May 2010

Ofwat Price Review (PR09) –
Bristol Water Final Determination

A report prepared for

CONSUMER COUNCIL FOR Water

Judith Lawrence
Associate Director
+44 (0)161 615 2300
jlawrence@harrisinteractive.com

Ian Marshall
Senior Research Manager
+44 (0)161 615 2300
imarshall@harrisinteractive.com

Report version: v6	Date issued to CCWater: Friday 28th May 2010	
Primary author: Ian Marshall	Proof read by: Judith Lawrence Date: Weds 19th May	
Q/C table totals add up	Checked by: Ian Marshall	Date: 18th May
Q/C labels on figures/charts	Checked by: Ian Marshall	Date: 18th May
Check figures in tables	Checked by: Ian Marshall	Date: 18th May
Q/C report text – grammar spelling	Checked by: Ian Marshall	Date: 18th May
Q/C report text – plain English/clarity	Checked by: Ian Marshall	Date: 18th May

Table of Contents

List of Tables

List of Charts

1. Executive Summary

1.1 Introduction

1.1.1 In February 2010, the Competition Commission began an investigation into an appeal made by Bristol Water against the Final Determination of their prices for 2010-2015 made by Ofwat (the economic regulator of the water industry in England and Wales) as part of the 2009 Price Review process (PR09).

1.1.2 This research was commissioned by CCWater in order to provide evidence of customers' views on the acceptability of two alternative pricing and investment options:

- Bristol Water's Final Business Plan (an average 29% increase in bills over the next five years to 2015 taking the average household water bill from £157 to £202) and;
- Ofwat's Final Determination for Bristol Water (an average 7% increase in bills over the next five years to 2015 taking the average household water bill from £157 to £168).

These two options were presented to respondents in an anonymised format so they could not be linked to either Bristol Water or Ofwat.

1.2 Overview of the Methodology

1.2.1 A total of 437 interviews were carried out between April 12th and 26th 2010 with a representative sample of Bristol customers. The majority of the interviews (272) were carried out online and the rest face-to-face (165). The face-to-face interviews ensured that there was adequate representation of the offline population.

1.2.2 The online data was propensity score adjusted[1] prior to being combined with the face-to-face results and the resulting data set was weighted to ensure that it was representative to within +/- 5% of the census population for the Bristol region. There was no need to weight for meter usage as the proportion of metered respondents in the sample (28%) was close enough to the proportion of metered households in Bristol Water's supply area.

[1] To minimise potential demographic and attitudinal biases from the self-selected nature of online panels, Harris Interactive has developed a weighting technique (propensity score adjustment) to ensure that results are projectable to the entire general population or subgroups of it.

1.3 Main Findings

1.3.1 The findings of this survey would not appear to have been swayed by Bristol's recent media activity, nor would it seem to have had much effect on customers' views of the company (section 3.1.1).

1.3.2 Two-thirds of customers say they have experienced a problem with their water service since being a Bristol Water customer, but the extent and seriousness of the problems appears limited. These findings could explain why customers do not see the need for the extra investment that Bristol is proposing (section 3.1.2).

1.3.3 The four aspects of water service examined in this survey (maintaining the network of water supply pipes, managing the network to reduce disruption, managing water usage and safety of tap water) are extremely/very important to the vast majority of customers (over four-fifths) (section 3.3.1).

1.3.4 Satisfaction with the current levels of service is high, with all four of the above services being rated four out of five or more. This may explain why customers see little or no need for the more costly investment plans proposed by Bristol (section 3.3.1).

1.3.5 Half of Bristol's customers feel that their combined water and sewerage bills[2] represent good value for money, water more so than sewerage services. Customers' perceptions of current value for money have an impact on the way they respond to Bristol's future plans. Those with positive perceptions of value for money are more likely to accept higher charges (section 3.2.1).

1.3.6 The service levels proposed in the Bristol Final Business Plan and the Ofwat Final Determination are both equally acceptable to customers. This suggests that customers do not see the benefit of the additional investment priorities proposed by Bristol (section 3.4.1 and 3.4.2).

1.3.7 However, the picture changes markedly when the associated price increases come into play and Bristol's plan becomes far less acceptable to customers. Only a fifth accept the proposed £45 price increase associated with Bristol's plan whilst 61% do not (a net 42% unacceptable rating), whereas more accept Ofwat's price increases

[2] Whilst Bristol Water provided water supply services to all respondents, sewerage services and the associated charges were provided by Wessex Water, Severn Trent Water or Thames Water. Where sewerage services were provided by Wessex Water, customers received a single bill which shows Bristol's water charges and Wessex's sewerage charges under a joint brand.

than do not (49% versus 31%), giving a net acceptability of 18% (sections 3.4.1.3 and 3.4.2.3).

1.3.8 When given a straight choice between the two plans, the Ofwat plan is preferred by 64% and the Bristol plan by 14%. Respondents who chose the Ofwat plan did so primarily for cost reasons, reinforcing the view that customers are not prepared to pay for service proposals which they do not feel are necessary (section 3.4.3.2).

1.3.9 Further evidence that customers are more interested in keeping price increases to a minimum, rather than paying for enhanced services, is shown by their reaction to price differences for two of the individual service areas (for **managing water usage** see section 3.3.3 and for **managing the network to reduce disruption** see section 3.3.5).

1.3.10 Customers' views on the affordability of Ofwat's Final Determination are similar to their views on the affordability of current water and sewerage bills, whereas Bristol's Final Business Plan has many more customers saying they cannot afford it than can afford it. Half consider Bristol's Final Business Plan (Plan A) to be unaffordable, and just over a quarter say it would be affordable, with the rest being undecided. This gives a net minus 23% affordability rating. Ofwat's Final Determination (Plan B) is more affordable, with just under a half (46%) feeling that they could afford it, about a quarter (26%) saying they could not and the rest being undecided. This gives a net affordability rating of plus 20% (see sections 3.4.1.4 and 3.4.2.4).

2. Introduction

2.1 Background to the Research

2.1.1 Every five years, through an extensive review process, Ofwat sets limits on the prices water companies in England and Wales can charge customers over the coming five year period. Ofwat's aim is to ensure that these charges represent the best value for money for consumers and encourage the water companies to operate efficiently and provide a sustainable service.

2.1.2 This review process (referred to as PR09) comprised a number of key stages;

- Late 2007 – each company published its Strategic Direction Statement (**SDS**) to set out its 25 year forward look against which its five year business plans were framed;
- June 2008 – findings of deliberative research into consumers' priorities for the price review process (**PR09**) were published[3];
- August 2008 – each company published a Draft Business Plan (**DBP**)
  - Outlining investment proposals for services over the next five years, and the related impact on customers' bills from 2010 to 2015;
- December 2008 – quantitative joint stakeholder research[4] conducted into customers' views of the acceptability of DBPs;
- April 2009 – each company went on to publish a Final Business Plan (**FBP**);
- July 2009 – Ofwat published its Draft Determinations (**DDs**) in response to the FBPs;
- August 2009 – CCWater's research conducted into customers' views of the acceptability of Ofwat's DDs[5], published in October 2009;
- November 2009 – Ofwat published its Final Determinations (**FDs**);
- January 2010 – cut off point to appeal price limits to the Competition Commission
- February 2010 to August 2010 – Competition Commission's re-determination of price limits.

[3] Deliberative joint stakeholder research published June 2008. This identified consumers' views on investment priorities for the water industry from 2010 to 2015. The joint stakeholders were: Consumer Council for Water (CCWater), Department for Environment, Food
and Rural Affairs (Defra), Drinking Water Inspectorate (DWI), Environment Agency (EA), Natural England (NE), Water Services Regulation Authority (Ofwat), Water UK (WUK), and the Welsh Assembly Government (WAG).
[4] Quantitative joint stakeholder research published February 2009. This was a survey of more than 6,000 customers' views on investment and pricing proposals set out in water companies' DBPs. The joint stakeholders are as per footnote 3.
[5] CCWater's research into customers' views on Ofwat's DDs was published in October 2009. This was a survey of nearly 4,700 customers.

Following the publication of Ofwat's FDs, only one company chose to use the appeal process – Bristol Water (hereafter referred to as Bristol).

One of the key stakeholders in this process is the Consumer Council for Water (CCWater). CCWater's role is to ensure the consumers' collective voice is heard in the water debate and that consumers are at the heart of the water industry's thinking.

2.1.3 The views of customers are thought likely to be a key issue for the Competition Commission's deliberations. In order to provide authoritative written and/or oral evidence to the Competition Commission, CCWater commissioned research in order to test customers' views on the acceptability of:

- Bristol's FBP (an average 29% increase in bills over the next five years to 2015 taking the average household water bill from £157 to £202) and
- Ofwat's FD (an average 7% increase in bills over the next five years to 2015 taking the average household water bill from £157 to £168)

2.1.4 This research is particularly important given there have been several notable changes over the ten months since CCWater published its DD research:

- Ofwat's FD provided Bristol with an increase in investment and consequently customers' bills increased from the average 3% reduction announced at DD; and
- Although officially out of recession the economic outlook remains uncertain – particularly in the Bristol area where there have been notable rises in unemployment from 5.1% in 2008 to 7.2% in the year October 2008 to September 2009. Examples of this include Kraft's announcement earlier this year of the closure of the Cadbury's factory at Keynsham with the loss of around 500 jobs.

2.2 Research Objectives

2.2.1 The overall objective of the research was:

'To test customers views on the acceptability of Bristol's FBP and Ofwat's FD with a view to providing evidence to the Competition Commission to assist in their re-determination of Bristol's price limits'

2.2.2 The specific research objectives covered were:

a) Setting the Scene

- To understand perceptions of value for money of current water and sewerage services received; and
- To establish how affordable consumers believe their current water and sewerage bills are

b) Investigating Acceptability

- To find out and compare how acceptable the investment, service proposals and proposed price changes are for:
  - Bristol's FBP
  - Ofwat's FD
- To explore the impacts of the transition to Ofwat's FD in terms of:
  - Establishing whether there are any services or other investment areas in Bristol's FBP which were excluded from the FD but which customers would have been a) supportive of and b) accepting of the associated cost impact on their bills
- Or are the service levels and investment/improvement areas of the FD preferable – if so why?

c) Understanding Affordability

- To find out how affordable (to them personally) people find the bill impacts of the FBP and FD
- To gauge consumer perceptions on the affordability of water and sewerage charges in the foreseeable future

2.3 Methodology

2.3.1 Sample

2.3.1.1 Given the need to provide reliable evidence to the Competition Commission, a target of 400 interviews was set in order to provide a robust sample. This target comprised 300 online interviews and 100 face-to-face interviews with the face-to-face designed to capture the views of the 'hard to reach' population i.e. those less likely to be members of online panels such as the elderly or people on lower incomes. The target of 400 was over-achieved as 437 interviews were conducted in total, comprising 272 online and 165 face-to-face. This was due to limited online sample being available in the Bristol region and the decision being made to increase the target for face-to-face interviews from 100 in order to make up any online deficit and to ensure that a minimum of 400 interviews could be achieved overall.

Table 1 shows the accuracy of this sample size at the 95% confidence level. The range of accuracy depends on the percentage response to the question. So, for example, if 50% of the sample answered yes to a question, we can be 95% sure that response of the total population, had they been surveyed, would be within +/– 4.7% of 50%.

Table 1 – Statistical reliability of a sample of 437 respondents

% giving a particular response to a question	+/-
5% or 95%	2.0
10% or 90%	2.8
20% or 80%	3.8
30% or 70%	4.3
40% or 60%	4.6
50%	4.7

2.3.1.2 A mixed methodology of online and face-to-face interviews was used for the following reasons:

- Online research provided not only a cost-effective way of interviewing a relatively large sample of Bristol customers in a short timeframe but also ensured that the views of both rural and urban based respondents were included within the research
- Given the size of the Bristol region and the potentially limited number of online panel customers within this area, it was necessary to supplement the online

interviews with additional face-to-face interviews to achieve the required minimum sample size of 400. The inclusion of face-to-face interviews also ensured that the views of offline 'hard to reach' customers could be fully represented in the research.

2.3.1.3 The online sample came from two sources: a panel provided by Ciao (a Harris Interactive approved supplier of online sample/panel) and our own proprietary panel HPOL. The face-to-face interviewers, working against set quotas, used their local knowledge to identify the most appropriate areas in which to find low income/vulnerable respondents within the Bristol region.

All respondents were screened to ensure they were the sole or joint bill payer and that they were a Bristol customer. Respondents obtained sewerage services from one of three providers, predominantly Wessex Water, as shown in Table 2 below.

Table 2 – Sample profile by sewerage services provider

Sewerage Provider	%
Wessex Water	87
Severn Trent Water	4
Thames Water	5
Septic tank	4
Total	**100**
Base: All respondents (437)	

2.3.2 Questionnaire

2.3.2.1 The questionnaire was designed in conjunction with CCWater (a copy is included at Appendix 4.2). A pilot survey of 22 face-to-face and 16 online interviews was carried out prior to commencing the full fieldwork programme. Feedback from the pilot interviews was positive – the qualification and screening questions were working well in identifying the correct respondents to interview and comprehension of the questions was good. The online responses were similarly re-assuring with the survey running to the anticipated timings and it was therefore agreed to begin the main fieldwork without any changes to the questionnaire.

2.3.2.2 It is important to note that the proposed plans and service levels shown to respondents were always unbranded (i.e. never named or labelled as Ofwat or

Bristol) to remove any potential bias that might occur by linking them with the water company or the regulator.

2.3.3 Analysis and Weighting

2.3.3.1 When data is collected in two different ways (in this case online and face-to-face) there is a chance that differences in results could in part be due to the different collection methods, rather than being true differences in responses. Therefore, prior to merging the two sources of data, the potential mode effect of the online and face-to-face methods was adjusted for by applying a proprietary weighting method, known as **Propensity Score Adjustment** to the online data. This weighting ensures that the survey results are truly representative of the general population, as would be expected in telephone or face- to- face research. It includes socio-demographic weighting plus attitudinal measures that allow for around 90% of biases to be corrected and ensures that the two data sets in this research could be merged seamlessly. A full explanation of propensity weighting is provided at Appendix 5.1.

2.3.3.2 The combined data was then weighted to ensure it was representative to within +/- 5% of the census population for the Bristol region. A full profile of the weighted and unweighted sample is shown at Appendix 5.3.

2.3.3.3 There were no quotas set for metered/unmetered customers and as these proportions fell out of the sample in similar ratios to the target customer base and no weighting was applied. We have assumed that the 5% who did not know whether or not they had a meter probably did not have one, taking the overall figure for un-metered respondents to over 70%.

Table 3 – Sample profile by metered/un-metered customers

	%
Metered	28
Un-metered	67
Don’t know	5
Total	**100**
Base: All respondents (437)	

2.4 Points to Note When Reading This Report

- Weighted data is used throughout
- Figures may not add to 100% due to rounding
- Statistically significant differences in results tables are indicated by an asterisk (*)
- All differences discussed in the text of the report are statistically significant unless indicated otherwise
- Where there are interesting differences in results but the base sizes are too small to be tested statistically, this is always highlighted
- Commentary always precedes the relevant chart or table

3. Main Findings

3.1 Setting the Scene – Impact of Media Coverage and Experience of Water Supply Problems

This section covers two areas which could have influenced the overall findings of the survey:

- After it had appealed Ofwat's FD, Bristol undertook an active media campaign to publicise its proposals on prices/service levels. It was therefore important to measure the impact of this media coverage on perceptions of the company and the way people responded to this survey
- The incidence and extent of water supply problems experienced by customers which could then influence their views on future investment and service levels

3.1.1 Media Coverage

3.1.1.1 Four fifths of respondents (80%) have not seen anything in the media within the previous three months about service improvements or price changes that might be made by Bristol in the future. A further 8% cannot remember if they have or have not seen anything and the rest are fairly evenly split by those recalling price increases (7%) and those hearing about service (6%). As such, only 13% of customers (using the unweighted base, 57 out of 437 respondents), including those who saw 'something else' about service and/or prices recall seeing anything at all in the media.

3.1.1.2 What these 57 customers have seen in the media had a mixed impact on their perceptions of Bristol and the way in which they responded to this survey. Just over one in four said the media input had had a positive effect on their views towards Bristol, whereas slightly over a third reported a negative effect and a quarter no impact at all. A similar pattern is seen in terms of whether the media input affected the way in which these respondents answered the survey. Therefore, overall it seems that the views expressed in this survey have not been swayed one way or another by recent media coverage and the views of those who have seen anything represent a relatively small proportion of the total population.

Table 4 – Impact of media coverage on perceptions of Bristol and response to the survey

Impact of seeing media coverage	On view of Bristol (%)	On Response To Survey (%)
Positive	27	26
Negative	37	36
No impact	25	31
Don't know/can't say	11	7
Total	**100**	**100**
Base: All who have seen media activity (57)		

3.1.1.3 Just over half of those who saw something in the media about Bristol (53%) went on to take further action, primarily looking at Bristol's website, almost a half, or visiting the Ofwat website (around one in ten).

3.1.2 Customers' Experience of Water Supply Problems

3.1.2.1 Bristol customers were asked whether they or any of their household had ever been affected by any of a number of issues in relation to their water supply. Two-fifths of respondents (42%) have not been affected by any issues in relation to their water supply since being a customer of Bristol and just over a quarter (27%) have only suffered one of them. Among all respondents;

- Around a fifth have been affected by a loss of water for a few hours (21%), low water pressure (21%) or poor quality drinking water (19%)
- Around 1 in 7 stated that they have experienced a hosepipe ban[6] (16%) or disruption due to a leak near their home or work place (14%)
- Very few (only 3%) have had prolonged loss of supply

As will be highlighted in the relevant sections below, customers' experiences of service problems does have some impact on the way they think about Bristol and the proposed new service levels and prices.

