Prepared for:

CCW
The voice for water consumers
Y corff sy'n rhoi llais i ddefnyddwyr dŵr

PR19 draft determination research

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1. Foreword

It is vital that customers find the outcome of the 2019 price review (PR19) acceptable, to improve perceptions of fairness and value for money, and to help improve the legitimacy of the industry in customers' eyes.

PR19 saw water companies significantly increase the amount of research and customer engagement they carried out, helping to establish customers' priorities for investment and measuring how acceptable they found their company's plans.

However, each company used their own approach to surveys and discussions to carry out their research, limiting the amount of comparability between the results each company got. Companies handled the impact of inflation on bills, the potential impact of outcome delivery incentives (ODIs) and the presentation of information about service changes in different ways.

The draft determination stage of the price review process is an important milestone towards the setting of prices and services levels for customers over the next five years. Ofwat has delivered its verdict on companies' plans and customers are able to see what this is likely to mean for them.

CCW commissioned DJS Research to carry out research into the draft determinations for all companies using the same survey for each. We asked five hundred customers of each company how acceptable they found the determinations, for their views on the potential impact of ODIs and how affordable they thought their bills would be considering the impact of the draft determinations.

We give a higher weight to uninformed acceptability scores than informed because this is a better reflection of how the majority of customers will react to their bills following a price determination. The average customer does not receive very much information about the price review outcome, nor are they likely to scrutinise information unless they have a specific concern.

Overall, 88% of customers in England and Wales found the determinations acceptable when given basic details about the impact on bills (uninformed acceptability). There was little difference when we gave customers more information about the likely change to service levels between 2020 and 2025 (87% informed acceptability). Acceptability fell significantly by just over 10% when the potential impact of ODIs on their bills was shown to customers.

The high levels of acceptability seen in our research demonstrate that customers were generally happy with the price and service levels presented in the draft determinations. However, there were notable differences across different customer groups, with those on lower incomes finding the DD much less acceptable. It's important that companies understand what more can be done for those customers who don't find the DD acceptable and take action as they deliver the outcomes of the 2019 price review.

Dr Mike Keil, Head of Policy and Research, CCW.

2. Executive summary

2.0.1 CCW represents the interests of water and sewerage customers in England and Wales. CCW aims to put customers' views at the heart of the regulatory decisions which determine the bills that customers pay and the services they receive for the following five years, in this case from 2020 to 2025. To ensure this is the case, it is necessary to obtain clear evidence of customer views and priorities.

2.0.2 Every five years Ofwat, the water industry regulator, sets the price, investment and service package that water companies in England and Wales can charge their customers (the 'Price Review'). In April and July 2019, Ofwat announced its Draft Determinations (DDs) – its initial view – on water company proposals for price, investment and services from 2020 to 2025.

2.0.3 To ensure that customers' views are at the heart of the price review, CCW commissioned an industry-wide survey to understand how acceptable Ofwat's DDs are to customers. This uses a consistent methodology and questionnaire[1] for each company, and is the only cross-industry research to do so. This enables us to understand likely customer reaction to Ofwat's DDs, compare views in different parts of England and Wales, and identify any acceptability outliers.

2.0.4 A total of 10,842 interviews were conducted with household customers in England and Wales in order to establish the level of acceptability for each of Ofwat's DDs.

2.0.5 Interviews were conducted online, using panel providers, and face to face[2] to ensure coverage of 'offline' populations, and to 'top up' the number of interviews in water company areas where the incidence of eligible online panellists is low. Five hundred interviews were conducted with customers of each water company[3].

2.0.6 Final data were weighted to match each company's customer profile.

2.0.7 The questionnaire drew on CCW and industry experience of conducting acceptability research, and was based, in part, on the equivalent 2014 CCW survey.

2.0.8 This executive summary presents the key findings from the research.

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[1] Hafren Dyfrdwy customers were interviewed face to face only. Additionally, customers in Powys (who have both their water and sewerage supplied by Hafren Dyfrdwy) were interviewed as WaSC customers, while customers in Wrexham (who have their water supplied by Hafren Dyfrdwy and their sewerage supplied by Dŵr Cymru Welsh Water) were interviewed as WoC customers. In the main body of the report, Hafren Dyfrdwy customers in these two areas are reported on separately. A separate section with the full Hafren Dyfrdwy data set is included in section 11 of the report, with comparisons against other WaSC companies, to reflect the company's regulatory status

[2] Fieldwork was completed in two phases. The first, in May and June 2019, with 'fast track' companies (United Utilities, Severn Trent and South West Water. In addition, as part of the South West Water group, Bournemouth Water was also included), and the second in August and September 2019 with the remaining 'slow track' and 'significant scrutiny' companies

[3] There are three water companies where fewer than 500 interviews were achieved (Hartlepool Water (444), Cambridge Water (472) and Severn Trent (498)). At least 500 interviews were achieved for every other water company.

2.1 Key Findings

Research approach

This survey measured three core levels of customer acceptability of water companies' business plans and proposed bills for the period 2020-2025:

1.Uninformed acceptability of proposed bills (from 2019-20, at a year on year level and at a total change level) in order to best reflect the 'average' customer's awareness and understanding of water companies' service level commitments.
2. Informed acceptability - customers were then presented with a more detailed snapshot of their water (and sewerage) company's performance commitments alongside the same billing information to gather informed acceptability data.
3. Acceptability of the potential effect of Outcome Delivery Incentives (ODIs) on the minimum and maximum bill they might pay, preceded by an explanation of the rationale for ODIs and a note that bills are more likely to end up towards the middle of the potential bill range than at the upper or lower end.

2.1.1 Uninformed acceptability

- 87% of customers across England and Wales found the proposed combined bill from 2019 (current bill) to 2020 (new bill) acceptable; customers in Wales are significantly more likely to find this acceptable (90%) than customers in England (87%).
- Similarly, 87% found the proposed bill change for each year to 2025 to be acceptable, with no difference in outlook between customers in England (87%) and Wales (87%).
- Finally, 88% of customers in England and Wales find the proposed total bill change over five years acceptable; it is 88% in both England and Wales.

2.1.2 Informed acceptability

- Informed acceptability for water services proposals is 88% across England and Wales combined, and the same (88%) in England and in Wales separately.
- Across England and Wales combined, informed acceptability for sewerage service proposals is 86%, and it is also 86% in in England and Wales separately.
- Informed acceptability of combined services is 87% across England and Wales combined; 86% among customers in England, and 88% among customers in Wales.

