Water bill impact			Water bill % change		
	£10 or less	£11 - £24	£25+	5% or less	6 – 15%	16% +
Completely unacceptable	3%	8%	11%	3%	7%	10%
Unacceptable	16%	31%	35%	11%	31%	33%
Acceptable	72%	49%	45%	79%	50%	47%
Very acceptable	5%	6%	3%	4%	6%	4%
Don't know	4%	6%	6%	3%	7%	7%
Base	2,031	2,801	1,343	1,476	2,507	2,192

6.3.5 In contrast, when we looked at the relationship between acceptance level and scale of service improvements, we found no positive correlation. The two findings suggest that the size of bill impact influenced customers' acceptance levels but **not** the number of service improvements. It should be remembered, though, that the views reported here are those of consumers who foot the bill, and it may be that the influence of service improvements and bill impacts on acceptability of future plans may be different amongst all users of services compared with bill-payers only.

6.3.6 Table 6.3 shows that acceptability of the water services aspects of the DBP increased with household income, and socio-economic group.

Table 6.3 Acceptability of water services aspects of the DBP – by Household income / SEG

	Household Income					SEG		
	< 10k	10-20k	20k-30k	30k +	DK	D/E	C1/C2	A/B
Completely unacceptable	10%	8%	4%	4%	7%	8%	7%	7%
Unacceptable	28%	29%	27%	24%	26%	29%	27%	23%
Acceptable	52%	53%	57%	62%	56%	53%	56%	61%
Very acceptable	4%	6%	7%	6%	4%	5%	5%	6%
Don't know / can't say	6%	4%	4%	4%	7%	6%	6%	4%
Base	1,152	1,058	603	1,004	2,358	2,063	2,749	1,271

6.3.7 Table 6.4 highlights that a higher proportion of customers that had a better awareness/understanding of their company(ies) responsibilities thought that the DBP relating to water services was acceptable, compared to customers with less awareness/understanding.

Table 6.4 Acceptability of water services aspects of DBP – by awareness/understanding of their company(ies) responsibilities / confidence in bill estimate and whether or not the customer has had a negative experience

	Awareness/ understanding			Confidence in bill estimate					Complain / negative experience	
	Good	Fair	Poor	Not at all confident	Not very confident	Fairly confident	Very confident	Don't know	No	Yes
Completely unacceptable	7%	8%	7%	8%	8%	6%	13%	6%	7%	13%
Unacceptable	25%	27%	29%	53%	26%	26%	22%	24%	26%	36%
Acceptable	59%	55%	53%	32%	60%	61%	51%	56%	56%	44%
Very acceptable	5%	5%	5%	3%	3%	4%	10%	6%	5%	2%
Don't know	5%	6%	7%	4%	3%	3%	3%	9%	6%	5%
Base	2,090	2,461	1,624	208	662	1,955	454	90	5,969	206

6.3.8 Customers who had had a negative experience or reason to complain were less accepting of the DBP relating to water services. Customers who were more confident that they had estimated their water bill accurately were generally more accepting of the DBP relating to water services.

6.3.9 Customers who thought that the environment (64%), cost of living (63%) and water and sewerage services (62%) were "very important" were more accepting of the DBP relating to water services, compared to other customers (58% environment, 58% cost of living, 59% water and sewerage services).

6.3.10 Customers who thought that the DBP relating to water services was **unacceptable** were asked the main reason why. Table 6.5 shows that, overall, 61% of these customers thought that the service was too expensive already, 12% reported that they either cannot afford it, or do not think the improvements are worth the money.

6.3.11 The proportion of customers who felt that the proposed DBP relating to water services was unacceptable because the service was too expensive already ranged from 33% of Yorkshire Water customers, to 94% of Welsh Water Dŵr Cymru customers. However, as this question was only asked of a sub-sample of customers (e.g. those who felt that the proposed DBP relating to water services was unacceptable) small sample sizes apply.

Table 6.5 Reason the DBP relating to water services is unacceptable

				Min. value across all companies	Max. value across all companies
I don't value the improvements	4%	5%	0%	0%	11%
Improvements not worth the money	12%	12%	1%	0%	29%
Too expensive already	61%	60%	89%	33%	94%
Cannot afford it	12%	12%	3%	0%	22%
Oppose paying so much for a natural resource	2%	2%	1%	0%	22%
Oppose paying so much to companies who make large profits	6%	6%	1%	0%	16%
Oppose paying more to water companies when so much water is lost in leakage	1%	1%	1%	0%	4%
This should be done as a matter of course	*%	*%	0%	0%	1%
Other	*%	*%	5%	0%	6%
Don't know / can't say	1%	1%	0%	0%	11%
Total	100.0	100.0	100.0		
Base	2078	2028	50		

* non-zero but less than 0.5%

6.3.12 Customers who thought that the DBP relating to water services was **acceptable** were asked the main reason why. The main reasons were that the plan is affordable (54%), they value the improvements (24%) and the improvements are worth the money (19%).

6.3.13 The proportion of customers who felt that the proposed DBP relating to water services was acceptable because the plan is affordable ranged from 17% of Portsmouth Water customers, to 88% of Wessex Water customers. Again, the sub-sample sizes should be borne in mind when interpreting these results.

Table 6.6 Reason the DBP relating to water service is acceptable

				Min. value across all companies	Max. value across all companies
I value the improvements	24%	25%	16%	5%	52%
Improvements are worth the money	19%	20%	10%	3%	38%
Plan is affordable	54%	52%	74%	17%	88%
Everything/ Prices is/ are going up	*%	*%	0%	0%	1%
Have no choice but to pay	*%	*%	*%	0%	1%
Other	*%	*%	0%	0%	1%
Don't know / can't say	4%	4%	*%	0%	21%
Total	100.0	100.0	100.0		
Base	3753	3256	497		

* non-zero but less than 0.5%

6.3.14 Not only were customers in Wales more willing to accept their company's DBP (as reported in paragraph 6.2.3), a much higher proportion considered the DBP to be 'affordable'.

6.4 Acceptability of sewerage services aspects of DBP

6.4.1 Customers were asked how acceptable they consider their company's plan in relation to **sewerage** services. The views from WoC customers in this section relate to the services provided by the WaSC in each WoC area.

6.4.2 Table 6.7 highlights that overall 61% of customers thought that the DBP relating to sewerage services was acceptable, and a further 4% thought that it was "very" acceptable. Just less than one quarter (24%) of customers thought that their company's plan in relation to sewerage services was unacceptable, and 5% thought that it was "completely" unacceptable.

Table 6.7 Acceptability of sewerage services aspects of DBP

				Min. value across all companies	Max. value across all companies
Completely unacceptable	5%	6%	*%	0%	15%
Unacceptable	24%	25%	7%	2%	54%
Acceptable	61%	59%	89%	29%	90%
Very acceptable	4%	4%	4%	0%	18%
Don't know / can't say	6%	6%	1%	1%	16%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