[6] Bristol have not imposed a hosepipe ban since 1992, however, customers may have assumed that one applied in 2006 as most water companies in southern England imposed water restrictions to combat drought

Chart 1 – Supply/service issues experienced

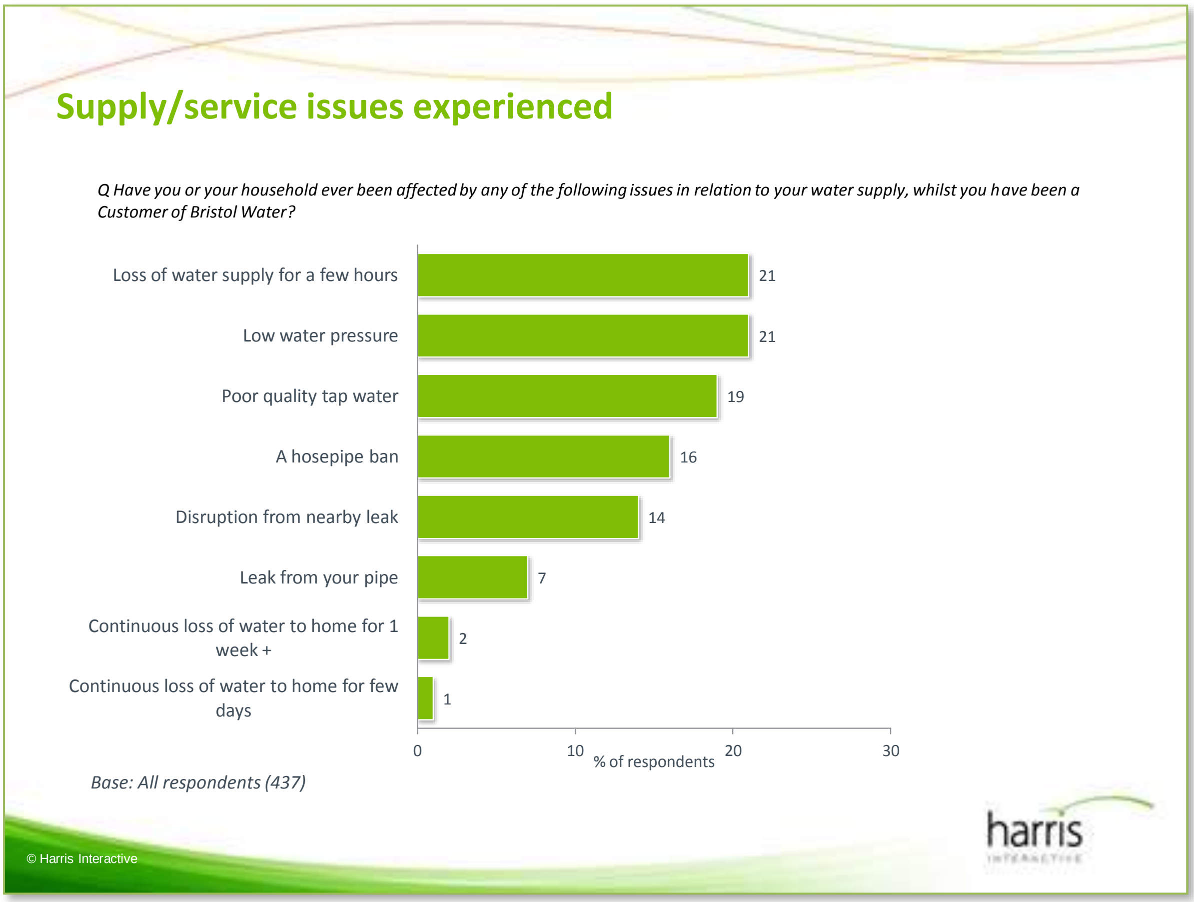


Table 5 – Number of service issues experienced

	%
None	42
One	27
Two	15
Three	6
Four	2
Five	3
Total	**100**
Base: All respondents (437)	

3.2 Perceptions of Value for Money and Affordability

This section covers customers' perceptions of the value for money and affordability of their current combined water and sewerage bill, and the value for money of the water and sewerage elements separately.

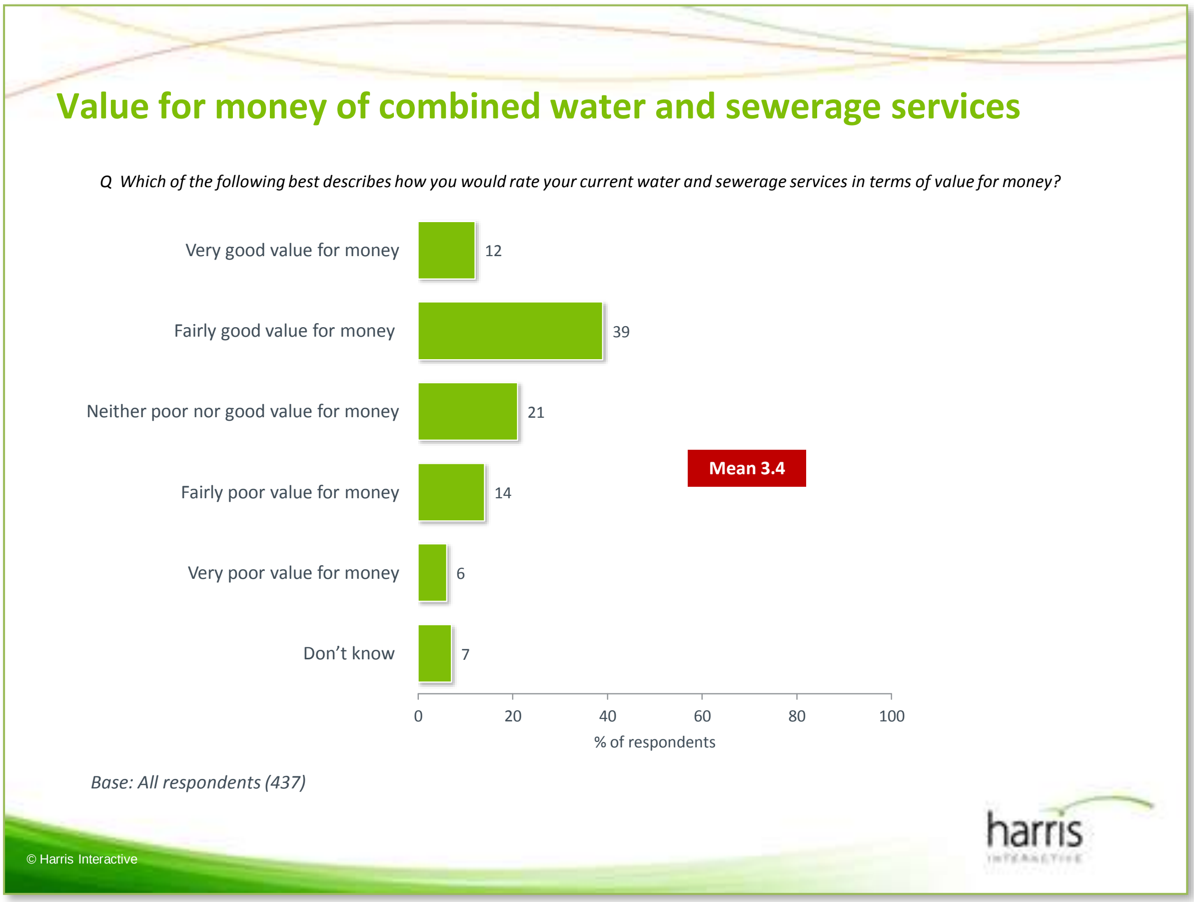
3.2.1 Perceptions of Value for Money of Water and Sewerage Services Bills

3.2.1.1 Just over half of Bristol customers (51%) feel that their combined water and sewerage bills represent very or fairly good value for money, compared to 20% who consider they are very or fairly poor value for money. About a fifth (21%) hold no strong views one way or another. It must be noted at this point that this relates to the combined water supply charges from Bristol and the sewerage charges from Wessex Water, Severn Trent Water or Thames Water.

3.2.1.2 Those who have seen something in the media about Bristol appear more likely to feel that the combined water and sewerage bills represent good value for money than those who have not (78% rating the services as very or fairly good value versus 46%). However, as discussed in 3.1.1., these customers only account for 13% i.e. using the unweighted base equates to 57 respondents out of the total sample of 437.

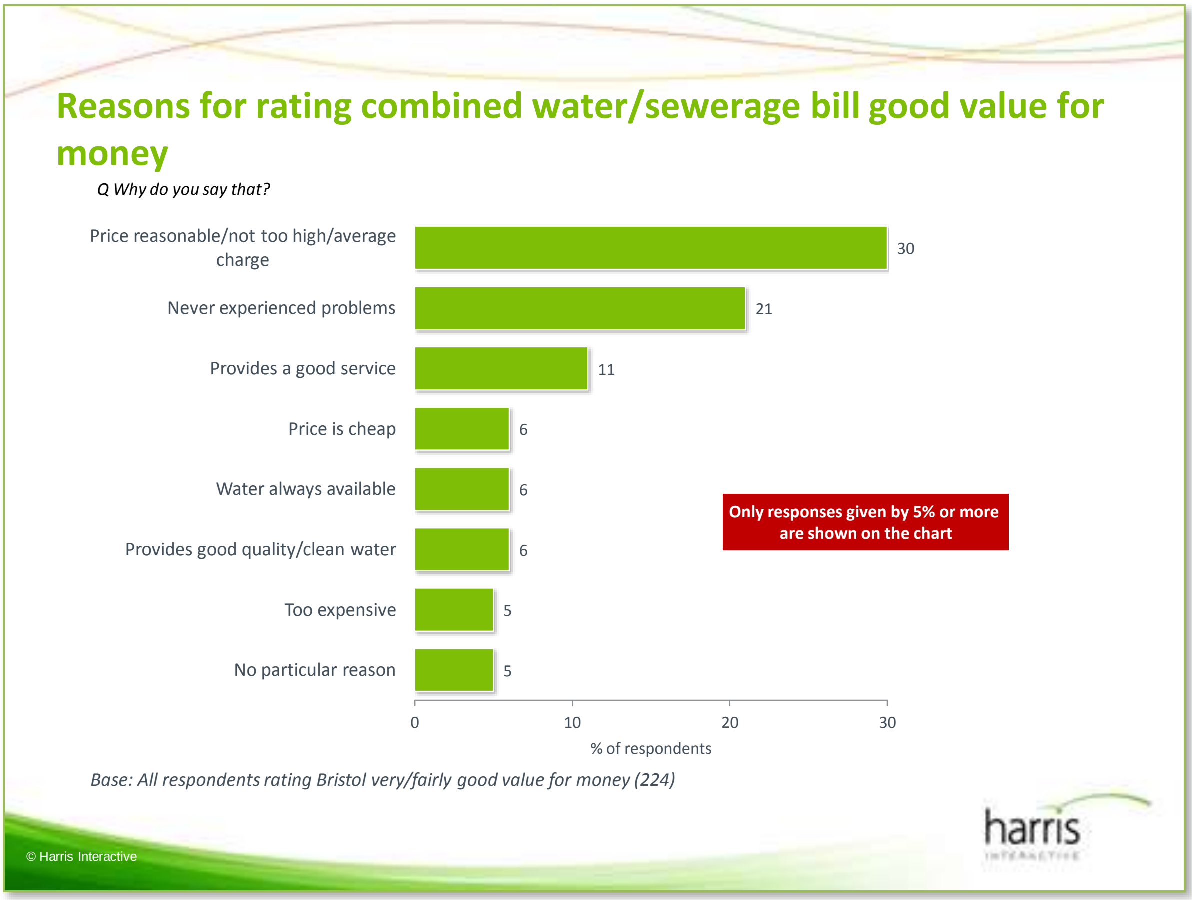
3.2.1.3 Customers who have experienced more than one of the service issues mentioned at 3.1.2.1 are less likely to rate their water and sewerage services as good value for money (22% of those considering Bristol poor value for money had experienced 2 service level issues, compared to only 11% of those rating it good value for money).

Chart 2 – Value for money of combined water and sewerage services bill



3.2.1.4 Respondents rating their combined water and sewerage charges as good value for money were asked why. Almost a third (30%) feel that their charges for combined water and sewerage services are average/reasonable, with a small percentage (6%) even considering them cheap, and therefore overall they consider them to be good value for money. The absence of problems, mentioned by 21%, was the second most cited reason. About a quarter mentioned specific positive aspects of Bristol's operations: good service (11%), water always available (6%) and provides good quality/clean water (6%). Even though they rate the combined service as good value for money, a small number (5%) think that the bills are just too expensive.

Chart 3 – Reasons for good value ratings



It is worth noting that some customers found this question difficult to answer, and tended to say neither good nor poor value, because they have nothing to compare the charges with. For example;

> *"Not really sure how you would classify these services as VFM given that there is no alternative to compare them to and no option but to subscribe."*

A flavour of the comments relating to good value for money is given below.

> *"Because we have never had a problem with either our water or sewage supplies. In many ways it is very good value, but, as pensioners, I would still wish the charges could be less."*

> *"The prices haven't gone up recently and the payments aren't particularly high."*

> *"The water is clean and they enable us to pay monthly at an affordable rate."*

In many cases the perceptions of good or poor value for money depend on personal circumstances.

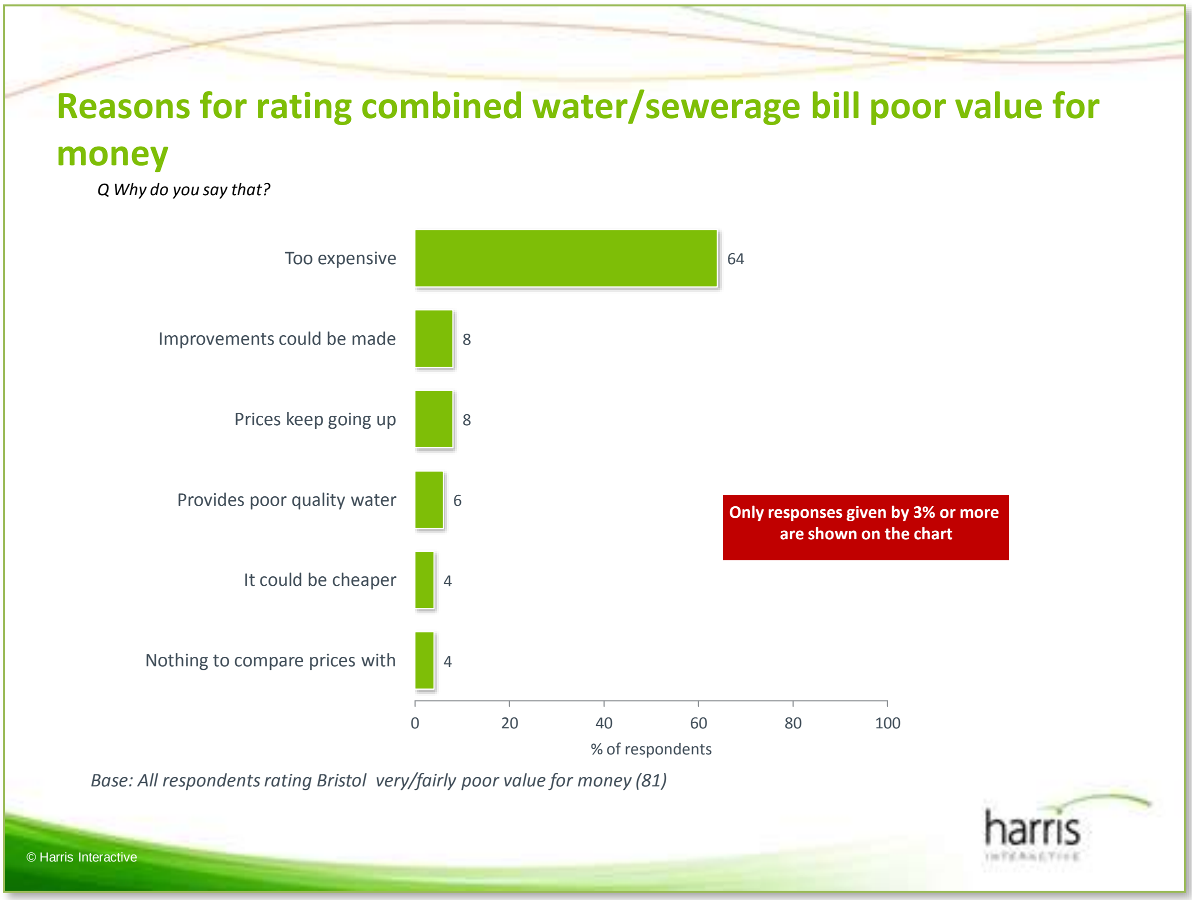
> *"We own a large 4-bed house, have 4 family members and run the washing machine every other day, but the water charges are very reasonable and not excessive."*

Also, some customers on meters feel that the charges are acceptable as they only pay for what they use, whilst, as is shown in the section below, others do not think this way.

> *"Because we changed to a meter we only pay for what we use."*

3.2.1.5 Conversely, customers' reasons for rating their combined water supply and sewerage supply services as poor value for money are predominantly that the service is too expensive (64%) rather than that the service is poor. Only 6% feel that the company provides poor quality water and a slightly higher number (8%) feel improvements could be made.

Chart 4 – Reasons for poor value ratings.



A flavour of the comments relating to poor value for money is given below.