2.1.3 Acceptability of ODI potential bill range

- Acceptability of ODIs is 76% among customers in England and Wales. Customers in England are significantly more likely to find the ODI potential bill range acceptable (76%) than customers in Wales (68%).

2.1.4 **Affordability**

- 66% of customers in England and Wales consider their **current bill** affordable, (66% in England compared to 67% in Wales).
- 77% of customers in England and Wales consider the **proposed bill**, before the potential impact of ODIs to be affordable (77% in England and 77% in Wales).

2.1.5 **Trends in acceptability**

- Uninformed and informed acceptability, and acceptability of ODIs increases in-line with household income; those with a household income of £75,000+ being significantly more likely to consider each aspect acceptable than those with a household income of up to £20,000.
- Similarly, when looking at Socio Economic Classification (SEC), customers in higher SEC bands are significantly more likely to consider the proposed changes (at the uninformed and informed levels and for ODIs) acceptable than those in the lower SEC bands;
- Additionally, those who report having difficulty paying their water bills on time are significantly less likely to find the proposed bills acceptable at any level, including the potential of ODIs.
- Customers who are on their company's Priority Service Register (PSR) are less likely to find the proposals acceptable at the uninformed and informed levels than those who are not on PSR, however, there is no significant difference in acceptability of ODIs.

3. Introduction

3.0.1 Every five years, Ofwat (the economic regulator for the water and sewerage industry) sets price limits that enable water and sewerage companies to finance the delivery of services to customers, in line with relevant standards and requirements. Ofwat's proposed price and service 'packages' for customers were initially issued in April (for fast-track companies) and July (for slow-track and significant scrutiny companies) in July 2019 before announcing its Final Determinations (price limits) in December 2019. The Final Determinations cover all water and sewerage companies in England and Wales for the five-year period from 2020 to 2025.

3.0.2 CCW - set up in 2005 to represent the interests of business and household water and sewerage consumers in England and Wales – wanted to understand how acceptable and affordable each company's business plan is to customers in order to provide a voice for consumers across England and Wales.

3.0.3 The current price review process (PR19), provides Ofwat with the information they need in order to set the price limits for each company. The process requires companies to submit five-year business plans setting out how they will meet environmental and drinking water quality standards and deliver high quality customer service. Companies also have to demonstrate that they plan to deliver investment in the areas that customers value, and at a price they find acceptable.

3.1 Research aims

Overall the main objective of this piece of research is to gain a robust understanding of what household customers in England and Wales think about Ofwat's Draft Determinations (DDs) for each water company. In addition, the research is required to:

3.1.1 **Objectives in detail:**

- Gain an understanding of customers' views about the investment proposals of their water and/or sewerage company
- Identify to what degree DD investment proposals are considered affordable and acceptable to customers
- Identify how the potential impact of Outcome Delivery Incentives (ODIs) on bill levels affects the acceptability of DDs.

3.2 Approach

3.2.2 A quantitative approach was adopted, aiming for 500 surveys for each water company in England and Wales, with the majority of interviews conducted via an online survey.

3.2.3 A minimum of 50 interviews per company were done face to face. This was for two reasons:

- In order to capture the 'offline' population, i.e. those people who rarely or never use the internet
- To reach the target sample of 500 per company where the online panel population was not big enough to provide 450 online surveys for the company in question; the shortfall was made up with face-to-face surveys.

3.3 Fieldwork

3.3.1 The first step in the fieldwork process was to conduct face to face cognitive pilot interviews to understand – from the consumer perspective – any areas of the proposed questionnaire design and the service descriptions which were difficult to understand, lacking sufficient detail, or not 'optimal' when completing the questionnaire. These interviews were conducted in February 2019 with customers of Severn Trent, a water and sewerage company (WaSC) and South Staffordshire Water, a water only company (WoC), and were undertaken before Ofwat's initial DDs were published. The outcome of the pilot interviews was that, in the main, the questionnaire was understandable and relatable for customers, and only minor changes to the questionnaire structure were suggested.

3.3.2 Following the pilot stage, and after Ofwat's initial DDs were published, Phase 1 of the research took place in April and May 2019[4] with customers of Ofwat's 'fast track' companies[5].

3.3.3 Phase 2 was conducted with Slow Track and Significant Scrutiny companies in August and September 2019.

[4] Severn Trent Water – which formed part of the Phase 1 research – was re-surveyed in June 2019 in order to present updated Outcome Delivery Incentive data. This report only includes data from fieldwork completed in June 2019.

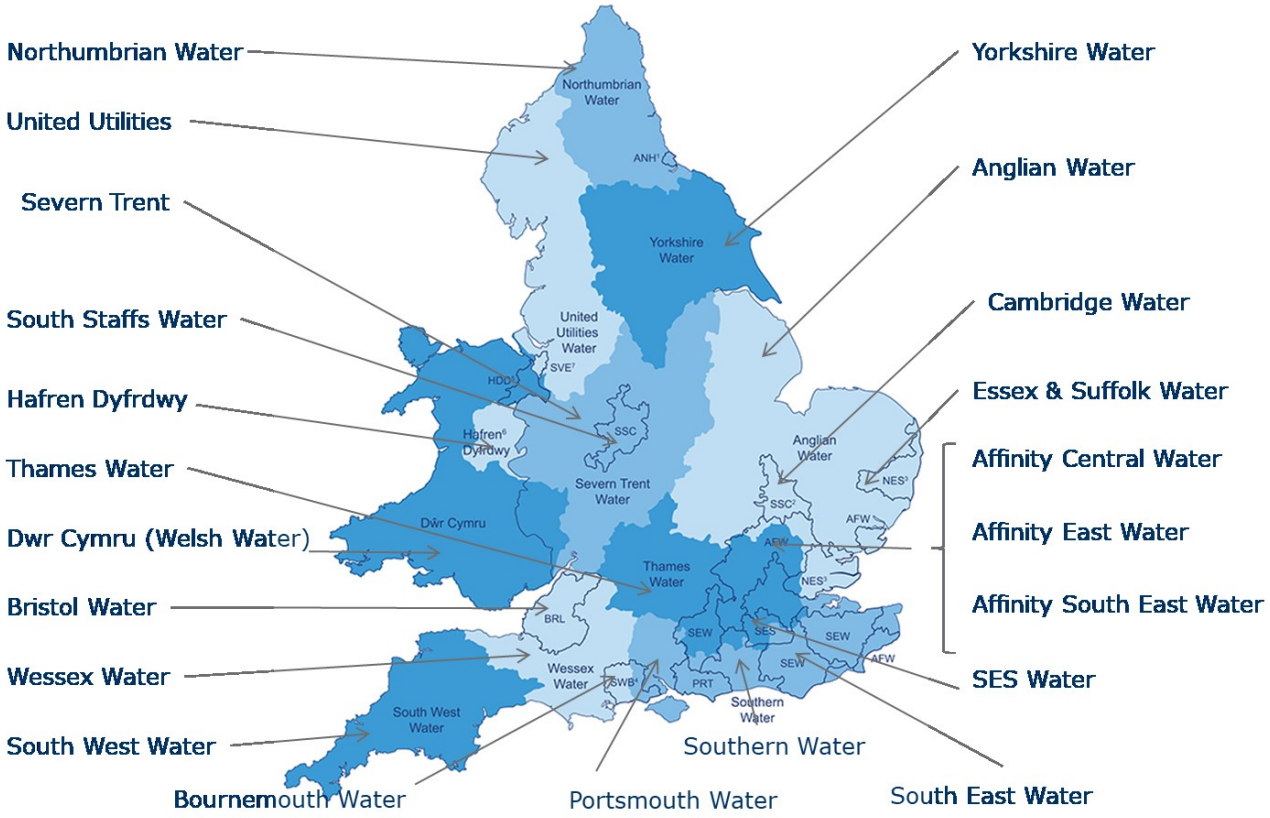
[5] Ofwat's initial Draft Determination responses resulted in three companies being granted 'fast track' status in April 2019. These companies – Severn Trent, United Utilities and South West Water were the companies tested in Phase 1. Alongside the 'fast track' companies, Bournemouth Water, as part of South West Water was also included, and as a WoC, Southern Water (which supplies Bournemouth Water customers with sewerage services) provisional sewerage bill figures and performance commitments were also shown.