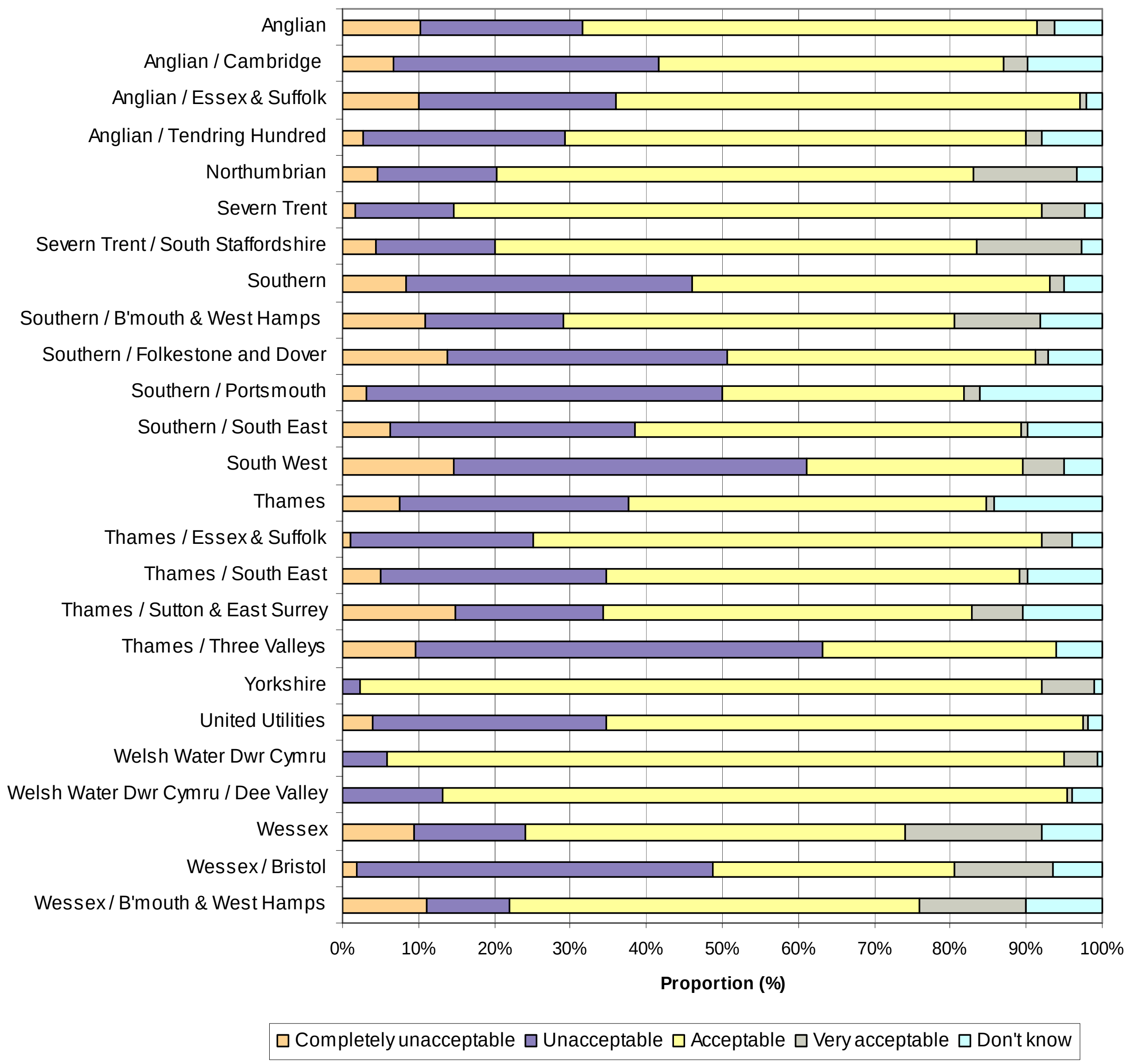
* non-zero but less than 0.5%

6.4.3 As with their view on water service proposals, there is a considerable difference in level of acceptance for sewerage service proposals amongst Wales customers (93% "acceptable" or "very acceptable") and England customers (63%). Note, the average sewerage bill level change in Wales (£5.00), was much lower than in England (+£20.85).

6.4.4 Figure 6.2 provides the level of acceptability of sewerage services by company. Note, for the 12 WoCs, this reflects the services provided by another company (i.e. one or more WaSCs). For example, for Wessex Water the views are presented separately for customers who receive their water services from Wessex Water, Bristol Water, and Bournemouth & West Hampshire Water.

6.4.5 There is considerable variation in acceptance at company level, ranging from 31% ("very"/"fairly" acceptable) Thames/Three Valleys Water to 97% Yorkshire Water. These results are discussed further in paragraphs 6.5.7 to 6.5.11.

Figure 6.2 Acceptability of sewerage services aspects of the DBP by company



6.4.6 Table 6.8 confirms that, as with the water services aspects of the DBP, there is a strong inverse relationship between acceptance levels and sewerage bill impacts – where the greater the bill impact the lower the level of acceptance.

Table 6.8 Acceptability of sewerage services aspects of the DBP – by Sewerage bill Impact / % sewerage bill change

	Sewerage bill impact			Sewerage bill % change		
	£10 or less	£11 - £24	£25+	5% or less	6 – 15%	16% +
Completely unacceptable	5%	9%	8%	5%	6%	9%
Unacceptable	19%	35%	39%	20%	27%	36%
Acceptable	64%	45%	42%	62%	60%	44%
Very acceptable	8%	3%	2%	8%	4%	2%
Don't know	5%	7%	9%	5%	3%	9%
Base	3,508	1,628	1,039	3,193	960	2,022

6.4.7 In this section we have shown that customers' customers' attitudes to the sewerage service aspects of the DBP mirror that of their attitudes to the water service aspects of the DBP, in terms of: level of acceptance and by bill impact (in absolute and percentage terms). This was also the case when we investigated customers' attitudes to the sewerage service aspects of the DBP by awareness/understanding of company(ies) responsibilities, income, SEG, confidence in the bill, importance of environment/cost of living/water and sewerage services etc., where the findings were all extremely similar to those presented in the above section (paras 6.3.4 – 6.3.9) but which we have not formally reported because of its repetitive nature.

6.4.8 However, the fact that customers' attitudes to water and, separately, sewerage, service aspects of the DBP were very similar is an important point to note, and one we return to later in this chapter.

6.5 Acceptability of DBP as a whole

6.5.1 Customers were asked how acceptable they consider their company(ies)' DBP as a whole, bearing in mind the other options available to their water company – such as simply maintaining services and complying with legal requirements or improving more services than in the current plan. 60% of customers, overall, thought that the DBP as a whole was acceptable, and 4% found it "very" acceptable. Just under one quarter of customers, overall, found the DBP as a whole unacceptable, and 7% found it "completely" unacceptable.

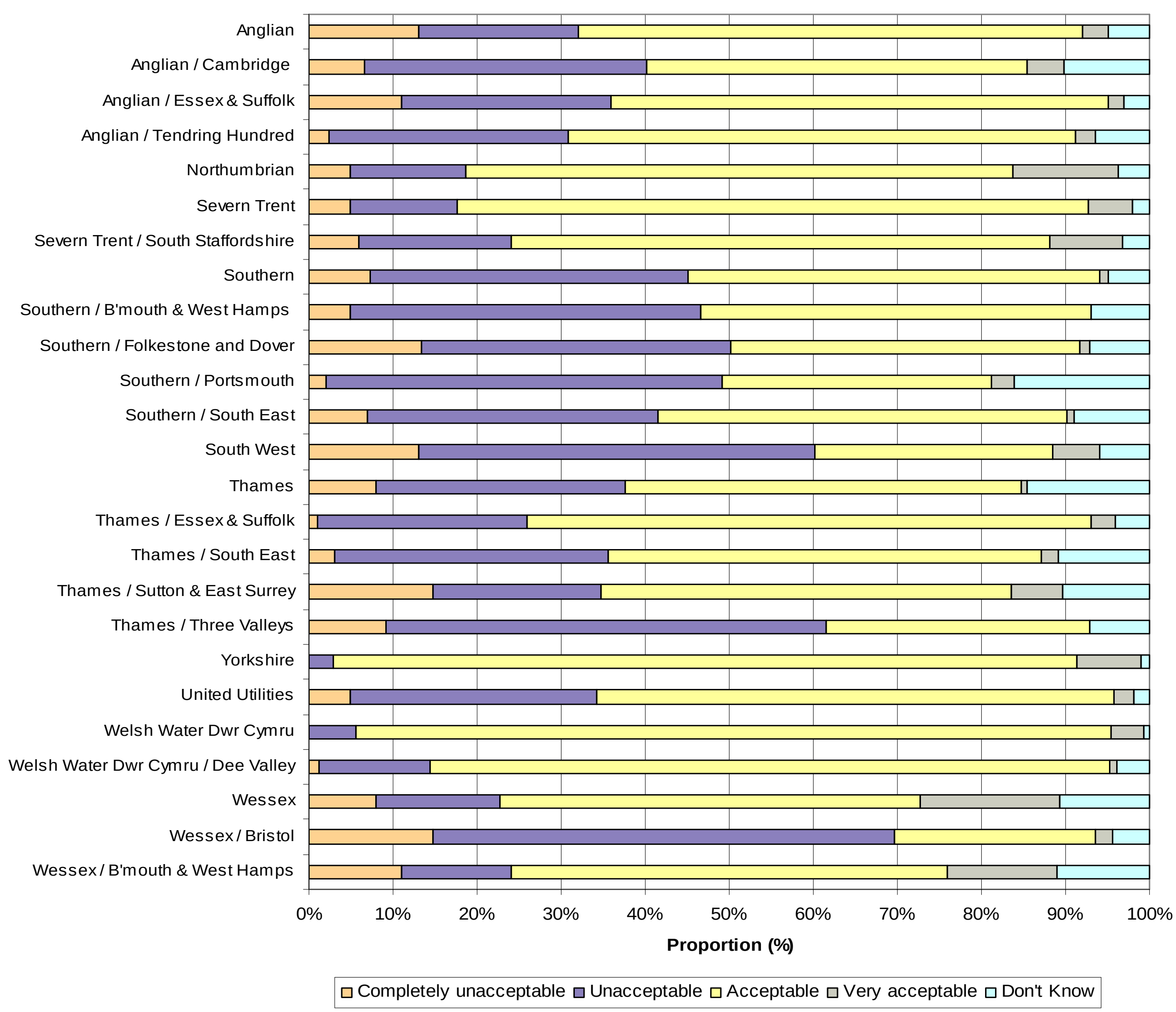
Table 6.9 Acceptability of DBP as a whole