"It seems a lot of money and goes up each year but the service remains the same."

"I'm metered and seem to pay an awful lot of money every month - and I don't even use a bath!"

"It is too expensive. No discounts on water bill, we struggle to pay."

"They leave burst pipes for a number of days. They don't listen to our phones calls. Communication within the company is very poor, a lot of people on the line can't speak English properly, it is very frustrating."

3.2.2 Perceptions of Value for Money – Water Supply and Sewerage Services Individually

Respondents were asked about their perceptions of value for money from Bristol and also their own sewerage supplier using the following current average water and sewerage bill prices for 2009/10;

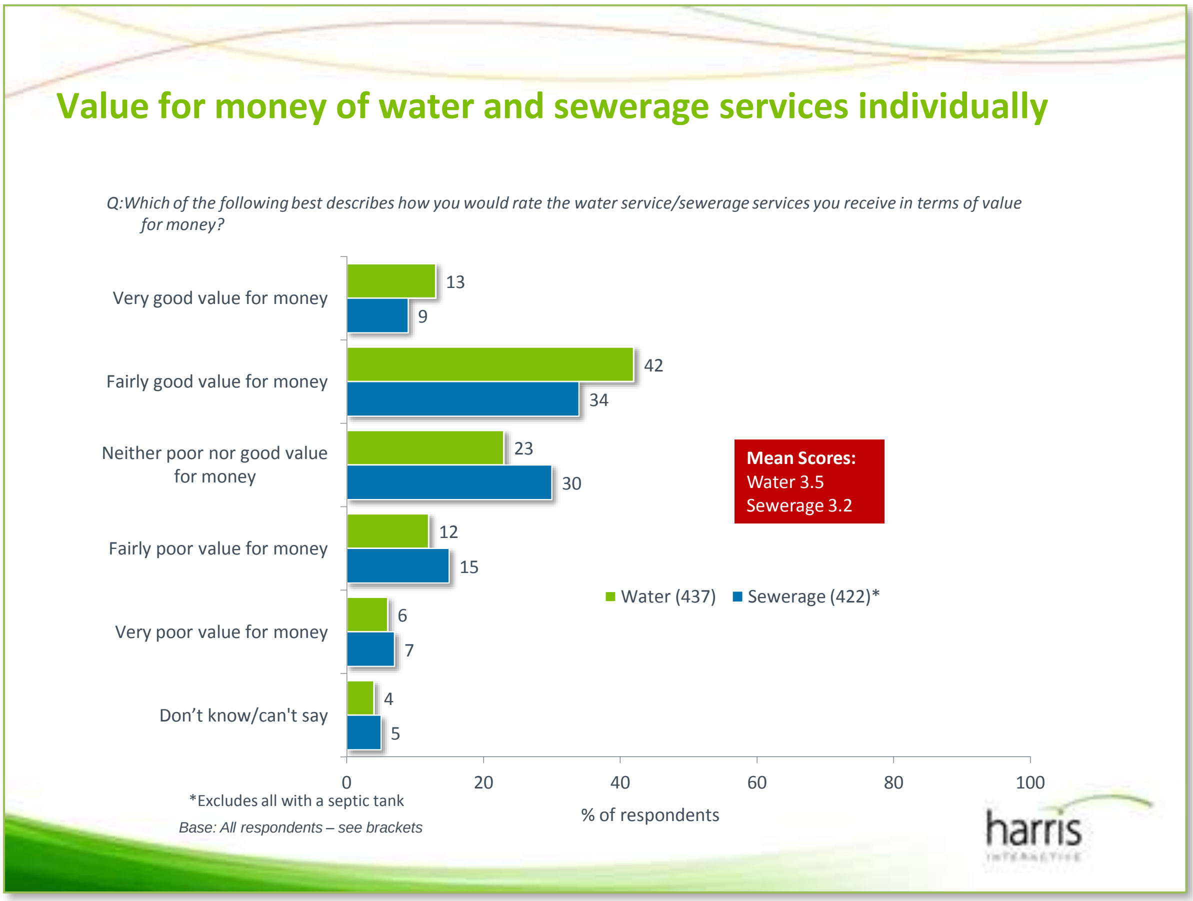
- Bristol Water's average water bill = £157
- Wessex Water's average sewerage bill = £210
- Severn Trent's average sewerage bill = £152
- Thames Water's average sewerage bill = £121

3.2.2.1 Bristol customers feel that the charges for their water supply are better value for money than their sewerage charges. Whilst just over half (55%) think that water supply charges are very or fairly good value for money to some degree, this falls to under half (43%) thinking the same about sewerage bills. As with the combined bill, perceptions of value for money for both water and sewerage services are higher amongst those who recall Bristol's media coverage.

3.2.2.2 As for combined water and sewerage charges, customers who have experienced more than one of the service issues mentioned at 3.1.2.1 are less likely to rate their water and sewerage services as good value for money (23% of those considering Bristol poor value for money had experienced 2 service level issues, compared to only 12% of those rating it good value for money).

3.2.2.3 Customers receiving their sewerage service from Wessex are far less likely to rate it as value for money than customers of the other two providers, Severn Trent and Thames (40% versus 72% and 78% respectively). These thoughts on value for money are in line with actual charges, in that average Wessex bills are the most expensive and Thames the least expensive.

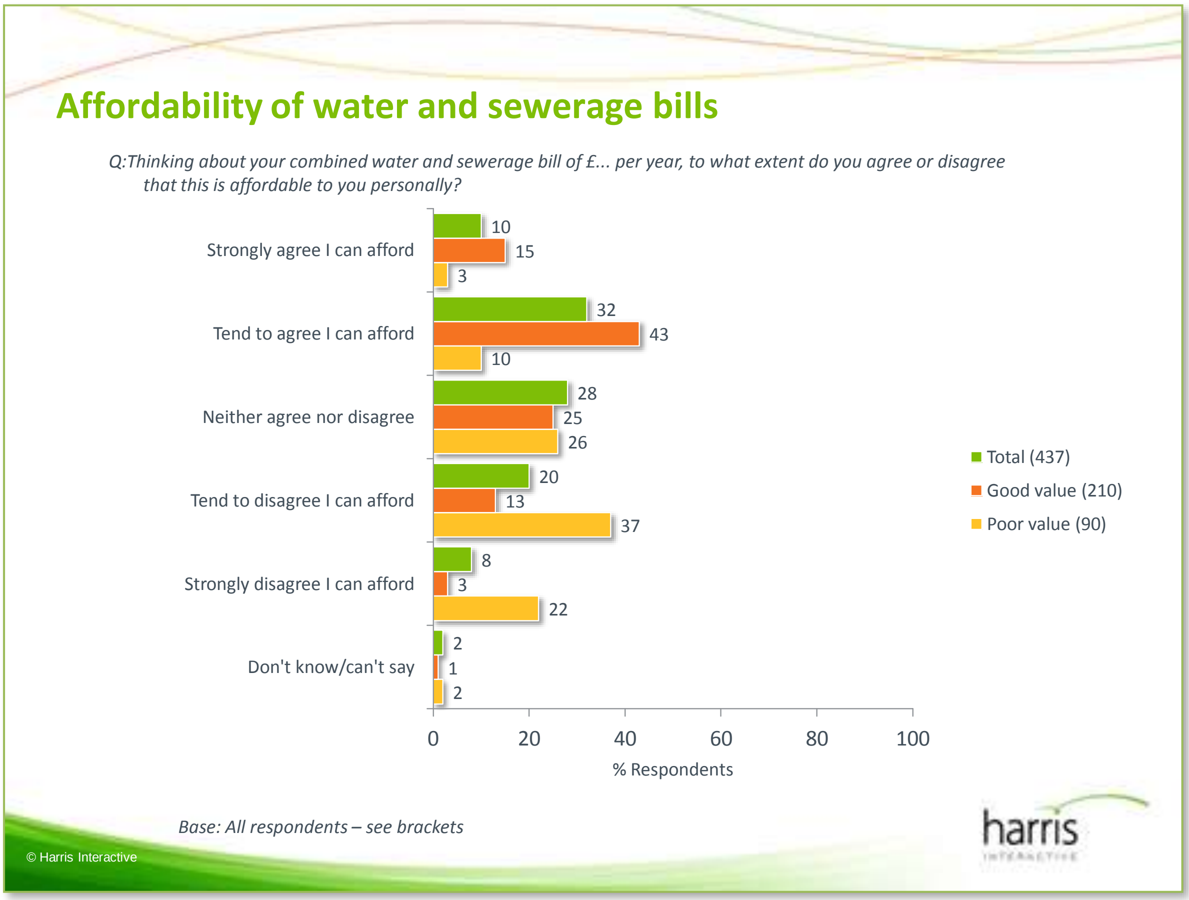
Chart 5 – Value for money of water and sewerage services charges individually



3.2.3 Affordability

3.2.3.1 Customers were asked whether the average combined household water and sewerage bill for Bristol and their particular sewerage service provider was affordable to them personally. More customers tend to agree (42%) than disagree (28%) that their bills are affordable and just over a quarter (28%) neither agree nor disagree. Those that thought their water and sewerage charges are good value for money are significantly more likely to say that they can afford their bills (58%) and the reverse is true of those that rate the services as poor value for money (13%).

Chart 6 – Affordability of combined water and sewerage bills



3.3 The Four Main Components of Bristol's Service Levels

This section covers customers' views on the importance of, and their satisfaction with, the four main elements of Bristol's water service:

- Safety/taste of tap water
- Managing water usage
- Maintaining the network of water supply pipes
- Managing the network to reduce disruption

The order in which each of these service areas was discussed was rotated throughout the interviews, in order to eliminate any order effect bias. This section also looks at customers' views on the alternative service levels/prices that are being suggested by Bristol and Ofwat (although these were not identified to respondents).

3.3.1 Overall Comparison of the Four Service Areas

3.3.1.1 As could be expected, all four service areas are important to customers, with more than 80% deeming each of them extremely or very important. Satisfaction levels are also high, with over three-quarters of customers being very or fairly satisfied with each element of service. Providing safe/good quality tap water tops the list in importance but it is also the area with most dissatisfaction, as shown in the table below. It should be noted that a fifth of respondents (19%) have experienced poor quality tap water in the past and therefore it may be at the forefront of their minds.

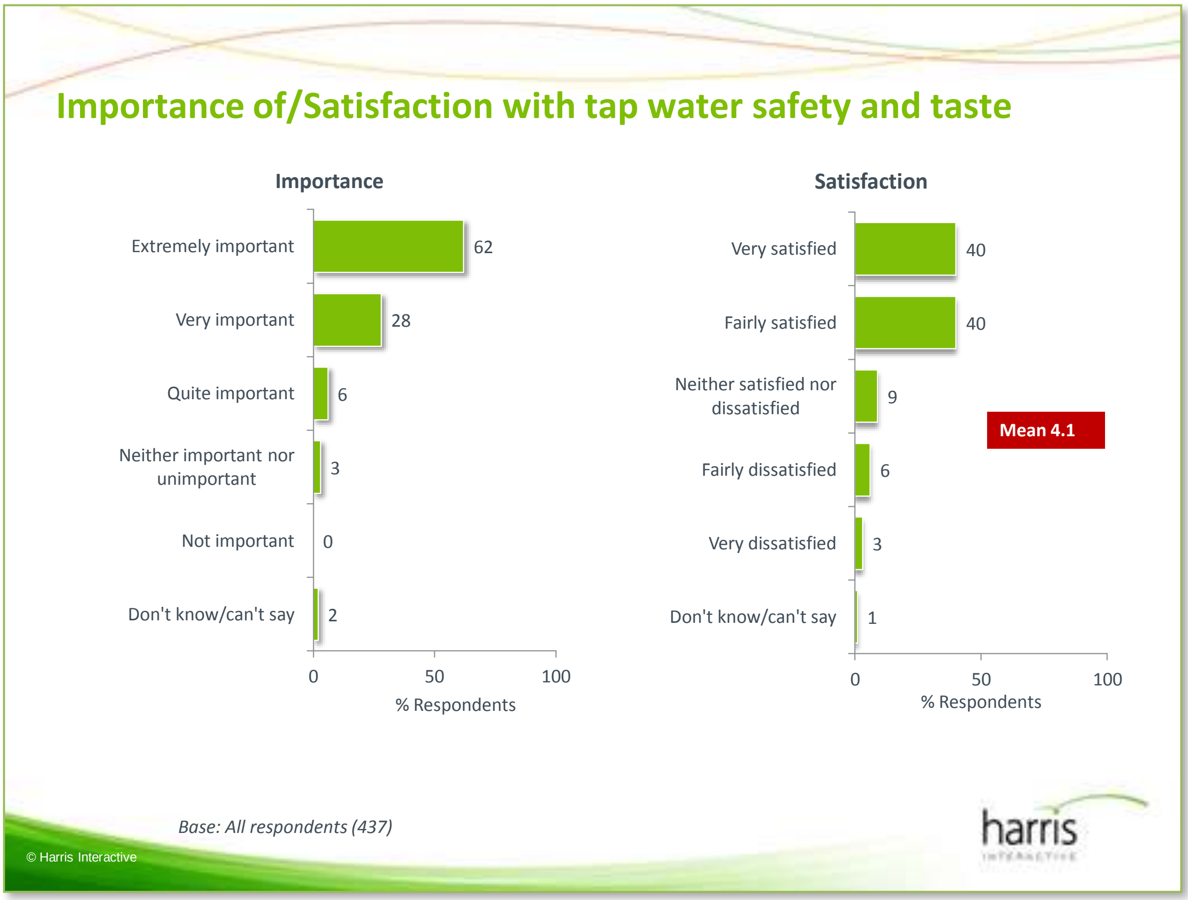
Table 6 – Importance and Dissatisfaction with Service Currently Provided

Service Area	Importance (Extremely/very) %	Dissatisfaction (Very/fairly) %
Safety/taste of tap water	90	9
Managing water usage	86	4
Maintaining the network of water supply pipes	85	6
Managing the network to reduce disruption	81	4
Base: All respondents (437)		

3.3.2 Safety/Taste of Tap Water

3.3.2.1 The safety of tap water is the aspect of water supply service which is most important to Bristol customers. Although satisfaction levels are high, with a mean score of 4.1 out of 5 and 80% reporting they are satisfied, almost one on ten customers are dissatisfied. Those who have experienced poor quality tap water in the past are, not surprisingly, far more likely to be dissatisfied (34%). Nonetheless, just over half (52%) of those customers are satisfied with Bristol's tap water quality.

Chart 7 – Importance of/satisfaction with safety of tap water

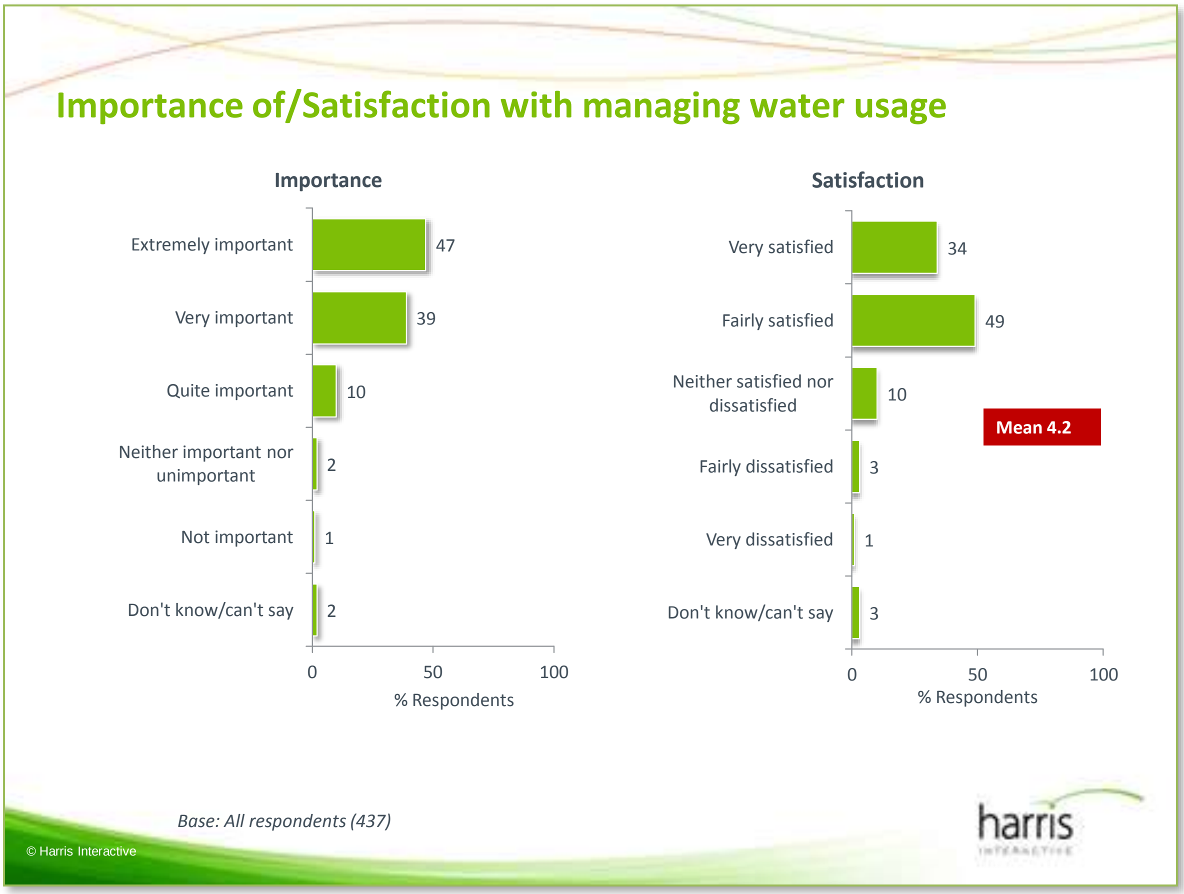


3.3.3 Managing Water Usage

3.3.3.1 Managing water usage was explained as "ensuring there is enough water to go around for everyone" which is achieved by finding and fixing leaks and planning ahead to make sure there will be enough water capacity to meet peoples' needs in the future. This aspect of service was only marginally less important than the safety/taste of tap water, with 86% deeming it to be extremely or very important. Importance is highest amongst those who had lost supply for hours (91%) or weeks (100%) and had reportedly experienced a hosepipe ban (95%).