3.3.4 A total of 10,842 interviews were completed across England and Wales across Phase 1 and Phase 2, comprising a minimum 500 interviews in each of the water company areas aside from Hartlepool Water (444 interviews), Cambridge Water (472 interviews) and Severn Trent (498 interviews).

3.3.5 Online interviews accounted for 74% of the total sample (8,074 interviews).

3.3.6 Face-to-face interviews accounted for 26% of the sample (2,768 interviews)[6].

Figure 1: Water companies surveyed



[6] In Hafren Dyfrdwy, interviewing was conducted via face-to-face interviews only. With the company split into two regions – Powys, where customers are served as part of a WaSC; and, Wrexham, where customers are served as part of a WoC – interviews were split with 200 customers interviewed in Powys and 300 interviewed in Wrexham. Data for Hafren Dyfrdwy is presented separately throughout this report, with a combined analysis presented in section 11.

3.4 Sampling

3.4.1 The online sample was sourced from several panel companies. The face-to-face interviews were conducted on-street and by going door to door to find qualifying respondents. Quotas were set on age, gender, and socio-economic classification (SEC) within the region that each water company was situated. Quotas were based on census data for each water company region (e.g. there were different quotas set to match the profile of customers in the Cambridge Water area vs. the profile of customers in the Northumbrian Water area) in order to achieve a representative sample in each water company area, in England, in Wales, and, in England and Wales combined. In 2014, DJS Research commissioned a face-to-face omnibus survey of 1,000 water bill-payers with a representative sample for England and Wales in order to identify the proportion of younger bill payers in England and Wales. The survey discovered that only 27% of 18-29-year olds were responsible for paying their water bill. As a result, the age band quotas were adjusted from the census data to reflect this finding.

3.4.2 SEC classifications used are:

1 - Higher managerial, administrative and professional occupations; lower managerial, administrative and professional occupations

2 - Intermediate occupations; small employers and own account workers

3 - Lower supervisory and technical occupations; semi-routine occupations; routine occupations

4 - Never worked and long-term unemployed

5 – Full-time students.[7]

3.4.3 For each water company, interviews were split on the basis of a minimum of 450 online interviews and a minimum of 50 face to face interviews where possible. However, in a number of regions where the availability of customers via online panel was lower than 450, additional face-to-face interviews were conducted to cover the shortfall.

3.4.4 Respondents were screened to ensure they were the person responsible for paying the water bill within their household; respondents with septic tanks were screened out because they do not pay for sewerage services.

3.4.5 Details of the interviews achieved per company are shown below:

[7] Due to the low base size of full-time students in each of the water company regions, this group have been rolled up with the level 4 (never worked / long-term unemployed) SEC group throughout this report

Table 1: Interviews achieved by age, gender, SEC, online and face to face for WaSCs

	Anglian Water %s	Dŵr Cymru (Welsh Water) %s	Northumbrian Water %s	Hafren Dyfrdwy (Powys) %s	Severn Trent %s	Southern Water %s	South West Water %s	Thames Water %s	United Utilities %s	Wessex Water %s	Yorkshire Water %s
Gender											
Male	48	46	49	46	53	49	49	47	51	42	47
Female	52	54	51	54	47	51	49	53	49	58	53
Age											
16-29	4	5	3	4	7	4	8	7	8	2	4
30-44	21	13	22	20	27	20	27	26	28	18	23
45-59	38	38	36	34	30	35	29	38	28	36	35
60-74	25	28	25	29	22	26	22	19	23	27	25
75+	13	15	15	13	14	16	12	11	13	17	13
SEC											
1	44	40	38	46	30	45	32	44	29	43	39
2	24	21	21	26	22	22	24	25	22	24	23
3	23	30	31	24	38	24	33	2Z	36	24	25
4/5	9	9	10	4	11	9	11	10	12	8	13
Total	**509**	**519**	**513**	**200**	**498**	**548**	**518**	**523**	**516**	**545**	**501**

Table 2: Interviews achieved by age, gender, SEC, online and face to face for WoCs

	Hafren Dyfrdwy (Wrexham) %s	Affinity %s	Bristol Water %s	Cambridge Water %s	Essex and Suffolk Water %s	Hartlepool Water %s	Portsmouth Water %s	Bournemouth Water %s	South East Water %s	South Staffordshire Water %s	SES Water %s
Gender											
Male	47	49	45	45	46	41	50	44	44	48	45
Female	53	51	55	54	54	59	50	55	56	51	55
Age											
16-29	3	3	5	6	2	1	2	8	3	7	4
30-44	19	15	30	30	23	14	18	24	19	24	16
45-59	34	39	21	22	35	41	24	24	34	29	37
60-74	29	30	38	29	28	30	44	28	31	34	30
75+	15	13	6	13	11	14	12	17	12	7	13
SEC											
1	45	46	52	50	46	35	46	33	50	39	52
2	18	22	26	28	24	19	24	26	19	25	24
3	26	25	18	16	23	32	25	33	23	28	18
4/5	11	8	5	6	7	14	6	7	8	8	6
Total	**300**	**511**	**537**	**472**	**542**	**444**	**529**	**545**	**529**	**542**	**525**

3.5 Weighting and data processing

3.5.1 Each water company was weighted in line with the adult (bill paying) population in that region in terms of gender, age and SEC.