				Min. value across all companies	Max. value across all companies
Completely unacceptable	7%	7%	*%	0%	15%
Unacceptable	24%	25%	6%	3%	55%
Acceptable	60%	58%	89%	24%	89%
Very acceptable	4%	4%	4%	0%	17%
Don't know / can't say	6%	6%	1%	1%	16%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

6.5.2 As with the water and sewerage service components separately, there is much greater support for the DBP amongst Wales customers (93% "acceptable" or "very acceptable") than amongst England customers (63%); and even greater variation at company level (26% customers of water and sewerage services in the Bristol region to 97% Yorkshire Water – see Figure 6.3).

Figure 6.3 Acceptability of DBP as a whole (water and sewerage)



6.5.3 At the uninformed level (Chapter 4), 62% of customers thought that the DBP as a whole was acceptable. However, when informed of detailed service levels and average bill impacts for customers in their area, a slightly higher proportion (64%) considered the proposed DBPs to be acceptable. Therefore at an informed level the proposed plans collectively, as they stand, would seem to be perceived a little more positively than services now.

6.5.4 At a company level, acceptability of the DBP (from the uninformed to informed view) increased slightly for customers of 13 companies, remained the same for five, and decreased slightly for four (Portsmouth/Southern 39% to 35%, Wessex Water 69% to 67%, Tendring Hundred/Anglian 65% to 62%, and Northumbrian Water 79% to 78%.

6.5.5 Table 6.10 shows that customers whose proposed overall bill impact/overall percentage bill change was lowest (£20 or less, or 5% and less) were more accepting of the overall DBP.

Table 6.10 Acceptability of DBP as a whole – by Overall bill Impact / % bill change

	Overall bill impact			Overall bill % change		
	£20 or less	£21 - £49	£50+	5% or less	6 – 15%	16% +
Completely unacceptable	5%	9%	8%	5%	9%	8%
Unacceptable	12%	38%	36%	12%	36%	35%
Acceptable	70%	45%	45%	72%	45%	45%
Very acceptable	8%	3%	2%	7%	4%	2%
Don't know	4%	7%	9%	4%	6%	10%
Base	2,546	2,239	1,390	2,330	2,152	1,693

6.5.6 Table 6.11 shows that acceptability of the DBP as a whole increased with household income.

Table 6.11 Acceptability of DBP as a whole – by Household income / SEG

	Household Income					SEG		
	< 10k	10-20k	20k-30k	30k +	DK	A/B	C1/C2	D/E
Completely unacceptable	10%	9%	4%	4%	7%	7%	7%	7%
Unacceptable	29%	28%	28%	24%	26%	23%	27%	29%
Acceptable	51%	53%	56%	62%	55%	60%	55%	53%
Very acceptable	4%	5%	7%	5%	4%	5%	5%	4%
Don't know / can't say	6%	5%	4%	5%	8%	5%	6%	7%
Base	1,152	1,058	603	1,004	2,358	1,271	2,749	2,063

6.5.7 In this section we have shown that customers' attitudes to the overall DBP mirror that of their attitudes to the water and sewerage service aspects of the DBP, in terms of: level of acceptance at an overall, national and company level; and by bill impact in absolute and percentage terms. This was also the case when we investigated customers' attitudes to the DBP by other customer segments where the findings were all extremely similar to those presented in the above section for water services but which we have not formally reported because of its repetitive nature.

6.5.8 Of crucial importance though, is the finding that customers' responses to the water and sewerage services aspects of the DBP were heavily influenced by their attitude towards the overall DBP package. This needs to be borne in mind when considering, and interpreting, customers' views to the WoC DBPs, especially those WoCs where their DBP (i.e. for the customers' water services) has a small bill impact and the corresponding WaSC's DBP (i.e. for the same customers' sewerage services) has a large bill impact. Similarly, the acceptability of a WaSC's proposed sewerage levels may have been influenced by the proposed water service and bill levels of a WoC when presented together as one overall package.

6.5.9 Such an example of the former is Portsmouth Water, where the bill impact for future water services is +£5 and the bill impact for future sewerage service is +£50. The level of acceptance amongst Portsmouth Water customers for the DBP overall, with a combined bill impact of +£55, is low at 35%[12]. This negative viewpoint of the overall plan seems to have manifest itself in the customers' response to the water service aspects of the DBP which, though presented as an additional cost of +£5, also has a low level of acceptance (39%). To confirm this interpretation, an investigation of the correlation between responses at an individual level showed that more than two in every three customers (68%) gave the same 'acceptance' response to the water aspects of the DBP as they did the sewerage aspects and overall DBP. These results suggest that, if Portsmouth's DBP is presented to customers alongside those relating to the sewerage aspects of Southern Water's DBP then accepting of the overall set of proposals will be low. **But** if presented in isolation[13], then customers' acceptance of the proposals is likely to be higher[14].

6.5.10 An example of the latter, is Wessex Water, where more than six in ten customers' rated the proposed sewerage service levels as acceptable when presented alongside Wessex Water's DBP for water services (68%), and Bournemouth and West Hampshire (63%), but only 45% of customers of Bristol Water found the (same) sewerage package acceptable when presented alongside Bristol Water's overall DBP package. These results suggest that, if Wessex Water's DBP is presented to customers alongside those relating to the water aspects of Bristol Water's DBP then acceptance levels will be lower than if presented in isolation.

6.5.11 Bristol Water customers were presented with bill impacts of +£40 for the water aspects of their DBP; and bill impacts of -£4 for the sewerage aspects of their DBP. Just over one in four customers (26%) considered the overall DBP to be acceptable; and a similar proportion considered the water aspects of the DBP to be acceptable. These results suggest that, for Bristol Water customers, it will not make much difference to customer acceptance whether Bristol Water's proposals are presented in isolation of Wessex Water's sewerage DBP.

---

[12] a further 16% stated 'don't know/can't say', compared with an average of 6% in England/Wales.