3.3.3.2 Satisfaction levels for managing water usage were slightly higher than for the safety/taste of tap water, with a mean score of 4.2 and 83% satisfaction. Satisfaction was significantly higher amongst customers rating Bristol's services as good value for money (92% versus 71% rating it as poor value for money).

Chart 8 – Importance of/satisfaction with managing water usage



3.3.3.3 It was explained to respondents that there were two different views as to how much water is needed to meet future population growth and by when. One would make more water available by 2015 and would result in a higher increase to bills than the other, where the additional capacity would only be available by 2020. The scenarios were explained as follows:

Ofwat's FD (but not identified as such to customers)

The first service level makes more water available by 2020 through:

- Reducing leaks by 10%
- Fitting more water meters
- Planning started for a new reservoir
- Reducing the risk of a hosepipe ban from one in 15 to no more than once in 20 years
- Advising customers on how to use water wisely

Bearing in mind that other household bills may go up or down in future, how acceptable would you consider an increase in average water bills of **£9 per year** for the above extra activities?

Bristol's FBP (but not identified as such to customers)

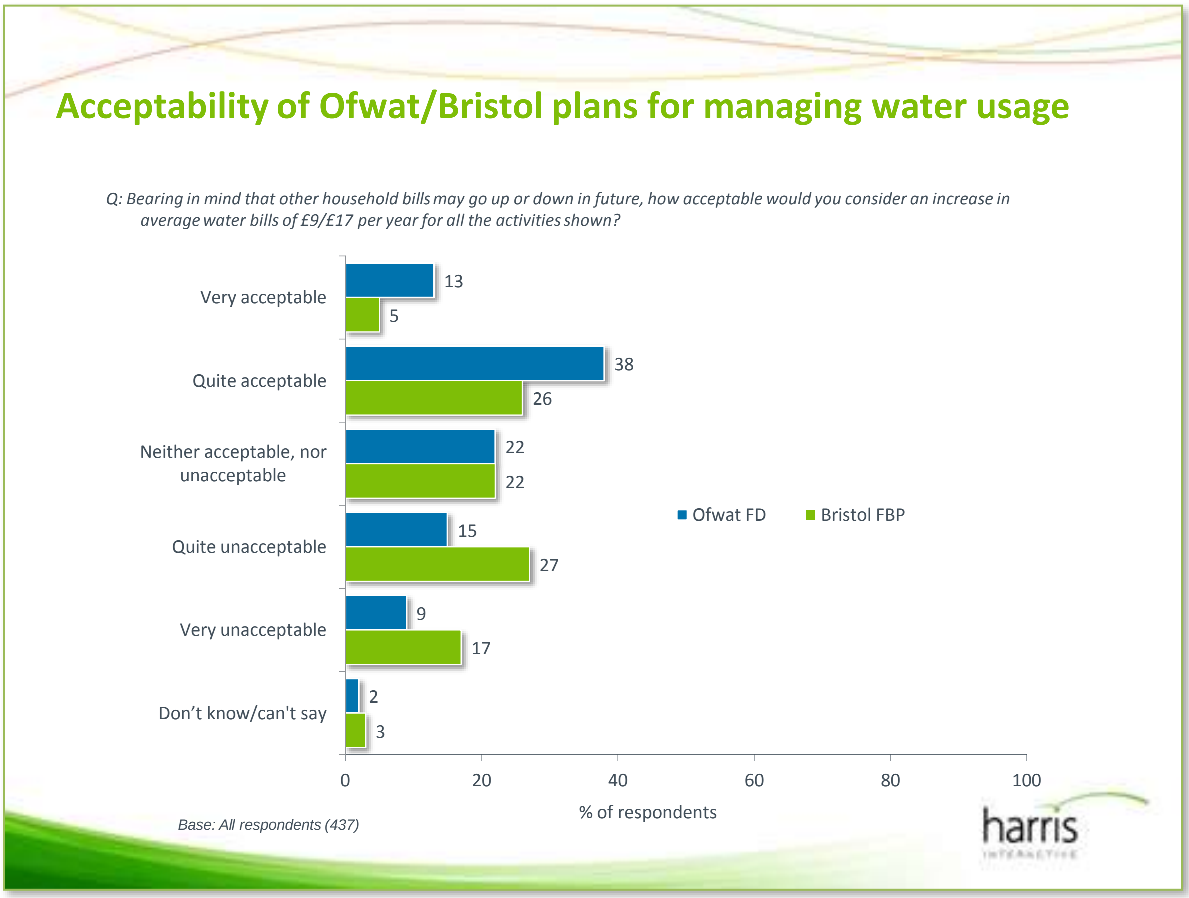
The second service level makes more water available by 2015 through all of the above activities plus:

- Fitting new 'smart' water meters to help customers monitor their water usage and use water wisely
- Bringing the water source at Honeyhurst back in use to increase the amount of water available

Bearing in mind that other household bills may go up or down in future, how acceptable would you consider an increase in average water bills of **£17 per year** for all the activities above?

3.3.3.4 As can be seen from the chart below, half of Bristol's customers (51%) find Ofwat's FD acceptable, compared with less than a third (31%) who consider the more expensive, but accelerated Bristol FBP, acceptable. Almost twice as many find the Bristol FBP unacceptable as Ofwat's FD (44% versus 24%). Those who rate Bristol's water charges as good value for money and those who have seen media coverage are significantly more likely to rate ***both*** plans as acceptable than those that are unhappy with the charges and customers who have not seen anything in the media.

Chart 9 – Acceptability of the Ofwat and Bristol plans for managing water usage



3.3.3.5 Combining the results from both questions shows a mixed picture, but with the overriding view that the lower price is more acceptable to almost half of Bristol's customers. The following table shows the proportion of respondents who rated either the lower priced plan as more acceptable than they rated the higher priced plan or vice versa. For example, they rated the lower priced as very acceptable and the higher priced as quite acceptable or lower.

Table 7 – Acceptability of the two water usage plans

	% mentioning
Lower price more acceptable	46
Both very/quite acceptable	21
Both very/quite unacceptable	16
Higher price more acceptable	5
None of the above*	12
Total	**100**
Base: All respondents (437)	

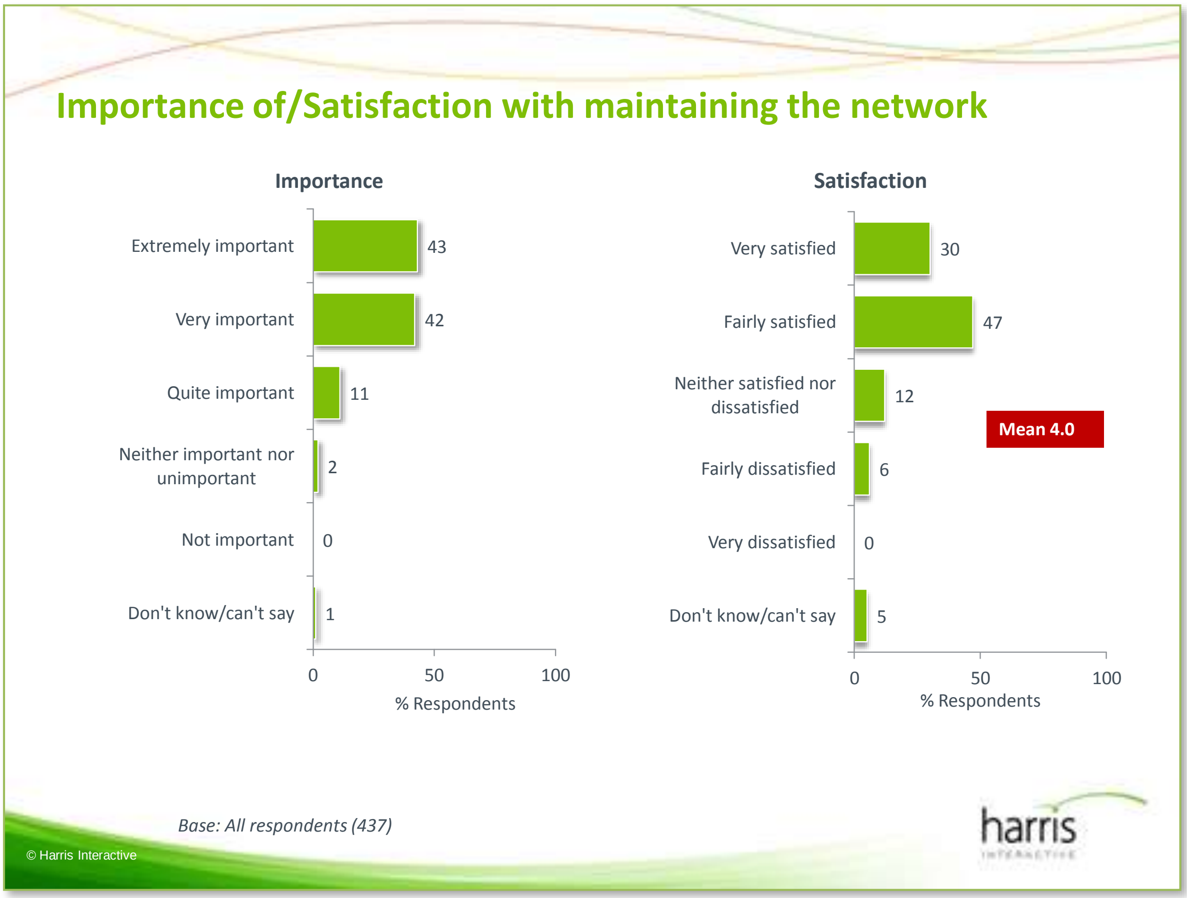
**Those customers coded as ‘none of the above’ either rated the service levels as neither acceptable, nor unacceptable or were unable to give an answer i.e. answered ‘don’t know’.*

3.3.4 Maintaining the Network of Water Supply Pipes

3.3.4.1 Maintaining the network of water supply pipes was explained in the following way: *“Every water company has a network of water supply pipes which they look after via routine and regular maintenance to provide a continuous supply of water to their customers”.* Customers once again feel that this aspect of service is vital, with 85% deeming it to be extremely or very important. Importance is highest amongst those who had lost supply for weeks (100%), had a leak from their water supply pipe (94%) and had experienced a hosepipe ban (93%).

3.3.4.2 Satisfaction levels were slightly lower (although still high) than for the previous two service issues, with a mean score of 4.0 and 77% satisfaction and, once again, those who feel Bristol’s water charges are good value for money have higher levels of satisfaction (85% versus 64% considering Bristol poor value for money).

Chart 10 – Importance of/satisfaction with maintaining the network of water supply pipes[7]



3.3.4.3 The plan for how Bristol can maintain the water supply network was explained in the following way:

Water companies can maintain the water supply network in different ways, and costs depend on how they decide to do things.

There are two views as to how Bristol Water should approach its **routine** maintenance of the water supply network. One is that the network has not had enough investment in the past, and now more money needs to be spent to keep the service as it is; the other view is that it is possible to spend less money and maintain the service level as it is up until 2015 by working more efficiently and in a different way in the future.

Respondents were then asked whether, in principle, they felt they should pay more, less or the same for Bristol to maintain the network of supply pipes and maintain a continuous water supply until 2015. Almost two-thirds (64%) feel that they should pay the same, with similar proportions saying they should pay more (20%) or less (16%). Those that think their current water charges represent good value for money

[7] Where charts refer to 0, this includes figures of <1%

are significantly more likely than those who think they are poor value for money to be willing to pay more to maintain the network of water supply pipes (28% versus 6%).

Table 8 – Payment options for maintaining the network of water supply pipes

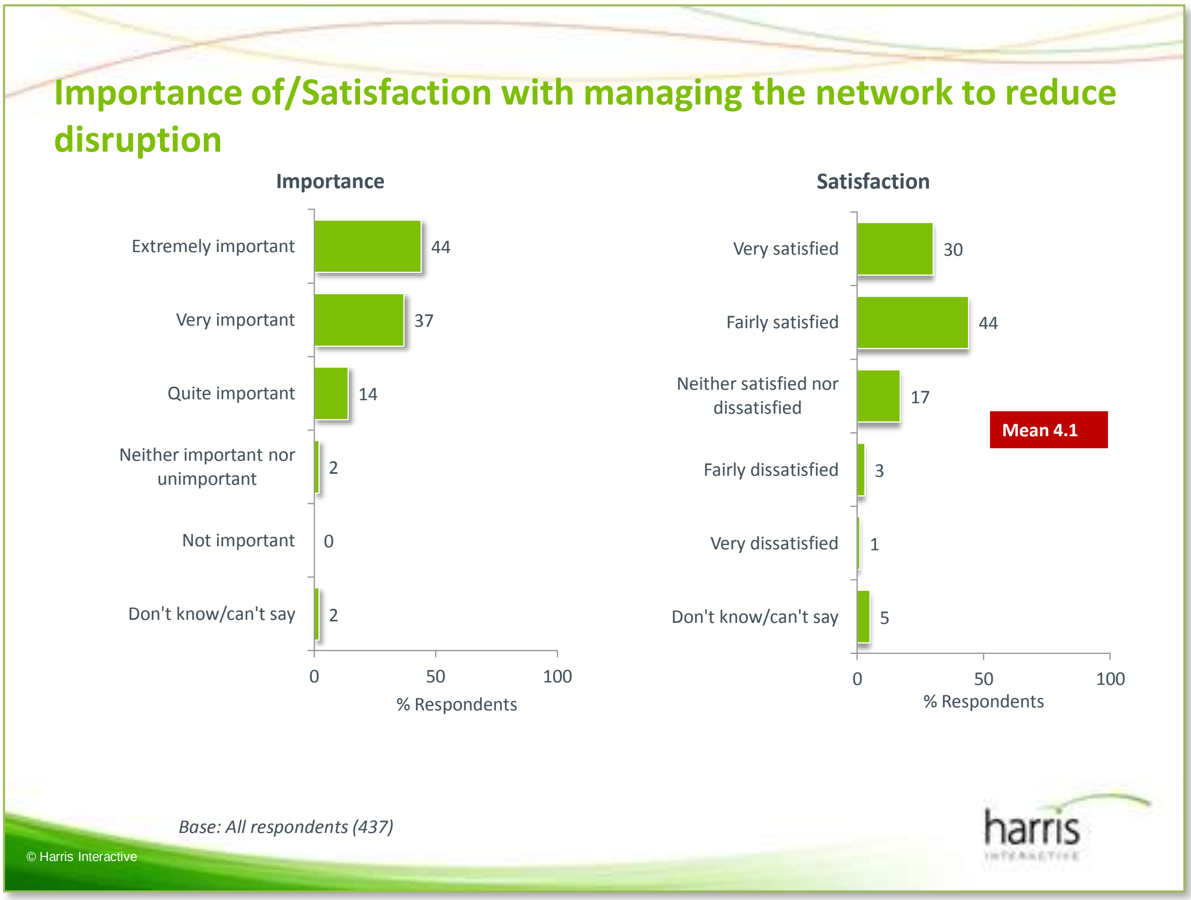
	% mentioning
In principle pay more annually	20
In principle pay the same	64
In principle pay less	16
Total	**100**
Base: All respondents (437)	

3.3.5 Managing the Network to Reduce Disruption

3.3.5.1 Managing the network to reduce disruption was explained in the following way: *"Water companies manage and protect their water supply network from the effects of extreme events such as floods or drought. This is so that in the event of extreme weather, there is less chance of people losing their water supply for long periods of time, such as a week or more".* Although this is the least important aspect of service, it is still important to 81% of customers and particularly so to those who have experienced a hosepipe ban (91%), or had a leak from their property (91%).

3.3.5.2 Satisfaction levels are similar to maintaining the network of water supply pipes, with a mean score of 4.1 and 74% satisfaction and, as for all service aspects, those who feel Bristol is good value for money for water supply services have higher levels of satisfaction (85% versus 52% considering Bristol poor value for money).

Chart 11 – Importance of/satisfaction with managing the network to reduce disruption[8]



3.3.5.3 It was explained to respondents that there were two plans a water company could take to help it manage and protect the supply network from events such as extreme weather, each with a different price per customer.