3.5.2 The weighting necessary to align the sample demographics with the population varied by water company. In all water companies, the weighting efficiency was above 70%.

3.5.3 Weighting efficiency is a measure of the strength of the weights applied to the sample in order to match the sample demographics to the population demographics. Efficiency runs from 0% to 100%. Efficiency of 100% means that the sample matched the population exactly and no weighting was required. The higher the efficiency score, the closer the sample match to the population demographics. In Southern Water we have a weighting efficiency of 98% which means that only a very tiny weighting correction was needed to match the sample to the population in this region. In all water companies we have an efficiency score greater than 70% which is generally accepted as being within the bounds of good research practice[8]. The weighting in WaSCs was very slight (noted by the high efficiency score of 90% for WaSCs). The weighting across the WoCs has a slightly lower efficiency score of 82% but this is still a 'healthy' efficiency measure.

3.5.4 Throughout this report, data for an individual WaSC or WoC company has been statistically analysed to compare against the average based on all WaSCs or WoCs as appropriate. This identifies outliers from the relevant average.

3.5.5 Throughout the report, data for Hafren Dyfrdwy is split between Hafren Dyfrdwy Powys customers and Hafren Dyfrdwy Wrexham customers. Powys customers are compared to other WaSCs (as they have both their water and sewerage supplied by Hafren Dyfrdwy), while Wrexham customers are compared to other WoCs (as they have their water supplied by Hafren Dyfrdwy and their sewerage by Dwr Cymru, Welsh Water). Section 11 of the report then combines the whole sample of Hafren Dyfrdwy customers and compares against WaSCs (in order to show data in-line with Hafren Dyfrdwy's regulatory positioning)

[8] "Generally, weighting efficiency results above the 80% mark indicate a high sample vs. population match. Dropping below 70% should be a reason to re-examine the weight scheme specifications or analysis design" Journal of the Market Research Society, 28, 3, 1986, pages 269-284 1 Weighting survey results, Trevor Sharot, Audits of Great Britain Ltd

3.6 Questionnaire

CCW's research with customers over the years consistently finds that most customers are uninformed about their services and bills, typically showing low awareness of their services other than the provision of tap water and the visible removal of wastewater[9].

To keep responses as close as possible to the average customer[10], the survey aimed to replicate this low-level of awareness in the initial 'uninformed' acceptability questions. The preamble to the survey referred to services in general terms, and customers were initially shown details of their water company's proposed bill changes without information relating to service levels and performance commitments.

The uninformed acceptability section of the questionnaire was structured as follows:

3.6.1 Customers were first asked to consider the acceptability of the proposed bill change from 2019 to 2020. The aim of this was to reflect that a bill is set over a year, and to start people thinking about bills in yearly chunks.

3.6.2 This was followed by a question to ask about the change each year to 2025, to reflect the bill profile over five years.

3.6.3 Finally, respondents were asked about the total change over the five years from 2019 to 2025. Customers of Water and Sewerage Companies (WaSCs), were asked about their combined water and sewerage bill, while customers of Water only Companies (WoCs) were asked to consider the proposed bill changes for water and sewerage separately before the combined bill. Bill figures included the Treasury's forecast for inflation across the period[11], and were adjusted to include this throughout

3.6.4 Data in the key findings for WoCs is based on combined acceptability (data for water only and sewerage only shown in the appendix).

3.6.5 Proposed bill changes were based on current bill amounts where provided by customers[12]. For customers who didn't supply both a water and sewerage bill amount, the average bill for the company in question was provided, and customers were informed of this.

After the uninformed acceptability section, customers were shown a snapshot of their water company's baseline service level proposals for water services, sewerage services and other

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[9] The questionnaire drew on previous acceptability research carried out by CCW. The 2019 survey was reviewed and adapted to reflect changes to the business planning process since the last survey in 2014.

[10] Gaining an uninformed response is important because once a respondent is informed, they are not representative of the average bill payer who knows little about the industry, company services and investment programmes. The uninformed response most closely represents how the average bill payer will react when they get their bill.

[11] Treasury forecast of inflation calculated at 2% per annum.

[12] Overall, 4,329 (41%) of customers provided a water and a sewerage bill amount; 6,153 (59%) customers were either unable to provide a bill amount or provided an incomplete bill amount so were shown the average bill figure and projections based on this for their water company throughout the survey.

services (customer service, Corporate Social Responsibility etc.). After seeing the snapshot of service levels (with a comparison between current and proposed service levels for 2025) customers were asked to rate acceptability for each i.e. water services, sewerage services, and combined services (with the same approach adopted for customers of WaSCs and WoCs).

Customers were next asked to rate how acceptable they find the potential bill range for ODIs - the mechanism by which customer bills could be higher or lower than charges for the baseline service proposals, depending on company performance against its service level targets. Customers were shown the maximum decrease in bills should their water company be penalised for failing to meet all of its service commitments, and the maximum increase in bills should their water company be rewarded for exceeding all of its commitments. Customers were informed that it would be unlikely for a company to either miss or exceed all of its commitments, meaning that the likelihood would be that (from 2022, when it will be clear whether companies are meeting, exceeding or falling below service commitment targets) bills would likely fall somewhere within the middle of the possible bill range.

Customers were asked two affordability questions; one at the beginning of the survey (before any information about the proposed bills and service levels had been shown) concerning the affordability of their current water and sewerage bill, and a second after the uninformed and informed acceptability sections about the affordability of the proposed bill (before the ODI section).

3.7 Interpretation of data

3.7.1 Please note that where percentages do not add to 100 this may be due several factors:

- Rounding
- The exclusion of 'don't know' categories from the charts or tables
- Multiple answers.

3.7.2 Individual water company results are mentioned in bullet points where they are statistically different to the average for WaSCs (if they are a WaSC) or WoCs (if they are a WoC). This approach flags outliers in the industry. Where there are comments about differences in sub groups (age, SEC, household income, metered/unmetered, vulnerable groups etc.) these reflect significant differences compared to other bands within that sub-group (e.g. a significant difference between 16-29s and 30-44s).

3.7.3 The table below shows the statistical reliability of results for total base sample sizes of c. 11,000 (the total sample), c.10,000 (the total sample for England), c.1,000 (the total sample for Wales) and 500 (the approximate sample achieved for each water company).