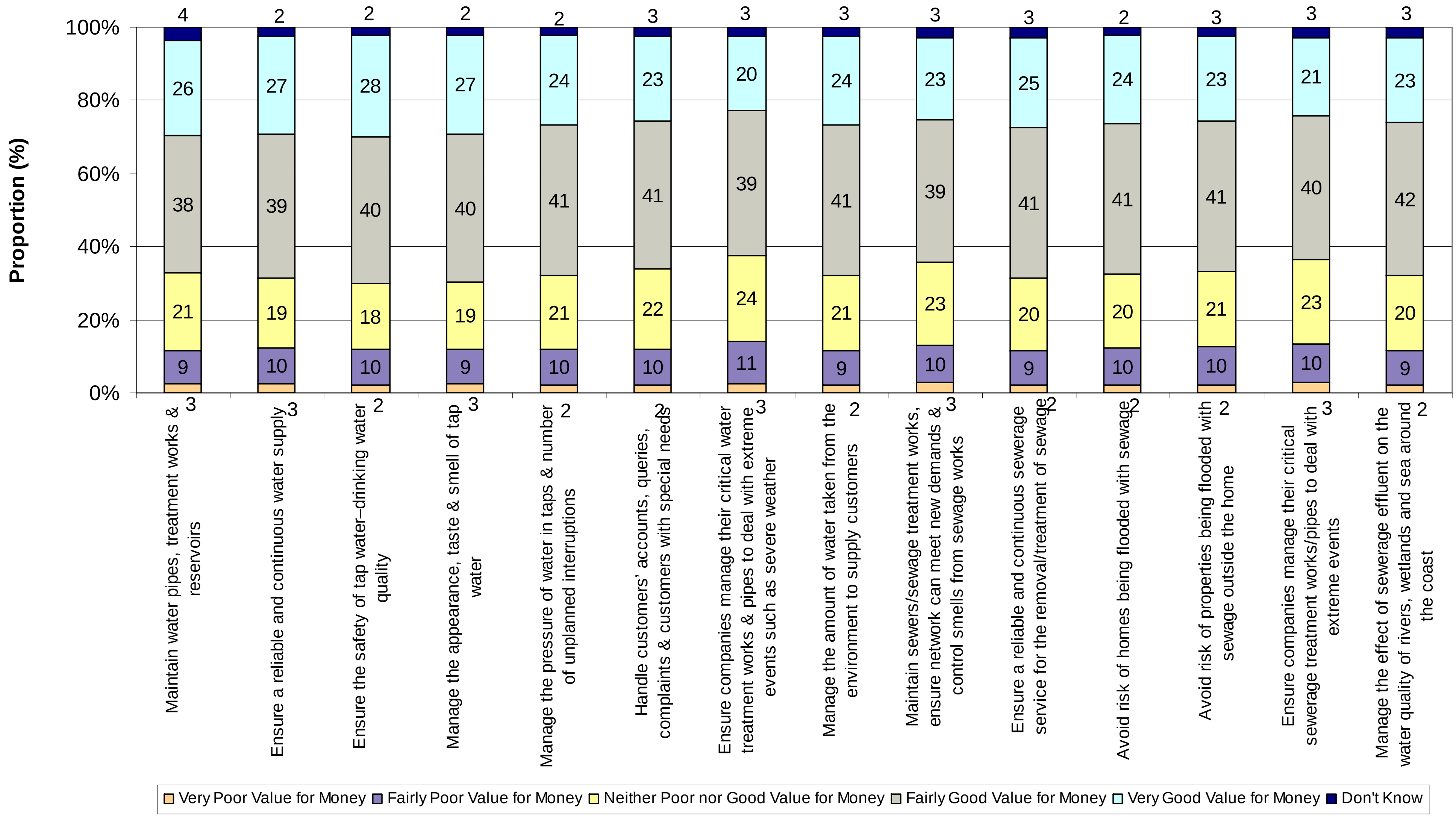
[13] such as was the case for Portsmouth Water's own customer research in 2007 and 2008.

[14] Based on the findings reported in Table 6.2 (for bill impacts <£10).

6.6 Value for money of proposed service levels

6.6.1 Customers were asked to look at each proposed service level, and state if they consider the proposed service level in the DBP to offer good, or poor, value for money. Figure 6.4 shows the overall results. Overall, most customers consider the proposed service level of each attribute to offer fairly good/good value for money (from 59% for managing "their critical water treatment works & pipes to deal with extreme events such as severe weather" to 68% for ensuring "the safety of tap water-drinking quality"). Approximately, 9-10% of customers consider the proposed future level of each attribute of service to offer fairly poor value for money; and a further 2-3% consider it to offer very poor value for money. It is clear that the individual service elements are generally seen as good value for money, but as a combined package the perception of value for money decreases (once the combined package and bill impact is considered).

Figure 6.4 Value for money of proposed service levels



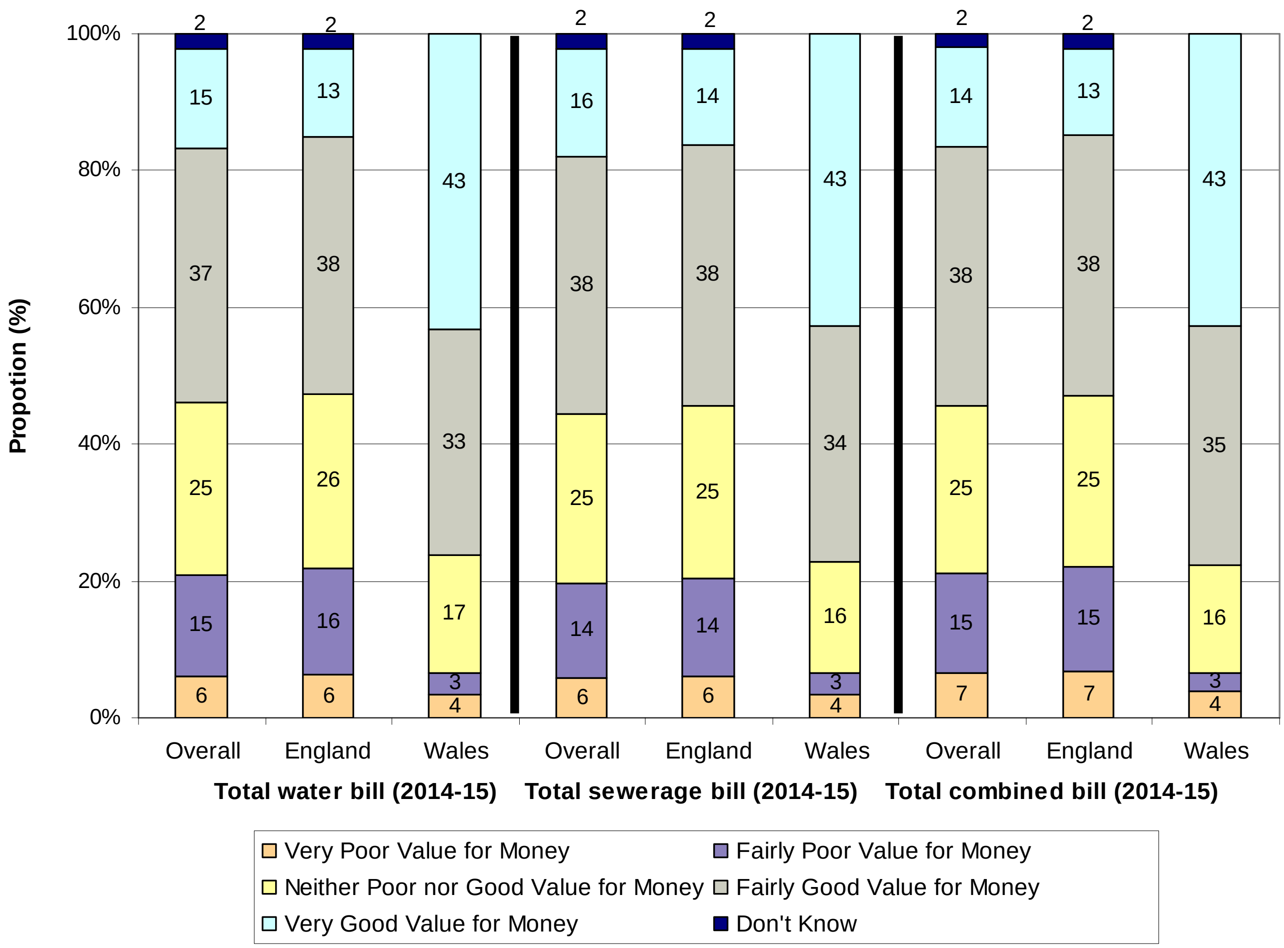
6.6.2 The service attributes that customers thought offered greatest value for money were ensuring the safety of tap water – drinking water quality (68%), managing the appearance, taste and smell of tap water (67%) and ensuring a reliable and continuous water supply (66%).