Plan A (Bristol FBP, although not branded as such)
By 2015, around 4 in 10 people (440,000 in total) would be less likely to experience a lengthy disruption to their water supplies because of extreme weather. This would add an extra **£6** a year to the average water bill

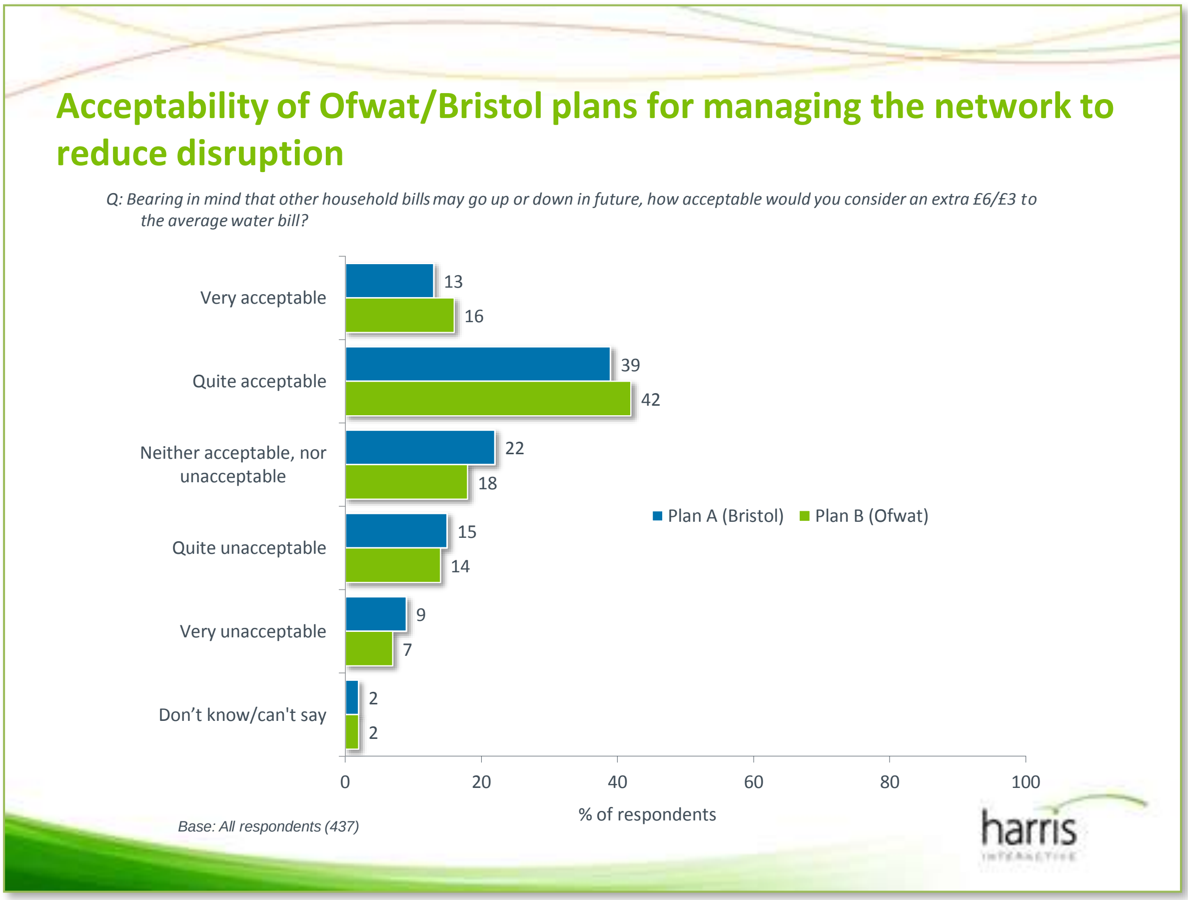
Plan B (Ofwat FD, although not branded as such)
The second level would mean that, by 2015, around 1 in 7 people (185,000 people) will be less likely to experience an extended disruption of water supplies because of extreme weather. This would add an extra **£3** a year to the average water bill.

As can be seen from chart 12, there is very little to choose between the acceptability of both plans (52% finding Plan A with the £6 increase acceptable compared with 58% for Plan B with the £3 increase). Those rating Bristol poor value for money are

[8] Where charts refer to 0, this includes figures of <1%

significantly more likely to find either plan unacceptable than those with good value for money perceptions.

Chart 12 – Acceptability of the Ofwat and Bristol plans for managing the network to reduce disruption



3.3.5.4 Combining the results from both questions shows that both plans are acceptable to over a third (37%), which is over twice as many as find both plans unacceptable, probably because the difference in price increase is relatively small i.e. £6 versus £3. However, twice as many find the lower price more acceptable (23%) than the higher price (11%).

The figures in table 9 below are calculated by looking at the proportions of respondents who rated each question in the same way or who rated one as more or less acceptable than the other.

Table 9 – Acceptability of the two plans for managing the network to reduce disruption

	% mentioning
Both very/quite acceptable	37
Lower price more acceptable	23
Both very/quite unacceptable	16
Higher price more acceptable	11
None of the above*	14
Total	**100**
Base: All respondents (437)	

**Those customers coded as 'none of the above' either rated the service levels as neither acceptable nor unacceptable or were unable to give an answer i.e. answered 'don't know'.*

3.4 Overall Service Acceptability

This section covers the acceptability, willingness to pay for and ability to afford Bristol's FBP (Plan A) and Ofwat's FD (Plan B). The order in which the plans were shown to respondents was rotated once again to eliminate any potential order effect bias.

3.4.1 Views on Plan A (Bristol's FBP)

3.4.1.1 Respondents were asked to read a summary of each of the proposed plans in turn (online) or were given a show card to read (face-to-face). These summarised the four service elements that had been dealt with separately in the previous questions. They were asked first how acceptable the service levels described in the plan would be (without a price tag), then how acceptable these service levels would be if they increased the average water bill by £45 per annum by 2015, taking it **from £157 to £202** (excluding inflation) and finally how affordable this increase would be. A total price for each plan was shown, combining the water increase above plus the various average sewerage charges of the three providers up to the period 2014/15, as follows:

- Wessex average sewerage bill is £200 and combined bill is £402
- Severn Trent average sewerage bill is £140 and combined bill is £342
- Thames average sewerage bill is £133 and combined bill is £335

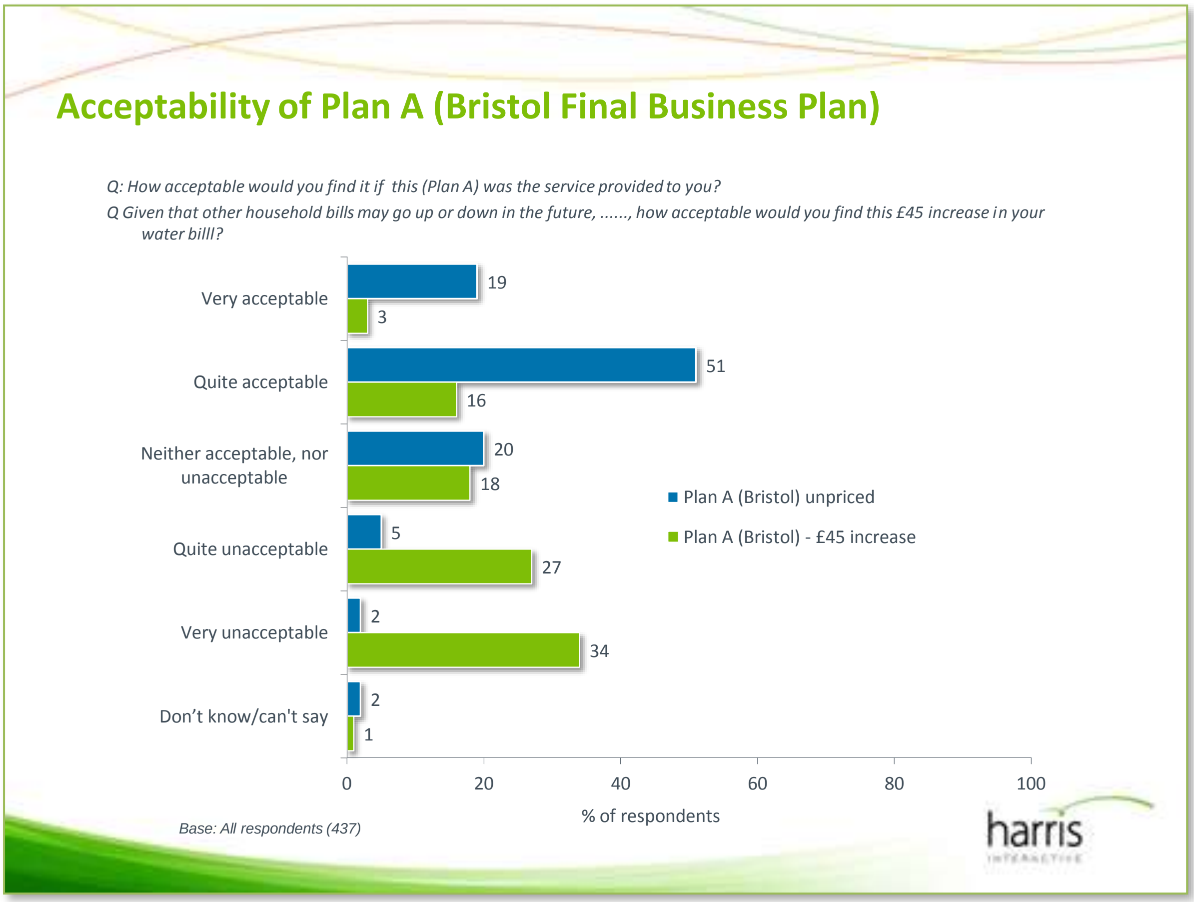
Plan A	
Service area	**Service level provided by 2015**
Maintaining the network of water supply pipes	Manage and repair water pipes, treatment works and equipment to maintain current supplies and quality of drinking water
Ensure the safety of tap water	By using a variety of treatment techniques aim for all samples to meet quality standards for tap water. Currently 99.98% meet the standards.
Ensure there is enough water for everyone by managing water usage, leakage and planning for water in the future	Provide a reliable water supply to existing and new customers, as it is now by: - Reducing leaks by 10% - Fitting more water meters - Helping people use water wisely - Planning a new reservoir at Cheddar - Reducing the risk of a hosepipe ban to no more than once in 20 years - **Plus** bringing the water source at Honeyhurst back into use - **Plus** trying out smart meters
Managing and protecting the network of water supply pipes to reduce the chances of disruption	The chance of losing water supply for a week or more will be reduced for 4 out of 10 people

3.4.1.2 Over two-thirds (70%) feel that Plan A is very or quite acceptable to them, a fifth have no views one way or another and less than 1 in 10 hold the opposite view (7%). So, customers appear to be happy with the service proposals described in the plan.

3.4.1.3 However, the picture changes markedly when the price associated with Plan A, an increase of £45 by 2015, is revealed. At this point, less than a fifth (19%) accept the price increase and just under two-thirds (61%) think it is unacceptable. Those who already rate their combined water and sewerage supply services as poor value for money are much more likely to consider that such a price increase is unacceptable (82% versus only half of those thinking that the current service represents good value for money) as are those who rate their current water supply services as poor value for money (79% versus 53% of those thinking the current service represents good value for money). Customers who have seen something in the media about Bristol’s plans are more accepting of the increased charges than those that have not

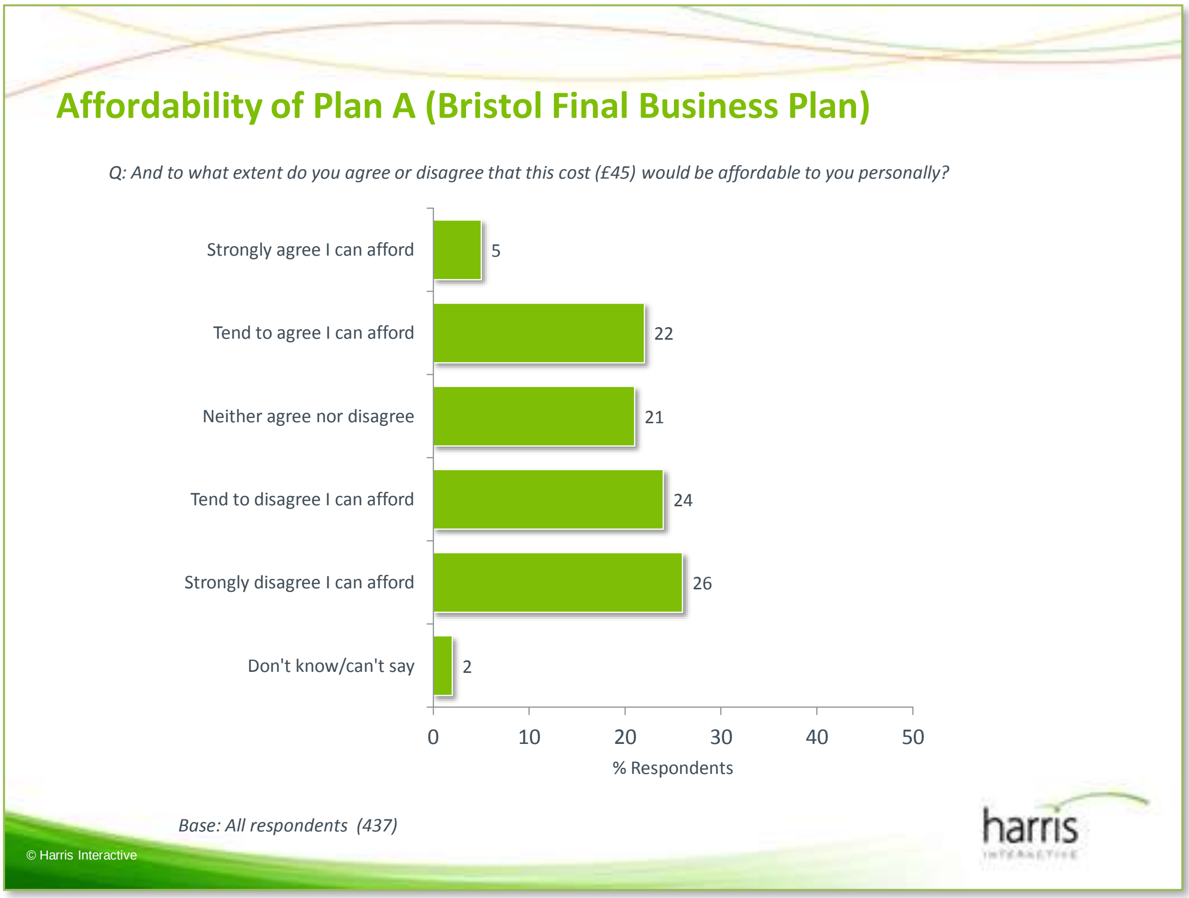
(38% versus 17%) but it is worth noting that this only relates to 13% of all respondents (57 respondents) who had seen something in the media.

Chart 13 – Acceptability of Plan A (Bristol Final Business Plan)



3.4.1.4 Despite most customers (61%) finding the price increase of Plan A unacceptable, fewer (50%) think that the bill would be unaffordable to them personally and just over a quarter (27%) feel that they could afford it. A fifth (21%) responded neither acceptable nor unacceptable and the remaining 2% said they didn't know or couldn't say. Affordability is particularly an issue for those rating Bristol's water supply charges as poor value, as over half (55%) strongly disagree that they could afford this increase in their bills, compared to only 17% of those maintaining that Bristol offers good value for money.

Chart 14 – Affordability of Plan A (Bristol Final Business Plan)



3.4.2 Views on Plan B (Ofwat's Final Determination)

3.4.2.1 When shown Plan B, respondents were asked the same question set as for Plan A but this time the average water bill **increased by an average £11** by 2015 taking it **from £157 to £168** (excluding inflation). A total price for each plan was shown, combining the water increase above plus the various sewerage charges of the three providers, as follows:

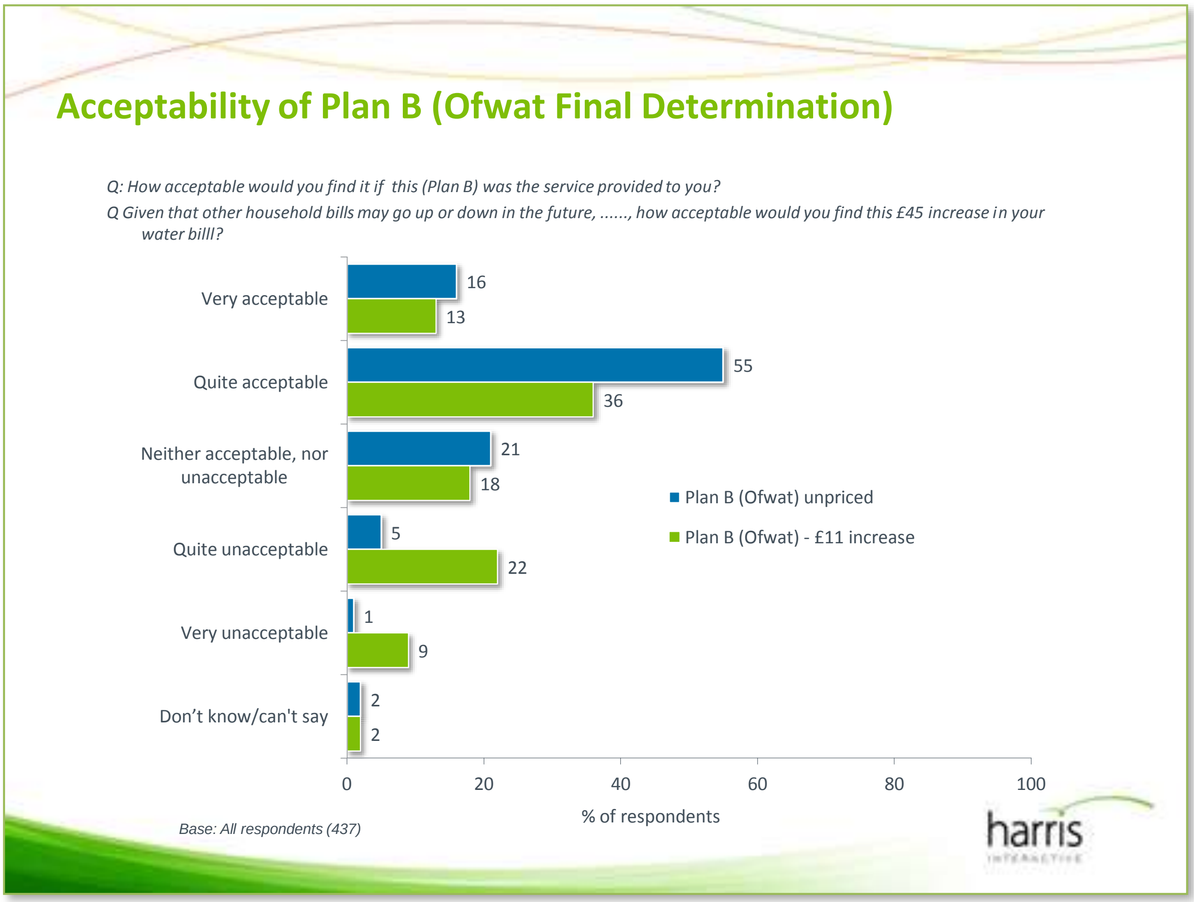
- Wessex average sewerage bill is £200 and combined bill is £368
- Severn Trent average sewerage bill is £140 and combined bill is £308
- Thames average sewerage bill is £133 and combined bill is £301

Plan B	
Service area	**Service level provided by 2015**
Maintaining the network of water supply pipes	Manage and repair water pipes, treatment works and equipment to maintain current supplies and quality of drinking water
Ensure the safety of tap water	By using a variety of treatment techniques aim for all samples to meet quality standards for tap water. Currently 99.98% meet the standards.
Ensure there is enough water for everyone by managing water usage, leakage and planning for water in the future	Provide a reliable water supply to existing and new customers, as it is now, by: - Reducing leaks by 10% - Fitting more water meters - Helping people use water wisely - Planning a new reservoir at Cheddar - Reducing the risk of a hosepipe ban to no more than once in 20 years
Managing and protecting the network of water supply pipes to reduce the chances of disruption	The chance of losing water supply for a week or more will be reduced for 1 out of 7 people.