Table 3: Sampling tolerance

	Approximate sampling tolerances applicable to percentages at or near these levels		
Base size	**10% or 90%**	**30% or 70%**	**50%**
11,000 (c. total sample)	± 0.6%	± 0.9%	±0.9%
10,000 (c. total England)	± 0.6%	± 0.9%	± 1.0%
1,000 (total Wales)	± 2.0%	± 3.0%	± 3.3%
500 (total per water company)	± 2.6%	± 4.0%	± 4.4%

4. Setting the scene – bills and the cost of living

During the course of the interview, respondents were asked what their current annual water and sewerage bills are. They were also asked how far they agreed with a number of statements relating to bills and the cost of living. Analysing the data from these questions allows us to draw conclusions about respondent views on the bills and the cost of living generally:

- Overall, the average bill of customers who took part in this research is £410. Customers in England have a slightly lower average bill (£409) than customers in Wales (£418).
- On average, customers of WaSCs pay £416 for their water and sewerage bill per year.
  - Customers of South West Water have the highest average bill of any WaSC at £551, significantly higher than any other water company.
  - Customers of Hafren Dyfrdwy (Powys) have the lowest average bill of any WaSC at £297.
- On average, customers of WoCs pay £404 for their water and sewerage bill per year.[13]
  - Customers of Essex and Suffolk Water have the highest average bill of any WoC at £447 per year.
  - Customers of South Staffs Water have the lowest average bill of any WoC at £334 per year.
- Most customers (81%) agree that it is hard to predict what level inflation is going to reach in the next few years. Customers in Wales are more likely to agree with this statement (84%) than customers in England (81%).
- The majority (85%) agree that they know that all bills change by inflation over time – with customers in England and Wales equally likely to agree (both 85%).
- 33% of customers agree that they **don't** think about the impact of inflation on bills – with customers in England and Wales equally likely to agree (both 33%).
- A significant minority of customers (35%) think it is unlikely that their household income will keep up with inflation over the next 5 years (36% of customers in England and 28% of customers in Wales).
- Overall, 68% of customers say they have no problems paying their water bill. However, 23% say they do have difficulty paying their bill, but always pay on time while 7% say

[13] For WoC sewerage bills in water company areas where there is more than one sewerage supplier, the average across the suppliers within the region is used to calculate the average bill.

they have difficulties paying their bill and either sometimes or always pay it late (5% sometimes pay late and 2% never pay on time):

  - There is little difference between customers in England and Wales in this regard, with 68% of customers in England reporting they have no problems paying their water bill compared to 67% of customers in Wales.

- 5% of customers report having experienced issues with their water and/or sewerage services at home which they say affected their responses to the survey.
  - Customers in Wales are slightly more likely to report having experienced issues than customers in England (7% cf. 5%)
  - Overall, customers who report having experienced issues are less likely to consider their water company's proposals acceptable than customers who haven't, at both an uninformed and informed level:
    - Customers who have experienced issues are significantly less likely to consider the proposed (uninformed) change from 2019-20 acceptable than those who haven't experienced issues (79% cf. 88%)
    - Similarly, for yearly changes at the uninformed level, customers who have experienced issues are significantly less likely to consider the change acceptable than those who haven't (76% cf. 88%)
    - At the total change level for uninformed acceptability, those who have experienced issues are again significantly less likely to consider the proposed changes acceptable than those who haven't (79% cf. 89%)
    - At the informed level for water services, 78% of customers who have experienced an issue find the proposed bill and associated service levels acceptable, compared to 88% of customers who haven't experienced an issue
    - At the informed level for sewerage services, 74% of customers who have experienced an issue find the proposed bill and associated service levels acceptable compared to 87% of customers who haven't experienced an issue
    - At the informed level for combined services, 78% of customers who have experienced an issue find the proposed bill and associated service level acceptable, compared to 87% of customers who haven't experienced an issue.
  - Among customers who have experienced an issue, both current affordability (55%) and future affordability (64%) is significantly lower than for those who have experienced no issues (67% among those who have experienced no issues for current affordability and 78% for future affordability).

4.1 Household income

4.1.1 Customers were asked to include a banded figure for their annual household income before tax. Data for WaSCs is shown in figure 2 below and data for WoCs in figure 3 which follows.