6.6.3 Variation in perceived value for money varied across the 22 companies. A full break down of results can be found in Appendix E.

6.7 Overall value for money of DBP

6.7.1 Customers were asked to consider the proposed service and bill levels for water, sewerage, and for the DBP overall, and asked to state whether they thought the proposals offered good, or poor, value for money. Figure 6.5 illustrates the results.

Figure 6.5 Overall value for money of DBP



6.7.2 Figure 6.5 shows that approximately half of customers overall, and in England, thought that the water aspects of the DBP (52% overall, 50% England), sewerage aspects (54% overall, 52% England), and DBP overall (52% overall, 51%, England) offered "fairly"/"very" good value for money, compared with more than three in every four customers in Wales (76%, 77%, 78%).

6.7.3 Approximately one-fifth of customers overall, and in England, thought that the DBP (and water and sewerage aspects, separately) offered "fairly"/"very" poor value for money, compared with around one in fourteen customers in Wales.

6.7.4 There has been an increase in the perceived value for money of the overall DBP's in comparison to the **PR04** study. In PR04, 45% of customers rated the company preferred DBP as good value for money, compared to 52% in PR09. In addition, the number of customers who thought that the DBP was poor value for money has decreased (from 30% in PR04 to 22% in PR09). It is important to note however that the bill changes/service levels proposed are different to those in PR04.

6.7.5 Variation in perceived value for money by water company is reported in Table 6.12. For ease of comparison, and to retain the larger sample size (approx 250) views of customers in WoCs with one or more sewerage providers have been aggregated to each of the water companies (Bournemouth & West Hampshire, Essex & Suffolk and South East).

6.7.6 A high proportion of Yorkshire Water (90%) and Welsh Water Dŵr Cymru (77%) customers thought that the **water** aspects of the DBP offered "fairly"/"very" good value for money, compared with 26% of Bristol Water and Portsmouth Water customers.

6.7.7 A high proportion of Yorkshire Water (88%) and Welsh Water Dŵr Cymru (78%) customers thought that the **sewerage** aspects of the DBP offered "fairly"/"very" good value for money, compared with 28% of customers from Southern/Folkestone & Dover Water, Southern Water and Thames/Three Valleys Water.

6.7.8 In line with customer attitudes to the water aspects of the DBP, the proportion of customers who perceived the DBP **overall** as "fairly"/"very" good value for money ranged from around one quarter of customers of water and sewerage services in the Bristol region (23%) and Portsmouth Water/Southern (24%) customers, to the majority of customers of Welsh Water Dŵr Cymru (79%) and Yorkshire Water (88%) customers.

Table 6.12 Overall value for money of DBP

		ANH	BWH	BRL	CAM	DVW	ESK	FLK	NNE	PRT	SVT	SEW	SST	SWT	SRN	SES	THD	TMS	TVW	NWT	WSH	WSX	YKS
Total water bill	Poor VfM	21%	19%	51%	26%	12%	27%	50%	11%	8%	16%	26%	22%	27%	38%	27%	22%	28%	26%	26%	6%	17%	1%
	Neither poor nor good VfM	35%	16%	22%	34%	27%	17%	23%	34%	60%	19%	38%	26%	29%	31%	10%	36%	34%	40%	17%	16%	11%	8%
	Good VfM	44%	60%	26%	38%	60%	56%	27%	55%	26%	63%	37%	51%	44%	30%	52%	42%	31%	32%	56%	77%	67%	90%
	Don't know	1%	5%	1%	2%	1%	0%	0%	0%	6%	2%	0%	1%	0%	1%	12%	0%	7%	3%	1%	0%	5%	1%
Total sewerage bill	Poor VfM	21%	20%	34%	26%	13%	27%	49%	11%	14%	8%	26%	11%	41%	40%	27%	22%	28%	26%	24%	6%	18%	1%
	Neither poor nor good VfM	38%	18%	29%	39%	28%	20%	22%	29%	52%	13%	33%	27%	26%	31%	10%	34%	35%	43%	18%	15%	12%	10%
	Good VfM	40%	57%	36%	33%	59%	53%	28%	60%	30%	77%	41%	60%	33%	28%	51%	44%	31%	28%	57%	78%	66%	88%
	Don't know	1%	5%	1%	2%	0%	0%	0%	0%	5%	2%	0%	2%	0%	0%	11%	0%	7%	3%	1%	0%	5%	0%
Total combined bill	Poor VfM	20%	22%	57%	26%	13%	27%	48%	12%	10%	15%	25%	17%	40%	37%	29%	22%	28%	25%	25%	6%	17%	1%
	Neither poor nor good VfM	33%	18%	19%	38%	27%	20%	23%	29%	64%	16%	34%	30%	24%	34%	9%	32%	33%	43%	17%	15%	17%	11%
	Good VfM	46%	55%	23%	35%	59%	53%	29%	59%	24%	68%	41%	52%	35%	28%	52%	47%	32%	28%	57%	79%	61%	88%
	Don't know	1%	5%	1%	2%	0%	0%	0%	1%	2%	2%	0%	1%	0%	0%	11%	0%	7%	4%	1%	0%	5%	0%
	Total:	300	293	277	254	257	260	253	301	254	302	254	253	336	302	250	250	303	250	309	302	300	315

*WoCs with two sewerage providers - Bournemouth & West Hampshire (Wessex/Southern), Essex & Suffolk (Anglian/Thames), South East (Thames/Southern).

6.7.9 Table 6.13 highlights that a higher proportion of customers that had a better awareness/understanding of their company(ies) responsibilities rated the value for money of the DBP as good value for money ("very"/"fairly"), compared to customers with less awareness/understanding. Customers who had had a negative experience or reason to complain to their water company(ies) generally rated the value for money of the DBP poorer than those customers who had not complained. A higher proportion of customers who were more confident that they had estimated their water/sewerage bill accurately generally rated the value for money of the DBP as good value for money than those who were less confident. Similar findings were evident amongst these customer segments for the separate value for money ratings of both the separate water and sewerage aspects of the DBP.

Table 6.13 Overall value for money of DBP (combined bill) - by awareness/understanding of their company(ies) responsibilities / confidence in bill estimate and whether or not the customer has had a negative experience

	Awareness/ understanding			Confidence in bill estimate					Complain / negative experience	
	Good	Fair	Poor	Not at all confident	Not very confident	Fairly confident	Very confident	Don't know	No	Yes
Very poor vfm	8%	8%	7%	8%	9%	7%	12%	10%	7%	17%
Fairly poor vfm	16%	15%	17%	39%	19%	16%	16%	12%	16%	25%
Neither poor / good vfm	21%	31%	26%	19%	26%	25%	19%	22%	26%	26%
Fairly good vfm	35%	33%	36%	22%	35%	38%	37%	36%	34%	24%
Very good vfm	19%	12%	12%	11%	10%	13%	15%	17%	14%	8%
Don't know	1%	2%	3%	1%	1%	1%	1%	3%	2%	0%
Base	2,090	2,461	1,624	208	662	1,955	454	90	5,969	206

6.7.10 Table 6.14 highlights that the proportion of customers who rated the value for money of the DBP (water and sewerage services combined) as good value for money ("very"/"fairly") increased with household income.