3.4.2.2 Acceptability of the service proposals outlined in Plan B is at the same level as Plan A (70% acceptable for Bristol's Plan A versus 71% for Ofwat's Plan B) with less than 1 in 10 (7% and 6% respectively) finding it unacceptable.

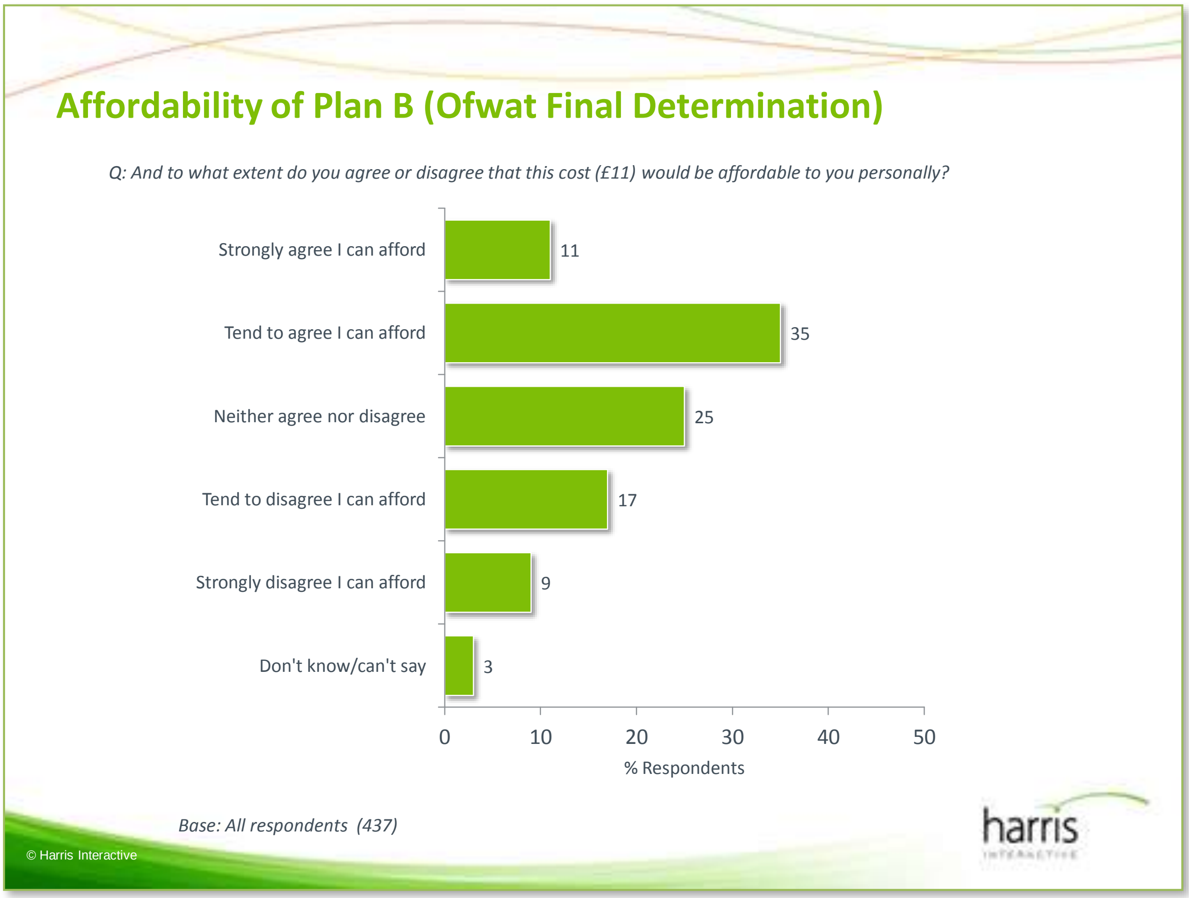
3.4.2.3 The picture changes, but nowhere near as markedly, when the price increase of £11 by 2015 is mentioned. With the increased charges, almost half (49%) approve of Plan B and just under a third (31%) think it is unacceptable. As with Plan A, existing poor value for money ratings for the combined water and sewerage supply and Bristol's water supply service seem to affect acceptance of the new plan (57% and 67% deem the increase unacceptable compared to only 20% and 19% respectively of customers with good value for money perceptions of the combined and water only charges).

Chart 15 – Acceptability of Plan B (Ofwat Final Determination)



3.4.2.4 The affordability of Plan B is the reverse of Plan A. Just under a half (46%) feel that they could afford it, about a quarter (26%) say they could not afford it and the rest are undecided (25% saying neither/nor). This means that almost three-quarters (73%) do not consider an £11 increase to be unaffordable.

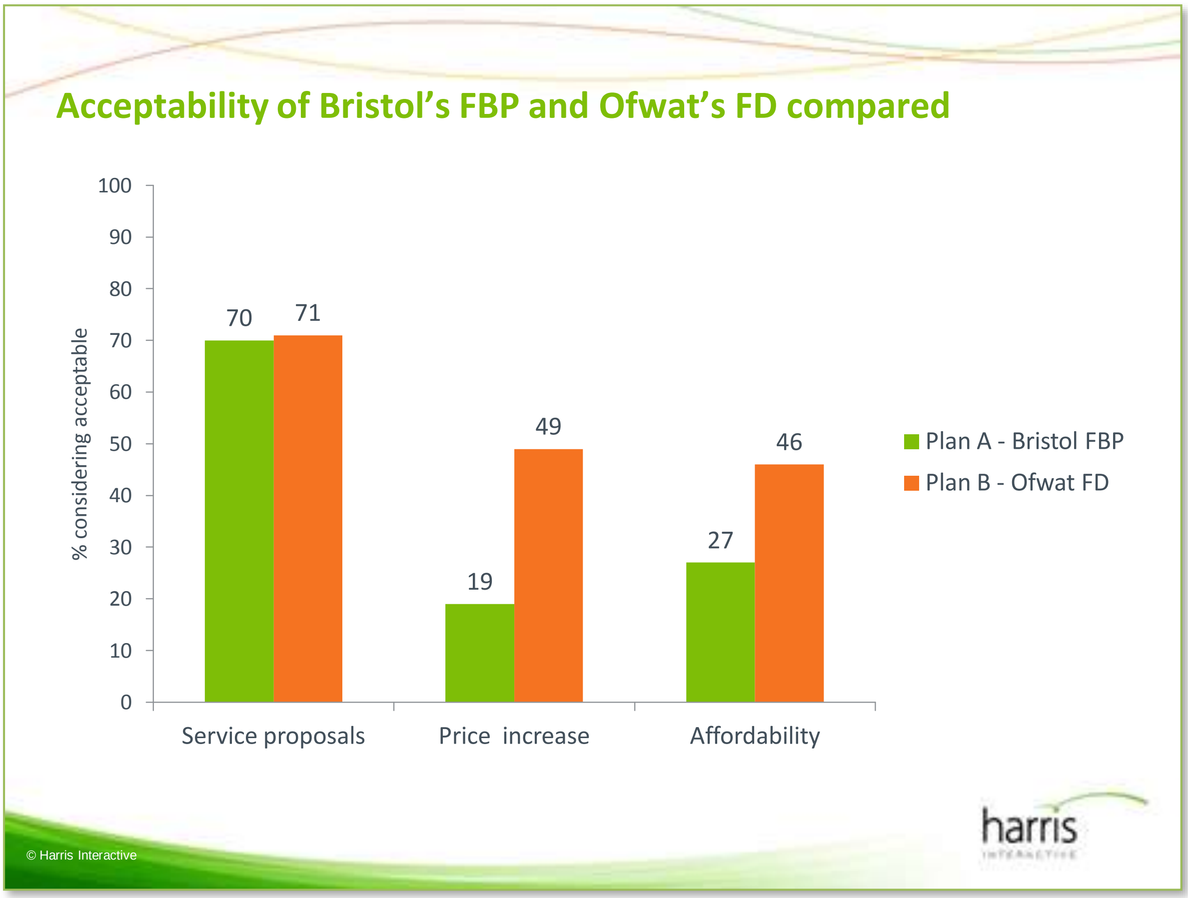
Chart 16 – Affordability of Plan B (Ofwat Final Determination)



3.4.3 Summary of Views on Plans A and B

3.4.3.1 The summary chart below shows clearly that Bristol's FBP is not perceived to be better than Ofwat's FD in terms of its service proposals but that it is far less acceptable price-wise and far less affordable to customers.

Chart 17 – Acceptability of Bristol's FBP and Ofwat's FD compared



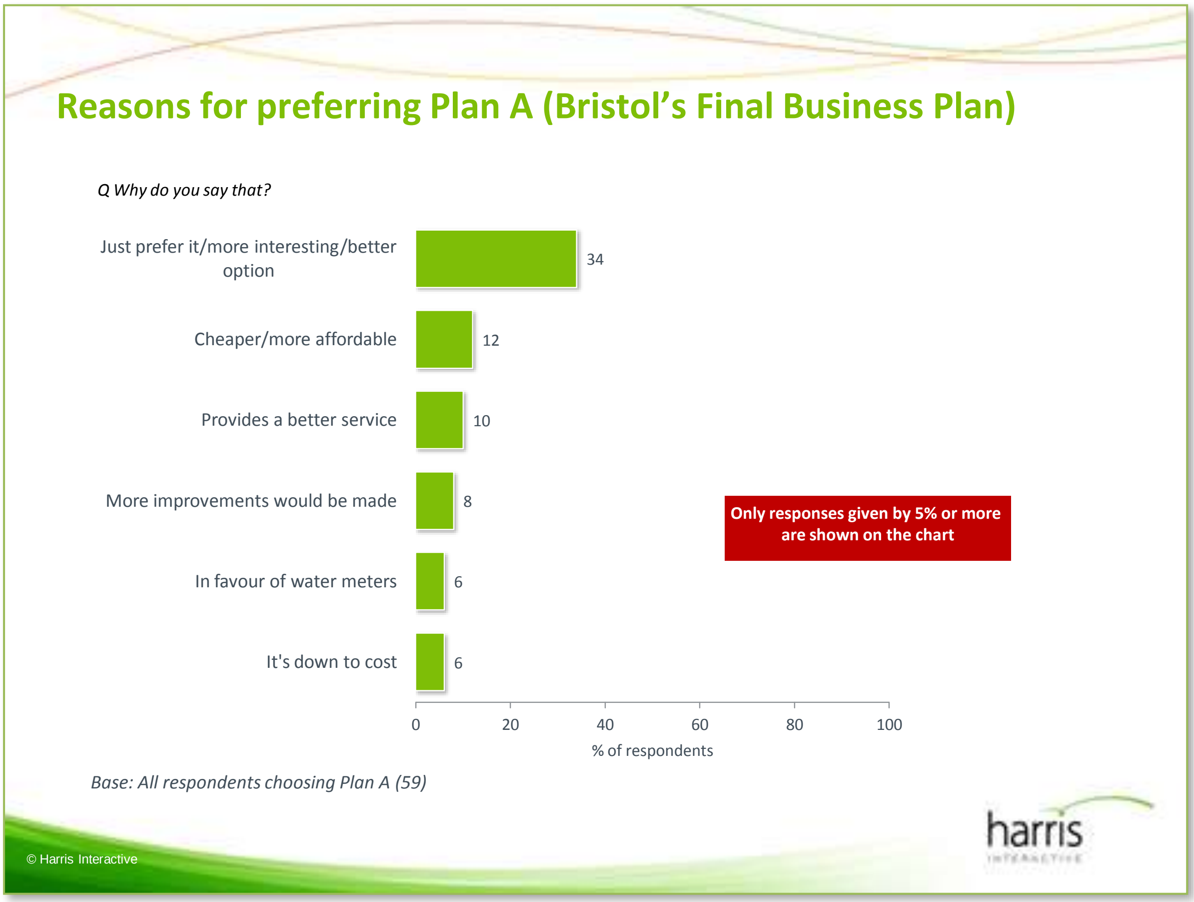
3.4.3.2 If given a choice, almost two-thirds (64%) would prefer Plan B to Plan A. Customers choosing Plan A are more likely to have seen something in the media about Bristol (35% versus 11%) and rate Bristol as good value for money (21% versus 6%).

Table 10 – Preference for Plan A or Plan B if given the choice

	% mentioning
Plan B	64
Plan A	14
Don't know/can't say	22
Total	**100**
Base: All respondents (437)	

3.4.3.2 Customers who would choose Plan A do so primarily because they feel it is a better deal/ is more interesting/better option (34%), is cheaper/more affordable (12%)[9], would be a better service (10%), more improvements could be made (8%) and they are in favour of water meters (6%).

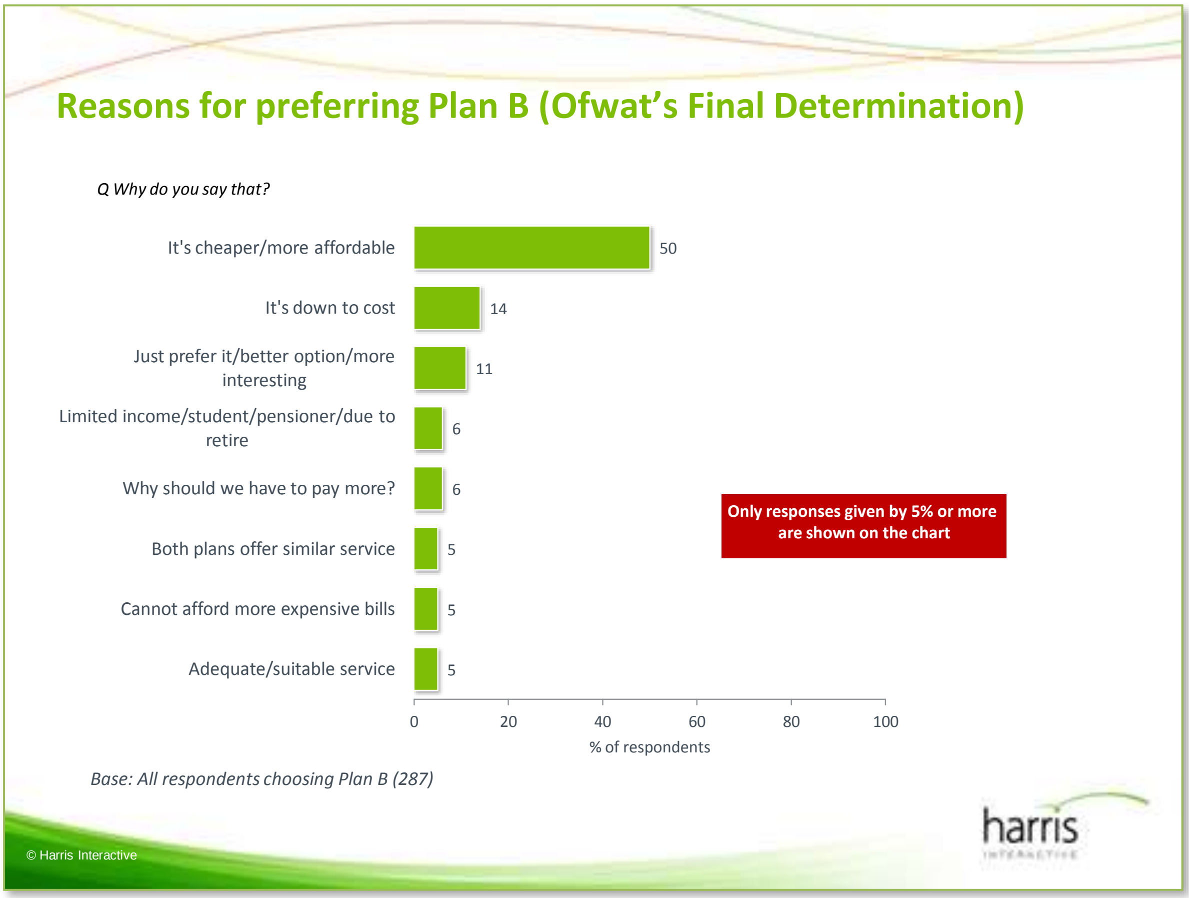
Chart 18 – Reasons for choosing Plan A (Bristol's Final Business Plan)



3.4.3.2 The majority who would choose Plan B do so primarily because it is so much cheaper than Plan A. Almost all the reasons given in the chart below are price-related to some degree. A small number (5%) feel that the service levels described are perfectly adequate and the same number cannot see much difference in service between the two plans.