Figure 2: Household income amongst WaSC customers

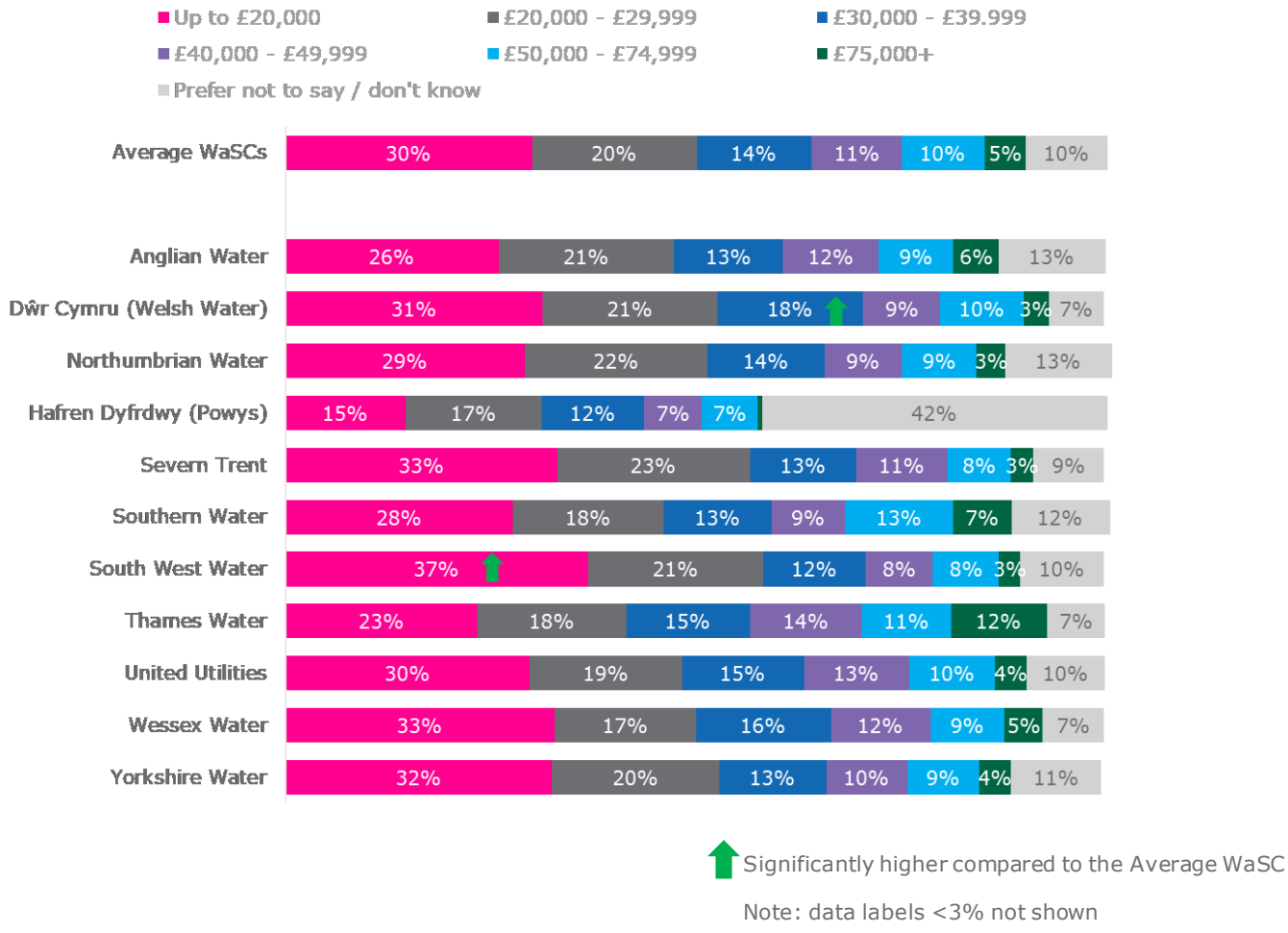
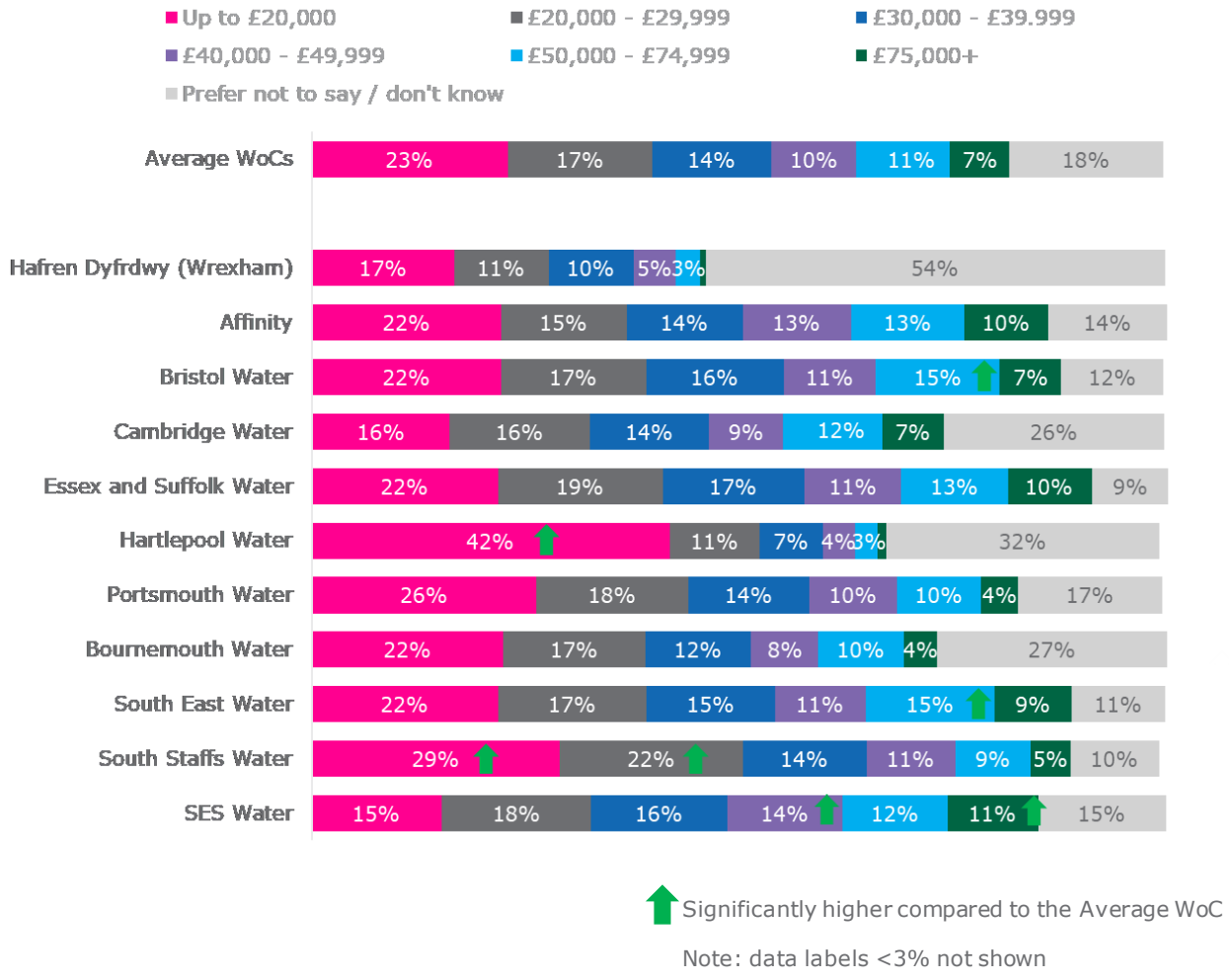


Figure 3: Household income amongst WoC customers



In areas where a higher proportion of interviews were conducted face to face (particularly Hafren Dyfrdwy, Hartlepool Water and Cambridge Water), the proportion of customers who opt for 'prefer not to say' in response to the household income question is higher than in areas where more interviews were done via online panel.

Household income (where specified) tends to be higher among customers in the south of England, with customers of Thames Water, Affinity Water, Essex and Suffolk Water and SES Water more likely to have a household income of £75,000 or more.

Customers of Hartlepool Water are most likely to have an income of £20,000 or less (42%), followed by those of South West Water (37%), Severn Trent (33%) and Wessex Water (33%).