Table 6.14 Overall value for money of DBP (combined bill) – by Household income

	Household Income				
	< 10k	10-20k	20k-30k	30k +	DK
Very poor value for money	10%	6%	5%	5%	9%
Fairly poor value for money	19%	18%	17%	14%	15%
Neither poor / good value for money	24%	27%	25%	26%	27%
Fairly good value for money	30%	33%	37%	38%	34%
Very good value for money	15%	14%	15%	16%	13%
Don't know	2%	1%	1%	1%	2%
Base	1,152	1,058	603	1,004	2,358

6.7.11 A higher proportion of customers who thought that the environment (49%), cost of living (50%) and water and sewerage services (49%) were "very important" rated the value for money of the DBP (water and sewerage services combined) as good value for money ("very"/"fairly"), compared to other customers (47% environment, 46% cost of living, 46% water and sewerage services.

6.7.12 As expected, there was a strong inverse correlation between value for money perceived by customers and the size of the bill impact (in absolute or percentage terms). That is, where the proposed bill impact was relatively low, the proportion of customers perceiving that the DBP (or the water, or sewerage, aspects) offered ("very"/"fairly") good value for money was relatively high (compared to those with a higher proposed bill increases - see Tables 6.15-6.17).

Table 6.15 Overall value for money of water aspects of the DBP – by water bill impact / % water bill change

	Water aspects (£s)			Water aspects (%)		
	£10 or less	£11 - £24	£25+	5% or less	6 – 15%	16% +
Very poor vfm	4%	6%	12%	4%	5%	10%
Fairly poor vfm	7%	19%	24%	7%	16%	22%
Neither poor / good vfm	28%	27%	22%	21%	31%	24%
Fairly good vfm	39%	33%	29%	42%	33%	30%
Very good vfm	21%	13%	10%	25%	13%	11%
Don't know	1%	2%	3%	1%	3%	3%
Base	2,031	2,801	1,343	1,476	2,507	2,192

Table 6.16 Overall value for money of sewerage aspects of the DBP – by sewerage bill impact / % sewerage bill change

	Sewerage aspects (£s)			Sewerage aspects (%)		
	£10 or less	£11 - £24	£25+	5% or less	6 – 15%	16% +
Very poor vfm	4%	10%	12%	4%	10%	10%
Fairly poor vfm	12%	19%	22%	13%	13%	20%
Neither poor / good vfm	23%	27%	34%	25%	18%	32%
Fairly good vfm	39%	29%	25%	37%	42%	26%
Very good vfm	20%	11%	6%	19%	17%	9%
Don't know	1%	4%	2%	2%	0%	4%
Base	3,508	1,628	1,039	3,193	960	2,022

Table 6.17 Overall value for money of the DBP – by Overall bill Impact / % overall bill change

	Overall DBP (£s)			Overall DBP (%)		
	£20 or less	£21 - £49	£50+	5% or less	6 – 15%	16% +
Very poor vfm	5%	8%	12%	5%	8%	10%
Fairly poor vfm	8%	24%	18%	8%	23%	19%
Neither poor / good vfm	21%	28%	33%	22%	26%	33%
Fairly good vfm	41%	31%	26%	42%	32%	26%
Very good vfm	23%	7%	9%	23%	10%	8%
Don't know	2%	2%	2%	1%	1%	3%
Base	2,546	2,239	1,390	2,330	2,152	1,693

6.8 Further changes to the DBP

6.8.1 Customers were asked if there were any other changes to the company plan that they would like to see made that have not been covered.

Table 6.18 Further changes to the company plan

				Min. value	Max. value
Reduce prices/charges	3%	3%	1%	0%	18%
Improve water appearance/colour/quality/taste	1%	1%	1%	0%	3%
Quicker response times	*%	*%	*%	0%	1%
Reduce number of leakages/increase pipe repairs	1%	1%	*%	0%	2%
Improve the sewage system	*%	*%	1%	0%	4%
Generally take more responsibility	*%	*%	0%	0%	1%
Install water meters nationally	*%	*%	0%	0%	2%
Consumers shouldn’t have to pay for beach/coastline cleaning	*%	*%	0%	0%	1%
Improve the water pressure	*%	*%	0%	0%	1%
Deal with the drainage problems/flooding problems	1%	*%	1%	0%	1%
Give the option to install a water meter	*%	*%	*%	0%	1%
Be responsible for repairs to all pipes	*%	*%	0%	0%	1%
Have a fairer pricing / water charging scheme	*%	*%	1%	0%	1%
Increase in charges should be linked to improvements	*%	*%	0%	0%	2%
Service should be nationalized	*%	*%	0%	0%	*%
Improve water saving methods	*%	*%	0%	0%	1%
Water is too chalky/hard water/lime scale problems	*%	*%	*%	0%	2%
Improve level of service/customer service/information	1%	1%	*%	0%	4%
Protect nature / wildlife / environment	*%	*%	*%	0%	2%
Reduce money wastage (unspecified source)	*%	*%	0%	0%	1%
More frequent meter readings	*%	*%	*%	0%	1%
Plan should already be in action	*%	*%	0%	0%	2%
Other	4%	4%	2%	0%	70%
None	87%	87%	94%	20%	99%
Don’t know	1%	2%	*%	0%	*%
Refused	*%	*%	0%	0%	2%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

6.8.2 Table 6.18 shows that, overall, 87% of customers stated that there were no other changes to the company plan that they would like to see made. However, 3% would like to see a reduction in prices/charges. (It should be noted, though, that this question was asked at the end of the questionnaire, and was designed to capture any pent-up issues that the respondent may have with their water company, or its impacts on the local environment.

6.9 Delay in service changes

6.9.1 Customers were asked to consider how concerned they would be if the changes proposed by their companies in the DBP were delayed. They were asked to highlight which services (selecting up to three) would cause them most concern if they were delayed. Table 6.19 shows how customers responded to this question, and indicates customers' views at the overall level (and separately for England/Wales), and the range of findings at company level.

6.9.2 Table 6.19 shows that customers would be most concerned if there was a delay to the attributes ensuring the safety of tap water – drinking water quality (67%) and ensuring a reliable and continuous water supply (63%).

6.9.3 In **PR04**, the service attributes that would cause them most concern if they were delayed were ensuring the safety of tap water and maintaining sewerage pipes and treatment works, meeting new demands and control smells from sewage works.

Table 6.19 Concern over delay in delivery

				Min. value across all companies	Max. value across all companies
Maintain water pipes, treatment works and reservoirs	23%	23%	31%	5%	38%
Ensure a reliable and continuous water supply	63%	62%	84%	32%	88%
Ensure the safety of tap water – drinking water quality	67%	67%	75%	40%	85%
Manage the appearance, taste and smell of tap water	33%	34%	19%	14%	58%
Manage the pressure of water in your taps and the number of unplanned interruptions	8%	9%	8%	2%	34%
Handle customers' accounts, queries, complaints and customers with special needs	11%	11%	19%	1%	43%
Ensure companies manage their critical water treatment works and pipes to deal with extreme events such as severe weather	5%	5%	5%	1%	16%
Manage the amount of water taken from the environment to supply customers	3%	3%	3%	0%	11%
Maintain sewers and sewage treatment works, ensure network can meet new demands and control smells from sewage works	3%	4%	1%	1%	7%
Ensure a reliable and continuous sewerage service for the removal and treatment of sewage	16%	15%	32%	2%	28%
Avoid risk of homes being flooded with sewage	7%	7%	4%	2%	13%
Avoid risk of properties being flooded with sewage outside the home	2%	2%	1%	0%	7%
Ensure companies manage their critical sewerage treatment works and pipes to deal with extreme events e.g. severe weather	1%	1%	*%	0%	4%
Manage the effect of sewerage effluent on the water quality of rivers, wetlands and sea around the coast	1%	1%	0%	0%	3%
Don't know / can't say	4%	5%	*%	0%	19%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

7 Bill Profile and Further Questions

7.1 Question context

7.1.1 Customers were told that bills would be likely to change during the period 2010-2015 and, whilst the overall bill would remain the same, there could be several ways in which this cost could be incurred by customers. They were shown a number of bill profiles and asked which one they would prefer.

7.2 Bill profile

7.2.1 Customers' views are summarised in Table 7.1. Over eight in ten (81%) customers, overall, stated that they would prefer to see "bills change steadily every year throughout the period, so that customers do not see big changes from year to year". This was a slight increase from the **PR04** figure (78%).