[9] Although every effort was made to simplify the questionnaire, it was nevertheless quite complex. The responses to the questions about Plans A and B show that about 97% understood what they were being asked to do. However, there is some evidence that a very small number of respondents (3%) did not fully understand, as the reasons they give for choosing Plan A is that it is cheaper than the alternative.

Chart 19 – Reasons for choosing Plan B (Ofwat's Final Determination)



4. Conclusions

4.1 Setting the Scene

4.1.1 Media Activity

4.1.1.1 The findings of this survey would not appear to have been swayed by Bristol's recent media activity, nor would it seem to have had much effect on customers' views of the company.

- Only a relatively small proportion (13%) recall seeing anything in the three months prior to the research about service improvements or price changes that might be made by Bristol in the future
- Their take on the impact the media coverage has had on their perceptions of Bristol or the way they responded to the survey is mixed
- However, these customers tend to be more positive about Bristol, in terms of perceptions of value for money and acceptance of its FBP, than those who have not seen anything in the media about the company.

4.1.2 Water Supply Problems

4.1.2.1 Although most customers have experienced a problem with their water service since being a Bristol customer, the extent and seriousness of the problems appears limited. These findings could explain why customers do not see the need for the extra investment that Bristol is proposing.

- Over two-thirds have either not been affected by any issues in relation to their water supply (42%) or have only suffered one problem (27%)
- Very few (only 3%) have had prolonged loss of supply
- Around a fifth have been affected by loss of water for a few hours (21%), low water pressure (21%) and poor quality drinking water (19%) and around 1 in 7 have experienced a hosepipe ban (16%)[10] or disruption due to a leak near their home or work place (14%)

4.1.3 Importance of, and Satisfaction with, Water Services

4.1.3.1 All the four aspects of water service examined in this survey (maintaining the network of water supply pipes, managing the network to reduce disruption,

[10] Bristol have not imposed a hosepipe ban since 1992, however, customers may have assumed that one applied in 2006 as most water companies in southern England imposed water restrictions to combat drought

managing water usage and safety of tap water) are extremely/very important to the vast majority of customers (over four-fifths)

- Quality of tap water tops the list (90%), closely followed by managing water usage (86%), maintaining the network of supply pipes (85%) and managing the network to reduce disruption (81%)

4.1.3.1 Satisfaction with the current levels of service is high, with all four of the above services being rated four out of five or more. This may explain why customers see little or no need for the more costly investment plans proposed by Bristol.

4.1.4 Value for Money

4.1.4.1 Half of Bristol customers feel that their combined water and sewerage bills represent good value for money. Customers' perceptions of current value for money have an impact on the way they respond to Bristol's future plans. Those with positive perceptions of value for money are more likely to accept higher charges.

- Bristol scores 3.4 out of 5 (which can be interpreted as an average score) on value for money for the combined water and sewerage bill
- This is more than twice the number who hold the opposite point of – less than a quarter of respondents consider their combined water and sewerage bills to represent poor value for money
- Customers consider the water element of their bill better value for money (3.5) than the sewerage services (3.2)

4.2 Acceptability of Bristol's FBP and Ofwat's FD

4.2.1 The service levels proposed in each plan were equally acceptable to customers, which suggests that customers do not see the benefit of the additional investment priorities proposed by Bristol.

- 70% feel that the service levels in Bristol's FBP are acceptable (very or quite), compared to 71% for the Ofwat FD and only 7% and 6% held the opposite view for each plan.

4.2.2 However, the picture changes markedly when the associated price increases come into play and Bristol's plan becomes far less acceptable to customers.

- Only 19% accept the price increase associated with Bristol's FBP whilst 61% do not (a net 42% unacceptable rating)
- Whereas more accept Ofwat's price increases than do not (49% versus 31%), giving a net 18% approval rating

4.2.3 When given a straight choice between the two plans, the Ofwat plan is clearly preferred, primarily for cost reasons, which reinforces the view that customers are not prepared to pay for service proposals which they do not feel are necessary.

- Almost two-thirds (64%) choose the Ofwat plan as opposed to the Bristol plan (14%), with over a fifth (22%) undecided
- The vast majority of reasons given for choosing the Ofwat plan are related to cost and affordability

4.2.4 Further evidence that customers are more interested in keeping price increases to a minimum, rather than paying for enhanced services, is shown by their reaction to price differences for two of the individual service areas.

- For **managing water usage**, over half (51%) find Ofwat's proposed service level and increase of £9 acceptable, compared to less than one third (31%) being accepting of a £17 increase proposed by Bristol for making more water available within a shorter time period
- For **managing the network to reduce disruption,** acceptability levels are very similar for both plans and this may be because price differentials are small (£3 for Ofwat's plan to reduce disruption for 185,000 people compared to £6 for Bristol's plan to do this for 440,000)

4.3 Affordability of Bristol's FBP and Ofwat's FD

4.3.1 The affordability of Ofwat's FD is similar to the affordability of current bills, whereas Bristol's FBP has many more customers saying they cannot afford it than can.

- Just over a quarter state that they cannot afford their current bills, 42% claim that they are affordable to them personally and just over a quarter (28%) neither agree nor disagree
- Half (50%) consider Bristol's FBP (Plan A) to be unaffordable, and just over a quarter (27%) say it would be affordable, with the rest being undecided. This gives a net minus 23% affordability
- Ofwat's FD (Plan B) is more affordable, with just under a half (46%) feeling that they could afford it, about a quarter (26%) saying they could not and the rest being undecided. This gives a net affordability rating of plus 20%

5. Appendices

5.1 Propensity Weighting

Producing representative results from a panel

5.1.1 The brief specified the need to add face-to-face interviews to the online sample to also capture the views of those who are off-line. This was a valuable addition to the sample and at Harris Interactive we have a method of ensuring the results from our online panel are representative and can be combined with other data collection methods and used to represent the views of customers of Bristol as a whole.

5.1.2 Because not all adults are online and because those who are online must choose whether to join the panel, we recognise that the Harris Poll Online panel is not a random sample of all adults. To minimise potential demographic and attitudinal biases from the self-selected nature of the panel, Harris Interactive has developed innovative weighting techniques to ensure that results are projectable to the entire general population or subgroups of it. These techniques were employed in this research and are referred to as **Propensity Score Adjustment** and are implemented as follows:

- Respondents to the online survey were asked a battery of attitudinal/ behavioural and demographic questions. The former questions were developed to measure attitudes and behaviours that are correlated with the decisions to go online, join an online panel and respond to an online survey. These include attitudes toward sharing and using information and social engagement/participation. The demographic questions are those often used to weight data to remove the effects of differential response rates and include age, gender, education, race, region, and household income.

- Respondents to a survey in a mode that also reaches those who are offline are asked the same battery of attitudinal/ behavioural and demographic questions. For adults age 18+, Harris Interactive collects such parallel data via a bimonthly telephone study so that we can propensity score and weight our clients' data.

- The data from the two modes are merged and a statistical model is established to predict whether a respondent "looks like" the type of respondent who would be more likely to answer face to face versus online. Basically, the model segments all respondents into one of five groups anchored on one end by respondents who demographically and attitudinally look like the type who would be likely to answer an online survey and anchored at the other end by respondents who demographically and attitudinally look like the type who would be more likely to answer a survey by phone. The segmentation group, based on the probability of answering by one mode versus another, is called a propensity score.

- Once classification into segments was complete, the online respondents were weighted (using standard weighting techniques) to match population targets for age, gender, region, race, education, and household income and to match targets from statistical theory for the propensity score. If quotas are used within the survey, quota groups are also weighted to put them into their correct proportion relative to the population.

5.1.3 It is no surprise that certain kinds of people have a greater or lesser likelihood to be online and therefore to reply to our surveys. Some of these online respondents actually have characteristics that are very similar to people who do not use the internet and we use these people as a proxy to help us compensate for the non-online population. Including the propensity score as an additional weighting variable allows Harris Interactive to minimise potential biases due to self-selection into the online population and into our online panel and ensures that results are representative and projectable.

5.2 Questionnaire

Serial No.	**Interviewer**	**Quality Control**	**Interview length**		

Bristol Water Final Determination
PR09 Price Review
(J7831)

Name (Mr/Mrs/Miss/Ms):...
....

Address: ....

....

Postcode: ....

Tel No. ....

Classification Questions

Male	☐ 01
Female	☐ 02

Urban	☐ 01
Rural	☐ 02

INTERVIEWER
"I CONFIRM THAT THIS INTERVIEW HAS BEEN COMPLETED IN ACCORDANCE WITH MY BRIEFING INSTRUCTIONS AND THE MRS CODE OF CONDUCT"

Signed ______________________________

Date ______________________________

Print ______________________________ Int. No _______________

Introduction & Screening

Good morning/afternoon.

My name is ……… from Harris Interactive, a market research consultancy. We are currently conducting some research on behalf of the Consumer Council for Water to help inform decisions that are being made in relation to water bill charges in your area.

The aim of the research is to ensure that customer views are represented and that we take into account the issues that are prioritised in your area by customers such as yourself.

The interview only takes 15 minutes to complete and your help with our work will be much appreciated.

IF NECESSARY - REASSURE RESPONDENT THAT THE INTERVIEW IS CONFIDENTIAL AND THAT WE ARE NOT SELLING ANYTHING

Base: All respondents

S1 Would you be willing to answer some questions?

Yes	☐ 01	**CONTINUE**
No	☐ 02	**THANK & CLOSE**

Base: All respondents

S2 Can I just check – as far as you know, is your home connected to the mains water supply?

SINGLE CODE ONLY

Yes	☐ 01	**CONTINUE**
No	☐ 02	**THANK & CLOSE**
Don’t know	☐ 03	

Base: All respondents

S3 Which of the following types of bill payer best describes you?

SINGLE CODE ONLY

SHOWCARD A

Sole bill payer	☐	01	
Jointly responsible for household finances along with my Spouse or partner	☐	02	
Contributor to shared household expenses (e.g. house/flatmate, parents)	☐	03	**CONTINUE**
Payment through private rent	☐	04	
Payment through Council rent/social housing	☐	05	
Other (please specify_____________________)	☐	06	
I am not a bill payer	☐	07	**THANK & CLOSE**

Base: All respondents

S4 Which water company provides your water supply?

SINGLE CODE ONLY

Bristol Water	☐	01	**CONTINUE**
Other supplier	☐	02	**THANK & CLOSE**
Don't know	☐	03	**CHECK POSTCODE**

THANK & CLOSE IF NOT BRISTOL WATER (i.e. IF NOT CODE 1)

IF RESPONDENT DOESN'T KNOW (CODE 3) ASK FOR POSTCODE TO CONFIRM IF THEY LIVE IN BRISTOL WATER REGION (SEE REGION MAP)

Base: All respondents

S5 And which company provides your sewerage services?

SINGLE CODE ONLY

Wessex	☐	01	
Severn Trent	☐	02	**CONTINUE**
Thames Water	☐	03	
Other	☐	04	**THANK & CLOSE**
I have a septic tank	☐	05	**CONTINUE**
Don't know	☐	06	**THANK & CLOSE**

THANK & CLOSE IF NOT WESSEX, SEVERN TRENT OR THAMES WATER OR DO NOT A SEPTIC TANK (i.e. IF NOT CODES 1-3 OR 5)

Setting the Scene

Base: All respondents

Q1 Which of the following best describes how you would rate your current water and sewerage services in terms of ***Value for Money***?

SINGLE CODE ONLY

SHOWCARD B

Very good value for money	☐ 01
Fairly good value for money	☐ 02
Neither poor nor good value for money	☐ 03
Fairly poor value for money	☐ 04
Very poor value for money	☐ 05
Don't know / can't say	☐ 06

Base: All respondents stating a value for money (Q1 codes 1-5)

Q2 Why do you say that?

PROBE FULLY

Base: All respondents

Q3 Water companies are responsible for providing safe, reliable, and clean drinking water, whilst managing the effect of their activities on the environment.

Currently, the average bill in this area for **water supply** is **£157** per year.

Which of the following best describes how you would rate the **water service** you receive in terms of ***Value for Money***?

SINGLE CODE ONLY

SHOWCARD B

Very good value for money	☐ 01
Fairly good value for money	☐ 02
Neither poor nor good value for money	☐ 03
Fairly poor value for money	☐ 04

Very poor value for money	☐	05
Don't know / can't say	☐	06

Base: All respondents who have sewerage supplier (S5 codes 1-3)

Q4 Companies which provide sewerage services are responsible for removing and treating sewage and managing the effects of their activities on the environment. They work with a range of other agencies to deal with flooding from heavy rains and sewers.

Currently, the average bill in your area for **sewerage services** is **£________**per year.

If Wessex (S5 code 1) average bill is £210
If Severn Trent (S5 code 2) average bill is £152
If Thames (S5 code 3) average bill is £121

Which of the following best describes how you would rate the **sewerage services** you receive in terms of ***Value for Money***?

SINGLE CODE ONLY

SHOWCARD B

Very good value for money	☐	01
Fairly good value for money	☐	02
Neither poor nor good value for money	☐	03
Fairly poor value for money	☐	04
Very poor value for money	☐	05
Don't know / can't say	☐	06

Base: All respondents who have sewerage supplier (S5 codes 1-3)

Q5 Thinking about your **combined water and sewerage** bills of **£________**per year, to what extent do you agree or disagree that this is **affordable** to you personally?

If Wessex (S5 code 1) average bill is £367
If Severn Trent (S5 code 2) average bill is £309
If Thames (S5 code 3) average bill is £278

SINGLE CODE ONLY

SHOWCARD C

Strongly agree that I can afford this	☐	01
Tend to agree that I can afford this	☐	02

Neither agree nor disagree that I can afford this	☐ 03
Tend to disagree that I can afford this	☐ 04
Strongly disagree that I can afford this	☐ 05
Don’t know / can’t say	☐ 06

Service Levels

INTERVIEWER SAY:

We would now like to ask you a number of questions about the various services provided to customers by Bristol Water.

Base: All respondents

Q6 First of all, have you or your household ever been affected by any of the following issues in relation to your water supply, whilst you have been a customer of Bristol Water?

MULTICODE

SHOWCARD D

Poor quality of tap water	☐ 01
A loss of water supply to your home for a few hours	☐ 02
Continuous loss of water supply to your home for a few days	☐ 03
Continuous loss of water supply to your home for a week or more	☐ 04
Low water pressure	☐ 05
A hosepipe ban	☐ 06
A leak from your water supply pipe	☐ 07
Disruption from a leak near where you live or work	☐ 08
Other (**please specify**____________________)	☐ 09

INTERVIEWER: ROTATE ORDER OF NEXT SECTIONS SHOWN

1. **Maintaining the network of water supply pipes (Q7 – Q9)**
2. **Managing the network to reduce disruption (Q10 – Q15)**
3. **Managing water usage (Q16 – Q19)**
4. **Safety of tap water (Q20 – Q21)**

1. Service Levels – Maintaining the network of water supply pipes

Base: All respondents

Q7 Every water company has a network of water supply pipes which they look after via routine and regular maintenance to provide a continuous supply of water to their customers.

Thinking about this, how important would you say that the **maintenance of the water supply network** is to you?

SINGLE CODE ONLY

SHOWCARD E

Extremely important	☐	01
Very important	☐	02
Quite important	☐	03
Neither important, nor unimportant	☐	04
Not important	☐	05
Don't know / can't say	☐	06

Base: All respondents

Q8 And how satisfied are you with the current service from your water supplier in terms of how they **maintain the network of water supply pipes**?

SINGLE CODE ONLY

SHOWCARD F

Very satisfied	☐	01
Fairly satisfied	☐	02
Neither satisfied nor dissatisfied	☐	03
Fairly dissatisfied	☐	04
Very dissatisfied	☐	05
Don't know / can't say	☐	06

Base: All respondents

Q9 Water companies can maintain the water supply network in different ways, and costs depend on how they decide to do things.

There are two views as to how Bristol Water should approach its **routine** maintenance of the water supply network. One is that the network has not had enough investment in the past, and now more money needs to be spent to keep the service as it is; the other view is that it is possible to spend less money and maintain the service level as it is up until 2015 by working more efficiently and in a different way in the future.

So, for Bristol Water to maintain the network of supply pipes and maintain a continuous water supply until 2015, would you expect in principle to ...

SINGLE CODE ONLY

Pay more annually for your water services	☐	01
Pay the same annually for your water services	☐	02
Pay less annually for your water services	☐	03

2. Service Levels – Managing the network to reduce disruption

Base: All respondents

Q10 Water companies manage and protect their water supply network from the effects of extreme events such as floods or drought. This is so that in the event of extreme weather, there is less chance of people losing their water supply for long periods of time such as a week or more.

How important to you personally would you say **managing and protecting the network of water supply pipes to reduce the chance of water supplies being disrupted for 7 days or more** is?

SINGLE CODE ONLY

SHOWCARD E

Extremely important	☐	01
Very important	☐	02
Quite important	☐	03
Neither important, nor unimportant	☐	04
Not important	☐	05
Don't know / can't say	☐	06

Base: All respondents

Q11 And how satisfied are you with the current service provided by your water supplier for **managing and protecting the network** to reduce the chance of disruption?

SINGLE CODE ONLY

SHOWCARD F

Very satisfied	☐	01
Fairly satisfied	☐	02
Neither satisfied nor dissatisfied	☐	03
Fairly dissatisfied	☐	04
Very dissatisfied	☐	05
Don't know / can't say	☐	06

Base: All respondents

Q12 In terms of **managing and protecting the supply network** from events such as extreme weather, there are two different service levels which could be in place by 2015, each with a different price per customer.

The first level would mean that by 2015, around 4 in 10 people (440,000 in total) would be less likely to experience a lengthy disruption to their water supplies because of extreme weather. This would add an extra £6 a year to the average water bill

Bearing in mind that other household bills may go up or down in future, how acceptable do you find this?

SINGLE CODE ONLY

SHOWCARD G

Very acceptable	☐	01
Quite acceptable	☐	02
Neither acceptable, nor unacceptable	☐	03
Quite unacceptable	☐	04
Very unacceptable	☐	05
Don’t know / can’t say	☐	06

Base: All respondents

Q13 The second level would mean that, by 2015, around 1 in 7 people (185,000 people) will be less likely to experience an extended disruption of water supplies because of extreme weather. This would add an extra **£3** a year to the average water bill.

Again, bearing in mind that other household bills may go up or down in future, how acceptable do you find this?

SINGLE CODE ONLY

SHOWCARD G

Very acceptable	☐	01
Quite acceptable	☐	02
Neither acceptable, nor unacceptable	☐	03
Quite unacceptable	☐	04
Very unacceptable	☐	05
Don’t know / can’t say	☐	06

3. Service Levels – Managing water usage

Base: All respondents

Q14 Water companies **ensure there is enough water to go around for everyone**.

To do this they manage water usage, find and fix leaks and plan ahead to make sure there will be enough water capacity to meet peoples' needs in the future.

How important would you say this is?

SINGLE CODE ONLY

SHOWCARD E

Extremely important	☐	01
Very important	☐	02
Quite important	☐	03
Neither important, nor unimportant	☐	04
Not important	☐	05
Don't know / can't say	☐	06

Base: All respondents

Q15 And how satisfied are you with the current service provided by your water supplier for **ensuring there is enough water for everyone?**

SINGLE CODE ONLY

SHOWCARD F

Very satisfied	☐	01
Fairly satisfied	☐	02
Neither satisfied nor dissatisfied	☐	03
Fairly dissatisfied	☐	04
Very dissatisfied	☐	05
Don't know / can't say	☐	06

Base: All respondents

Q16 In terms of ensuring there is enough water to go around, there are two different views as to how much water is needed to meet future population growth and by when. Each view, and the associated service level, has a different price per customer. One will make more water available by 2015 and the other by 2020.

The first service level makes more water available by 2020 through:

- Reducing leaks by 10%
- Fitting more water meters
- Planning started for a new reservoir
- Reducing the risk of a hosepipe ban from one in 15 to no more than once in 20 years
- Advising customers on how to use water wisely

Bearing in mind that other household bills may go up or down in future, how acceptable would you consider an increase in average water bills of **£9 per year** for the above extra activities?

SINGLE CODE ONLY

SHOWCARD G

Very acceptable	☐ 01
Quite acceptable	☐ 02
Neither acceptable, nor unacceptable	☐ 03
Quite unacceptable	☐ 04
Very unacceptable	☐ 05
Don't know / can't say	☐ 06

Base: All respondents

Q17 The second service level makes more water available by 2015 through all of the above activities plus:

- Fitting new 'smart' water meters to help customers monitor their water usage and use water wisely
- Brining the water source at Honeyhurst back in use to increase the amount of water available

Bearing in mind that other household bills may go up or down in future, how acceptable would you consider an increase in average water bills of **£17 per year** for all the activities above?

SINGLE CODE ONLY

SHOWCARD G

Very acceptable	☐	01
Quite acceptable	☐	02
Neither acceptable, nor unacceptable	☐	03
Quite unacceptable	☐	04
Very unacceptable	☐	05
Don't know / can't say	☐	06

4. Service Levels – Safety of tap water

Base: All respondents

Q18 Water companies ensure that **tap water is safe to drink**, and that it looks and tastes acceptable.

How important would you say this is to you?

SINGLE CODE ONLY

SHOWCARD E

Extremely important	☐ 01
Very important	☐ 02
Quite important	☐ 03
Neither important, nor unimportant	☐ 04
Not important	☐ 05
Don't know / can't say	☐ 06

Base: All respondents

Q19 How satisfied are you with the current service provided by Bristol Water in **ensuring the safety, taste and appearance of your tap water**?

SINGLE CODE ONLY

SHOWCARD F

Very satisfied	☐ 01
Fairly satisfied	☐ 02
Neither satisfied nor dissatisfied	☐ 03
Fairly dissatisfied	☐ 04
Very dissatisfied	☐ 05
Don't know / can't say	☐ 06

Overall Service Acceptability

SHOW PLAN A AND PLAN B SHOWCARDS
RANDOMISE ORDER SHOWN – PLAN A (Q20-22) & PLAN B (Q23-Q25)

Base: All respondents

Q20 Please now look at a summary of different service levels that could be provided by Bristol Water by 2015.

SHOWCARD H

Plan A	
Service area	**Service level provided by 2015**
Maintaining the network of water supply pipes	Manage and repair water pipes, treatment works and equipment to maintain current supplies and quality of drinking water
Ensure the safety of tap water	By using a variety of treatment techniques aim for all samples to meet quality standards for tap water. Currently 99.98% meet the standards.
Ensure there is enough water for everyone by managing water usage, leakage and planning for water in the future	Provide a reliable water supply to existing and new customers, as it is now by: - Reducing leaks by 10% - Fitting more water meters - Helping people use water wisely - Planning a new reservoir at Cheddar - Reducing the risk of a hosepipe ban to no more than once in 20 years - Bringing the water source at Honeyhurst back into use - Trying out smart meters
Managing and protecting the network of water supply pipes to reduce the chances of disruption	The chance of losing water supply for a week or more will be reduced for 4 out of 10 people

First of all, how acceptable would you find it if this was the service that was provided to you?

SINGLE CODE ONLY

Very acceptable	☐ 01
Quite acceptable	☐ 02
Neither acceptable nor acceptable	☐ 03

Not very acceptable	☐	04
Not at all acceptable	☐	05
Don’t know / can’t say	☐	06

<u>Base: All respondents</u>

Q21 The cost of providing the service levels shown here would mean a **£45 increase** in the average water bill by 2015, taking it **from £157 to £202** (excluding inflation).

SHOWCARD I

Plan A		
Service area	**Service level provided by 2015**	**Change in bill by 2015**
Maintaining the network of water supply pipes	Manage and repair water pipes, treatment works and equipment to maintain current supplies and quality of drinking water	£26
Ensure the safety of tap water	By using a variety of treatment techniques aim for all samples to meet quality standards for tap water. Currently 99.98% meet the standards.	
Ensure there is enough water for everyone by managing water usage, leakage and planning for water in the future	Provide a reliable water supply to existing and new customers, as it is now, by: - Reducing leaks by 10% - Fitting more water meters - Helping people use water wisely - Planning a new reservoir at Cheddar - Reducing the risk of a hosepipe ban to no more than once in 20 years - Bringing the water source at Honeyhurst back into use - Trying out smart meters	£17
Managing and protecting the network of water supply pipes to reduce the chances of disruption	The chance of losing water supply for a week or more will be reduced for 4 out of 10 people	£6
Overall assumption that costs will fall in the future. For example, due to more efficient means of working		-£4

Given that other household bills may go up or down in the future, and the average sewerage bill in your area would be **£________**per year making your combined water and sewerage bill **£________**per year, how acceptable would you find this **£45 increase in your water bill**?

If Wessex (S5 code 1) average sewerage bill is £200 and combined bill is £402
If Severn Trent (S5 code 2) average sewerage bill is £140 and combined bill is £342
If Thames (S5 code 3) average sewerage bill is £133 and combined bill is £335
SINGLE CODE ONLY

Very acceptable	☐	01
Quite acceptable	☐	02
Neither acceptable nor acceptable	☐	03
Not very acceptable	☐	04
Not at all acceptable	☐	05
Don’t know / can’t say	☐	06

Base: All respondents

Q22 And to what extent do you agree or disagree that this cost would be **affordable** to you personally?
SINGLE CODE ONLY
SHOWCARD J

Strongly agree that I could afford this	☐	01
Tend to agree that I could afford this	☐	02
Neither agree nor disagree that I could afford this	☐	03
Tend to disagree that I could afford this	☐	04
Strongly disagree that I could afford this	☐	05
Don’t know / can’t say	☐	06

Base: All respondents

Q23 Please now look at a second summary of service levels that could be provided by Bristol Water.

SHOWCARD K

Plan B	
Service area	**Service level provided by 2015**
Maintaining the network of water supply pipes	Manage and repair water pipes, treatment works and equipment to maintain current supplies and quality of drinking water
Ensure the safety of tap water	By using a variety of treatment techniques aim for all samples to meet quality standards for tap water. Currently 99.98% meet the standards.
Ensure there is enough water for everyone by managing water usage, leakage and planning for water in the future	Provide a reliable water supply to existing and new customers, as it is now, by: - Reducing leaks by 10% - Fitting more water meters - Helping people use water wisely - Planning a new reservoir at Cheddar - Reducing the risk of a hosepipe ban to no more than once in 20 years
Managing and protecting the network of water supply pipes to reduce the chances of disruption	The chance of losing water supply for a week or more will be reduced for 1 out of 7 people.

How acceptable would you find it if this was the service that was provided to you?

SINGLE CODE ONLY

Very acceptable	☐ 01
Quite acceptable	☐ 02
Neither acceptable nor acceptable	☐ 03
Not very acceptable	☐ 04
Not at all acceptable	☐ 05
Don’t know / can’t say	☐ 06

<u>Base: All respondents</u>

Q24 The cost of providing the service levels shown here would mean an **£11 increase** to the average water bill by 2015 taking it **from £157 to £168** (excluding inflation)

SHOWCARD L

Plan B		
Service area	**Service level provided by 2015**	**Change in bill by 2015**
Maintaining the network of water supply pipes	Manage and repair water pipes, treatment works and equipment to maintain current supplies and quality of drinking water	£1
Ensure the safety of tap water	By using a variety of treatment techniques aim for all samples to meet quality standards for tap water. Currently 99.98% meet the standards.	
Ensure there is enough water for everyone by managing water usage, leakage and planning for water in the future	Provide a reliable water supply to existing and new customers as it is now by: - Reducing leaks by 10% - Fitting more water meters - Helping people use water wisely - Planning a new reservoir at Cheddar - The risk of a hosepipe ban no more than once in 20 years	£9
Managing and protecting the network of water supply pipes to reduce the chances of disruption	The chance of losing water supply for a week or more will be reduced for 1 out of 7 people.	£3
Overall assumption that costs will fall in the future. For example, due to more efficient means of working		-£2

Given that other household bills may go up or down in the future, and the average sewerage bill in your area would be **£________**per year making your combined water and sewerage bill **£________**per year, how acceptable would you find this **£11 increase in your water bill**?

If Wessex (S5 code 1) average sewerage bill is £200 and combined bill is £368
If Severn Trent (S5 code 2) average sewerage bill is £140 and combined bill is £308
If Thames (S5 code 3) average sewerage bill is £133 and combined bill is £301

SINGLE CODE ONLY

Very acceptable	☐ 01
Quite acceptable	☐ 02
Neither acceptable nor acceptable	☐ 03
Not very acceptable	☐ 04
Not at all acceptable	☐ 05
Don't know / can't say	☐ 06

Base: All respondents

Q25 And to what extent do you agree or disagree that this cost would be **affordable** to you personally?

SINGLE CODE ONLY

SHOWCARD J

Strongly agree that I could afford this	☐ 01
Tend to agree that I could afford this	☐ 02
Neither agree nor disagree that I could afford this	☐ 03
Tend to disagree that I could afford this	☐ 04
Strongly disagree that I could afford this	☐ 05
Don't know / can't say	☐ 06

Base: All respondents

Q26 Looking at these 2 summaries of service levels, which of these would you be most likely to chose given the choice?

SINGLE CODE ONLY

Plan A	☐ 01
Plan B	☐ 02
Don't know / can't say	☐ 03

Base: All respondents selecting Plan A or B (Q26 codes 1 or 2)

Q27 Why do you say that?

PROBE FULLY

____

____

____

Media Activity

Base: All respondents

Q28 Have you seen or heard anything in the media (newspapers, television, radio or internet) within the last 3 months about service improvements or price changes that might be made by Bristol Water in the future?

MULTICODE

Not seen or heard anything	☐ 01
Information about service improvements	☐ 02
Information about price changes	☐ 03
Information about service improvements **and** price changes	☐ 04
Something else about/from Bristol Water	☐ 05
Don't know / can't say	☐ 06

Base: All respondents who have seen media activity (Q28 codes 2-5)

Q29 What have you seen?

PROBE FULLY FOR TYPE OF INFORMATION SEEN E.G. NEWSPAPER, RADIO, TV ETC AND ALSO FOR CONTENT OF INFORMATION E.G. POSITIVE NEWS, NEGATIVE PUBLICITY ETC

Base: All respondents who have seen media activity (Q28 codes 2-5)

Q30 And thinking about the information that you have seen, has it had a positive or negative effect on the way in which you view Bristol Water? **SINGLE CODE ONLY**

Positive impact	☐ 01
Negative impact	☐ 02
No impact at all	☐ 03
Don't know / can't say	☐ 04

Base: All respondents who have seen media activity (Q28 codes 2-5)

Q31 Do you think the information you have seen has had a positive or negative effect on the way in which you have answered this survey?

SINGLE CODE ONLY

Positive impact	☐ 01
Negative impact	☐ 02
No impact at all	☐ 03
Don't know / can't say	☐ 04

Base: All respondents who have seen media activity (Q28 codes 2-5)

Q32 Having seen the information from or about Bristol Water, did you seek further information about the issues?

MULTICODE

No further information sought	☐ 01
Visited Bristol Water website	☐ 02
Visited Ofwat website	☐ 03
Visited other website	☐ 04
Contacted Bristol Water	☐ 05
Contacted other organisation	☐ 06
Other action taken (please specify)	☐ 07

Classification Questions

INTERVIEWER SAY:
Finally, I'd like to ask you some questions to help us analyse the results of this survey. To confirm again, all of your answers will be kept strictly confidential and not linked to your name or address.

Base: All respondents

Q33 First of all, are you currently charged for water via a water meter installed at your home?

SINGLE CODE ONLY

Yes	☐ 01
No	☐ 02
Don't know / Can't say	☐ 03

Base: All respondents

Q34 Which of the following age categories do you fall into?

SINGLE CODE ONLY

SHOWCARD

18-24	☐ 01
25-29	☐ 02
30-39	☐ 03
40-49	☐ 04
50-59	☐ 05
60+	☐ 06
Refused	☐ 07

Base: All respondents

Q35 How many adults, including yourself, are there in your household? By adults we mean anyone aged 16 or over?

SINGLE CODE ONLY

One	☐ 01
Two	☐ 02
Three	☐ 03
Four	☐ 04
Five or more	☐ 05

Refused	☐	07

Base: All respondents

Q36 Which of the following best describes the occupational level of your household's primary income earner?

SINGLE CODE ONLY

SHOWCARD

Retired and collecting pension with no other earnings	☐	01
Retired and collecting pension with other earnings	☐	02
Manual or service worker with minimal formal education or training	☐	03
Semi-skilled manual or service worker	☐	04
Clerical worker	☐	05
Junior managerial, administrative, or professional position	☐	06
Supervisor in managerial, administrative, or professional position	☐	07
Intermediate managerial, administrative, or professional position	☐	08
Upper level managerial, administrative, or professional position	☐	09
State pensioner with no other earnings	☐	10
Skilled manual or service worker	☐	11
Other position	☐	12

Base: All respondents

Q37 What is the total annual income of your household? By personal income I mean your total income before tax and other deductions but **including any type of benefits**. Please tell me which of these bands best represents your income?

SINGLE CODE ONLY

SHOWCARD

Less than £10,000	☐	01
£10,000 - £19,999	☐	02
£20,000 - £29,999	☐	03
£30,000 - £39,999	☐	04
£40,000 - £49,999	☐	05

£50,000 - £59,999	☐ 06
£60,000 or more	☐ 07
Don't know / Refused	☐ 08

Thank you for your help. Can I just remind you that this interview is part of a market research survey being carried out by Harris Interactive. If you want to verify that we are a bona fide agency, I can give you the Freephone number of the Market Research Society to ring.

GIVE NUMBER IF REQUIRED (0500 396 999).

5.3 Sample profile

	Weighted Profile		Unweighted Profile	
	Number	%	Number	%
Male	214	49	190	43
Female	223	51	247	57
Total	**437**	**100**	**437**	**100**
Age 18 – 29	101	23	63	15
Age 30 – 49	144	33	172	39
Age 50+	192	44	202	46
Total	**437**	**100**	**437**	**100**
SEG - AB	80	18	93	21
SEG - C1 / C2	164	38	127	29
SEG - DE	105	24	130	30
Unclassified	87	20	87	20
Total	**437**	**100**	**437**	**100**