Table 7.1 Customers' preferred bill profile

				Min. value across all companies	Max. value across all companies
Bills change every year (could be up one year and down the next) [1]	7%	8%	4%	0%	30%
Bills show one big step change in the first year, then stay the same [2]	12%	10%	36%	2%	39%
Bills change steadily every year, so no big changes from year to year[3]	81%	82%	60%	51%	98%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

[1] Full description to respondent was: "Bills change every year according to how much work water companies have to do. This could mean changes in bills for customers up one year and down the next"

[2] Full description: "Bills show one big step change in the first year, then stay the same for the following four years"

[3] Full description: "Bills change steadily every year throughout the period, so that customers do not see big changes from year to year."

7.2.2 This was the preference of the majority of customers in every company. At least half of the customers in all company areas expressed a preference for bills to change steadily every year throughout the period. In most company areas the proportion was much higher. It ranged from 51% (Wessex Water) or 57% (Anglian Water, Cambridge Water, Welsh Water Dŵr Cymru) to 95% (Dee Valley Water) and 98% (Tendring Hundred Water).

7.3 Further question

7.3.1 Finally, customers were asked if, on reflection, there were any current issues not already discussed relating to water or sewerage services, or paying their bill, that they had in mind when answering the questions. The majority of customers stated that they did not have any other current issues relating to water or sewerage services in mind (84%).

Table 7.2 Current issues considered

				Min. value	Max. value
High cost of water charges/expensive service	1%	1%	*%	0%	3%
Don't increase/should reduce charges	2%	3%	1%	0%	15%
Receive good level of service/happy with service	2%	2%	1%	0%	9%
Service is reliable	*%	*%	0%	0%	1%
Want a water meter installed	*%	*%	*%	0%	1%
Improve the water appearance/colour/quality/taste	1%	1%	0%	0%	1%
Difficulty paying bill with limited income/pension	*%	*%	0%	0%	1%
Breakdown of billing/justifying high cost of water	*%	*%	*%	0%	1%
Solve the water pressure problem	1%	1%	*%	0%	2%
Consumers shouldn't have to pay for beach/coastline cleaning	*%	*%	0%	0%	1%
Water meters should be installed nationally	*%	*%	0%	0%	1%
Solve the problems that cause flooding	*%	*%	*%	0%	2%
Improve drainage system/problems with blockages	*%	*%	*%	0%	2%
Deal with hard water/lime scale problem	*%	*%	0%	0%	3%
Reduce bad smells	*%	*%	*%	0%	2%
Have special rates for certain customer groups (pensioners, families with small children)	*%	*%	0%	0%	3%
Increase in charges should be linked to improvements	*%	*%	0%	0%	2%
Protect nature/wildlife/environment	*%	*%	0%	0%	1%
Plan should already be in action	*%	*%	0%	0%	1%
Water company should be responsible for all areas of pipe network	*%	*%	0%	0%	*%
More frequent meter reading	*%	*%	0%	0%	*%
Improve level of service/customer information	*%	*%	0%	0%	4%
Reduce the number/there are too many chemicals added to water	*%	*%	0%	0%	*%
Reduce number of leakages/increase pipe repairs	*%	*%	*%	0%	1%
Other	4%	4%	*%	0%	70%
None	84%	84%	96%	25%	100%
Don't know	4%	4%	*%	0%	33%
Refused	*%	*%	0%	0%	2%
Total	100.0	100.0	100.0		
Base	6175	5616	559		

* non-zero but less than 0.5%

8 Conclusions

8.1 Overview

8.1.1 The results reported in the previous five chapters, and the conclusions given in this section, provide a high-level overview of customer attitudes across England and Wales. It must be remembered that customers' reported views relate to different service levels currently, and to very different sets of proposals for future water and sewerage service levels across the 22 water companies.

8.1.2 Without any prior information about current services and bill levels, the majority of customers regard the existing service (water and sewerage combined) as good **value for money** (64% consider it "very"/"fairly" good value for money). When informed of detailed service levels and average bill impacts for customers in their area, a lower proportion of customers regard the existing overall (water and sewerage combined) service as good value for money (59% consider it "very"/"fairly" good value for money). Just over half (52%) of informed customers considered the proposed DBPs to be "very"/"fairly" good value for money.

8.1.3 At the uninformed level, 62% considered the proposed DBPs to be **acceptable**. When informed of current and proposed detailed service levels and average bill impacts for customers in their area a slightly higher proportion (64%) considered the proposed DBPs to be acceptable. At a company level, acceptability of the DBP (from the uninformed to informed view) increased slightly for customers of 13 companies, remained the same for five, and decreased for four

8.1.4 Customer acceptance of their companies' overall future plans for service and bill levels varied considerably, from 26% to 96%. However, the difference in bill levels in the plans vary significantly and so it is perhaps not surprising to find such a different level of acceptance of the overall plans amongst different water company customers. Customers whose proposed water/sewerage bill impact and percentage water/sewerage bill change was lowest were most accepting of the water and sewerage services aspects of the DBP.

8.1.5 In all but five of the companies, there was a high level of acceptance for the overall DBPs (with a greater proportion stating that the DBP was acceptable than unacceptable). It was found that customers' responses to the water and sewerage services aspects (separately) of the DBPs were heavily influenced by their attitude towards the water and sewerage (combined) package. This needs to be borne in mind when considering, and interpreting, customers' views of a WoC's DBP that has a small bill impact alongside a WaSC's sewerage service plan that has a large bill impact; or customers' views of a WaSC's DBP that has a small bill impact alongside a WoC's water service plan that has a large bill impact.

8.1.6 The acceptability of DBPs at both informed and uniformed levels, and rating of current services and proposed service levels (informed) for water, sewerage and combined service, as good value for money was highest amongst customers that:

- had not complained or had a negative experience;
- had a good understanding/awareness of their water/sewerage company(ies)' responsibilities;

- were generally more confident in the estimation of the current level of their water/sewerage bill;
- rated the environment as 'very important';
- rated cost of living as 'very important';
- rated water and sewerage services as 'very important';
- did not find it difficult to pay their bills on time;
- were satisfied with the current service;
- felt the current service offered good value for money;
- were of a higher (e.g. A/B) social class; and
- had a higher household income.

8.1.7 In addition, the proportion of customers who rated the proposed DBP (water, sewerage, combined) as acceptable and good value for money, was highest amongst customers who had:

- proposed water and sewerage bill impacts each less than £10;
- a combined bill impact of £20 or less; and
- a proposed water, sewerage and combined percentage bill impact of 5% or less.

8.1.8 Although the results were statistically significant, there was no correlation/trend between acceptance level or value for money and scale/number of service improvements and household size.

Affordability (including value for money)

8.1.9 The main reason that some respondents rated the current water and sewerage service as good value for money was that the bill was affordable. Of the customers who rated the current water and sewerage service as poor value for money, the main reason was that it was too expensive already. This suggests that the key driver for perceptions of good value for money is concern about bills.

8.1.10 The proportion of customers that rated the value for money of the current water, sewerage, and overall service they received as "fairly" or "very" good increased with household income. In addition, a higher proportion of customers in socio-economic group A/B, and those on higher incomes stated that they don't find it difficult to pay their bill on time.

8.1.11 With relatively limited information available the level of DBP acceptance was highest amongst customers in socio-economic group A/B (62%), followed by those in group C1/C2 (59%), and those in group D/E (54%). Acceptance of the DBP also increased with household income.

8.1.12 When informed of detailed service levels and average bill impacts for customers in their area, again, acceptability of the water, sewerage and overall services aspects of the DBP increased with household income, and socio-economic group. Similarly, the proportion of customers who rated the value for money of the DBP (water and sewerage services combined) as good value for money ("very"/"fairly") increased with household income.

8.1.13 At the beginning of the report there is a statement that this research will help stakeholders to understand customers' views on affordability – but as there is no direct affordability question in this survey we can only draw limited conclusions on affordability to show general trends.

8.1.14 The questions that related to affordability asked people (unprompted) to say why plans were poor value for money and one of several options they could respond with was 'can't afford it'. Whilst people were far more likely to say 'it's too expensive already' than say it would be unaffordable, conversely, those who found the plans were good value for money were most likely to say this was because 'it's affordable'. The same pattern comes out when asked why plans are considered acceptable/unacceptable. There are clear trends that as prices go up, and at lower incomes, acceptability levels go down, and perceptions of value for money shift towards the poorer end of the spectrum. Beyond this, it is not possible to draw more detailed conclusions on affordability.

8.2 Customers' Views on Water and Sewerage issues in the Wider Social Context

8.2.1 More than nine in ten customers considered water and sewerage services to be important. Customers generally considered water and sewerage services to be as important as some wider social issues, such as: health services, cost of living, crime prevention, utility services and the environment; and a (slightly) more important issue than transport or immigration.

8.2.2 Environmental issues that were most important to customers are reducing climate change, reducing litter and household waste, improving air quality and protecting the water environment (streams, canals, rivers, lakes, wetlands and sea around the coast).

8.3 Customers' Appreciation of the Water Industry's Responsibilities

8.3.1 The majority of respondents were correctly aware that their water and sewerage company(ies) were responsible for:

- providing safe, reliable, clean drinking water;
- removal and treatment of waste water; and
- maintaining pipes, treatment works, and other infrastructure.

8.3.2 Customers also considered these individual service aspects to be the most important, ones provided by water and sewerage company(ies). Services that customers considered less important were:

- helping to reduce greenhouse gas emissions and tackle climate change; and
- drainage of roads.

8.3.3 However, around one in four customers incorrectly thought that their water and sewerage company(ies) were responsible for:

- reducing litter in waterways;
- preventing flooding from rivers;

- managing water pollution from agriculture and manufacturing; and
- managing canal systems.

8.4 Customers' Priorities for Maintaining and Improving Services, their Acceptance for Bill Level Increases to Achieve this, and views on their Company's DBP

8.4.1 Each company's DBP comprised a combination of maintaining and improving existing services. The scale/number of proposed service level **improvements** ranged from five (Dee Valley, Folkestone & Dover, South East, Bournemouth & West Hampshire, Northumbrian) to ten (Thames). Approximately two-thirds of customers considered that their water company's DBP (averaging, overall, eight improvements) and the impacts on their bill was **acceptable**. The main reasons being that the plan is affordable (as indicated above, customers generally considered the DBP to be acceptable **if** the overall bill impact was below £10), they valued the improvements, and the improvements are worth the money.

8.4.2 Amongst eight of the 10 WaSCs, the majority of customers 'accepted' the DBP overall (including 97% of Yorkshire Water customers, 93% of Welsh Water customers, 80% of Severn Trent Water customers, and 78% of Northumbrian Water customers). For Thames Water, a minority (just) accepted the plan overall (48%) but still more than the proportion who considered it unacceptable (38%). Only customers at one WaSC, South West Water, is there significant lack of support for their company's DBP with only one-third (34%) accepting the plan.

8.4.3 However, approximately three in ten customers felt that their water company's DBP and the impacts on their bill for water services, sewerage services and the overall bill were **unacceptable**. The main reasons were that it was too expensive already, the customers cannot afford it and that the improvements are not worth the money.

8.4.4 Amongst eight of the 12 WoCs, the majority of customers 'accepted' the DBP overall (including 82% of Dee Valley Water customers, 74% of South Staffordshire Water customers, 63% of Essex & Suffolk Water customers, 62% Tendring Hundred customers, and 61% of Bournemouth & West Hampshire Water customers). For three WoCs, there is minority support for their company's DBP (26% - Bristol Water, 31% - Three Valleys Water, and 35%[15] - Portsmouth Water). In our view, we think it likely that the low level of support amongst Three Valleys Water customers is due to the perception that the service offering is not perceived to be good value for money (+£19 simply to maintain the current level of repair of pipes and leakage levels). Similarly, for Bristol Water where the bill impacts for water aspects is +£44. However, the level of support for Portsmouth Water's DBP seems to have been affected by the relatively high increase in bill impacts for sewerage aspects; and, perhaps, gives an unfair reflection on Portsmouth Water's customers' view of its own DBP, if presented in isolation.

8.4.5 There was a strong inverse correlation between value for money perceived by customers and the size of the bill impact (in absolute or percentage terms). That is, where the proposed bill impact was relatively low, the proportion of customers perceiving that the DBP (or the water, or sewerage, aspects) offered ("very"/"fairly") good value for money was relatively high (compared to those with a higher proposed bill increases).

[15] a further 16% stated 'don't know/can't say', compared with an average of 6% in England/Wales.

8.4.6 Customers consider that ensuring the safety of tap water – drinking water quality, and ensuring a reliable and continuous water supply, to be aspects of service that should be implemented without delay.

8.5 The Importance of the Phasing-in of Bill Increases

8.5.1 The majority of customers (over eight in every ten), stated that they would prefer to see *"bills change steadily every year throughout the period, so that customers do not see big changes from year to year"* rather than bills that fluctuate every year, or has one big step-up and then stays at that level. This is in line with the views of customers during the previous periodic review.

8.6 To explore how customer attitudes have changed since the last price review (PR04).

Customers are happier now with their current water and sewerage services than in PR04, with an increase in the proportion stating that they are satisfied. In addition, the DBPs are better received in PR09, as 52% of customers rated the DBP as good value for money. This is a more positive view than PR04, when 45% of customers rated the company preferred DBP as good value for money. In addition, the number of customers who thought that the DBP is poor value for money has decreased (from 30% in PR04 to 22% in PR09). It is important to note however that the bill changes/service levels proposed are different to those in PR04.

MVA Consultancy provides advice on transport and other policy areas, to central, regional and local government, agencies, developers, operators and financiers.

A diverse group of results-oriented people, we are part of a 350-strong team worldwide. Through client business planning, customer research and strategy development we create solutions that work for real people in the real world.

For more information visit www.mvaconsultancy.com

Birmingham
Second Floor, 37a Waterloo Street
Birmingham B2 5TJ United Kingdom
T: +44 (0)121 233 7680 F: +44 (0)121 233 7681

Dubai
Office 402, Building 49, Dubai Healthcare City
PO Box 123166, Dubai, UAE
T: +971 (0)4 433 0530 F: +971 (0)4 423 3613

Dublin
First Floor, 12/13 Exchange Place
Custom House Docks, IFSC, Dublin 1, Ireland
T: +353 (0)1 542 6000 F: +353 (0)1 542 6001

Edinburgh
Stewart House, Thistle Street, North West Lane
Edinburgh EH2 1BY United Kingdom
T: +44 (0)131 220 6966 F: +44 (0)131 220 6087

Glasgow
Seventh Floor, 78 St Vincent Street
Glasgow G2 5UB United Kingdom
T: +44 (0)141 225 4400 F: +44 (0)141 225 4401

London
Second Floor, 17 Hanover Square
London W1S 1HU United Kingdom
T: +44 (0)20 7529 6500 F: +44 (0)20 7529 6556

Lyon
11, rue de la République, 69001 Lyon, France
T: +33 (0)4 72 10 29 29 F: +33 (0)4 72 10 29 28

Manchester
25th Floor, City Tower, Piccadilly Plaza
Manchester M1 4BT United Kingdom
T: +44 (0)161 236 0282 F: +44 (0)161 236 0095

Marseille
76, rue de la République, 13002 Marseille, France
T: +33 (0)4 91 37 35 15 F: +33 (0)4 91 91 90 14

Paris
12-14, rue Jules César, 75012 Paris, France
T: +33 (0)1 53 17 36 00 F: +33 (0)1 53 17 36 01

Woking
Dukes Court, Duke Street, Woking
Surrey GU21 5BH United Kingdom
T: +44 (0)1483 728051 F: +44 (0)1483 755207

Email: info@mvaconsultancy.com

Offices also in
Bangkok, Beijing, Hong Kong, Shenzhen and Singapore

mvaconsultancy