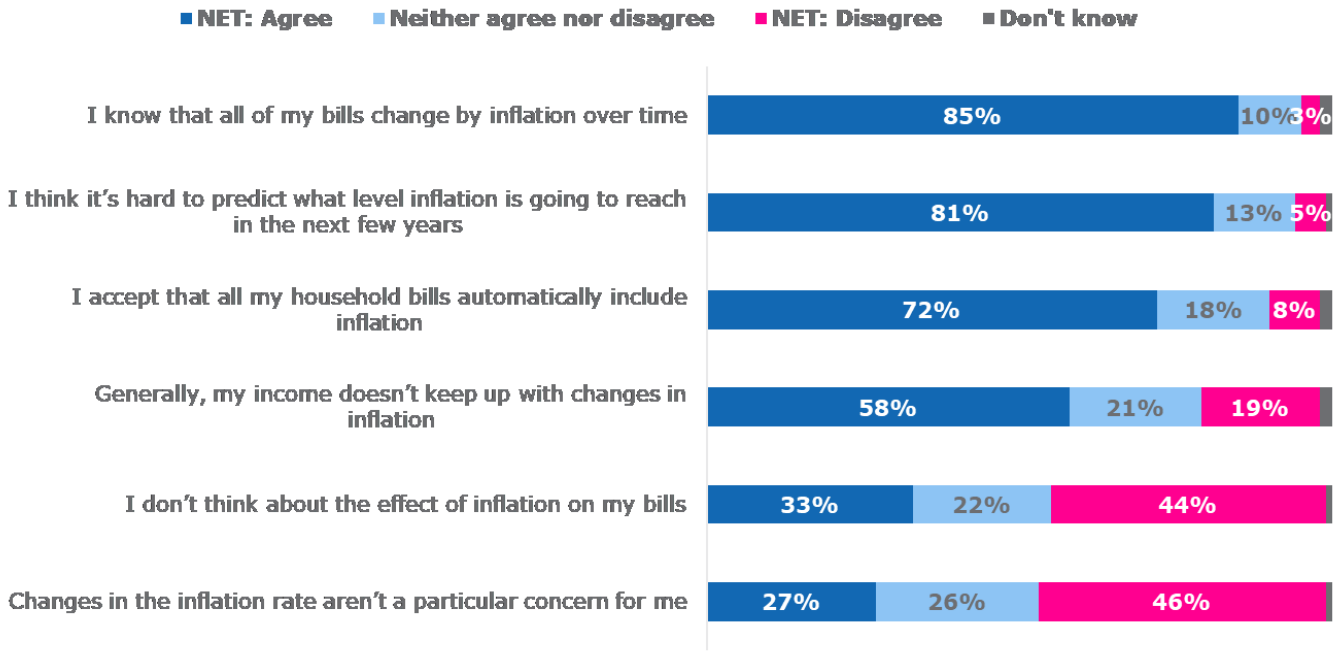
Over half (51%) of customers with a household income £20,000 or less report having difficulties paying their bill, compared to 34% overall.

Additionally, just under half (48%) of those with a household income of £20,000 or less say that it's unlikely their income will keep up with inflation over the next five years, compared to 35% overall.

4.2 The cost of living

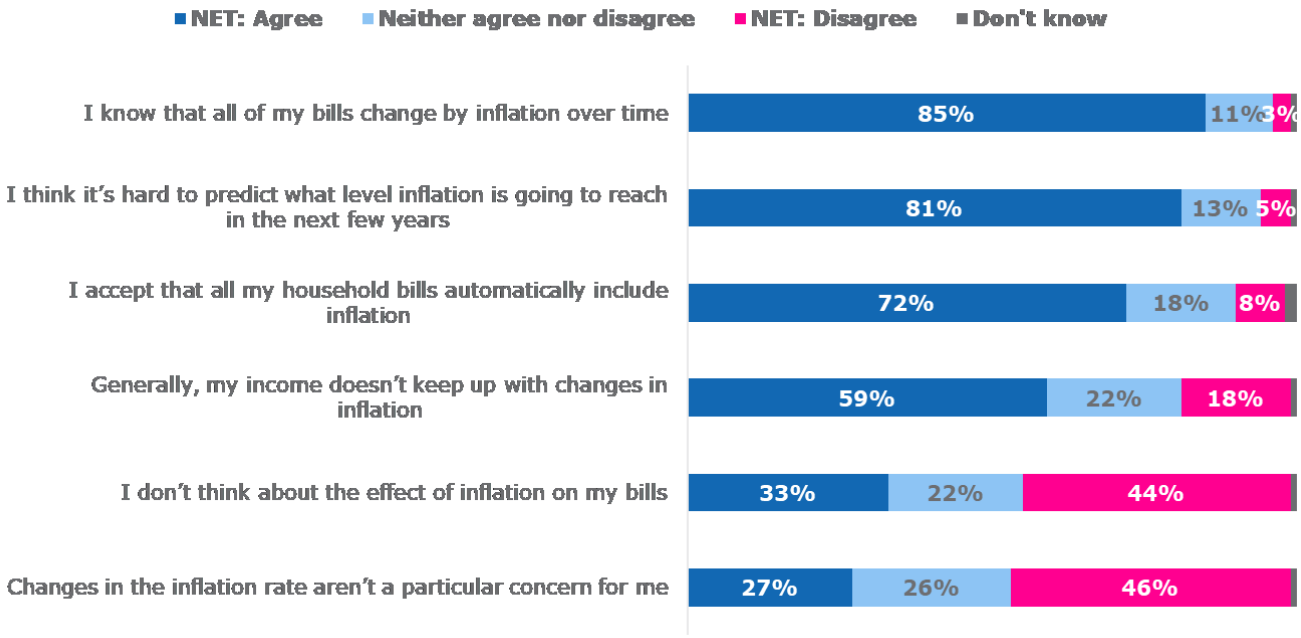
4.2.1 In order to understand the context of responses, especially in relation to current and future affordability, customers were asked a series of questions about the cost of living. Responses to these questions among all customers, customers in England only and customers in Wales only are shown in figures 4-6 below:

Figure 4: The cost of living, England and Wales



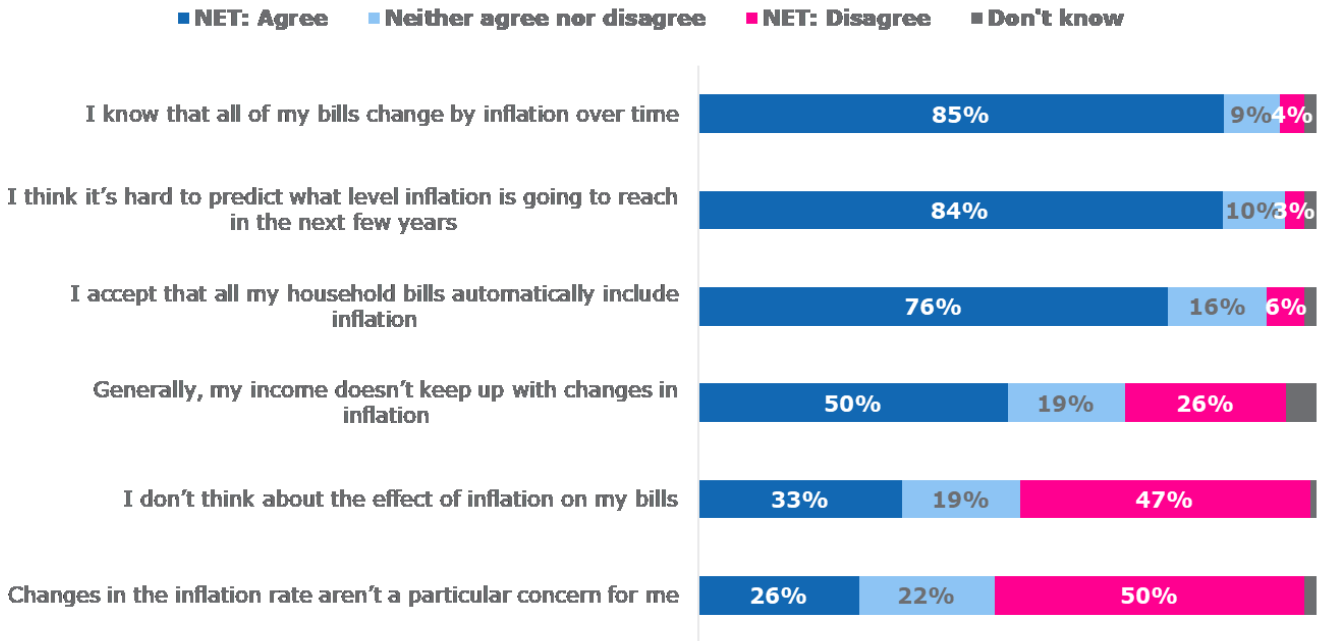
Note: data labels <3% not shown

Figure 5: The cost of living, England



Note: data labels <3% not shown

Figure 6: The cost of living, Wales



Note: data labels <3% not shown

4.2.2 Customers in England are significantly less likely to agree that it's hard to predict what level inflation is going to reach in the next few years than customers in Wales (81% cf. 84%).

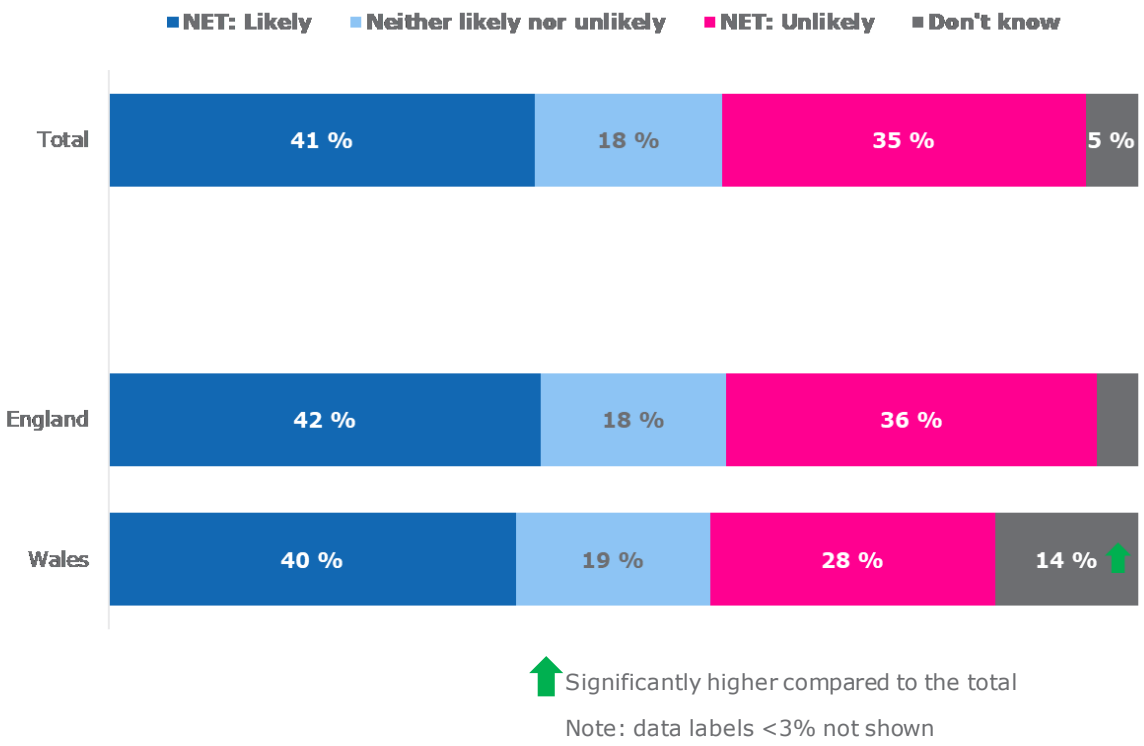
4.2.3 Similarly, customers in England are significantly less likely to agree with the statement "I accept that all my household bills automatically include inflation" than customers in Wales (72% cf. 76%).

4.2.4 Customers in England are significantly more likely to agree with the notion that "generally, my income doesn't keep up with changes in inflation" than customers in Wales (59% cf. 50%).

4.2.5 Those who consider their current bill affordable are significantly more likely to accept that household bills automatically include inflation (80%) than those who don't consider their current bill affordable (60%).

4.2.6 Customers aged 30-44 and 45-59 are more likely to agree that their income doesn't keep up with inflation (both 66%), compared to 59% overall.

Figure 7: Likelihood of household income keeping up with inflation



4.2.7 There is no significant difference in outlook regarding the likelihood of household income keeping up with inflation between customers in England and Wales (42% cf. 40%).

4.2.8 Those aged 16-29 are most likely to be positive in this regard, with more than half (55%), saying they think it's likely their income will keep up with inflation, whilst those aged 45-59 (36%) are least likely to think this way.

4.2.9 Those in higher SEC groups are more likely than average to think their household income will keep up with inflation (49% in higher managerial, administrative and professional occupations) than those in lower SEC groups (30% of those who are long term unemployed / never worked / students think it likely that their household income will keep up with inflation).

4.3 Current bills

4.3.1 Customers were asked to provide their water and sewerage bill (for 12 months). Those who provided an amount (for both water and sewerage), they were then asked if this was from a bill or a best estimate. Any customers not aware of their bill (either water, sewerage or both) were shown the company's average bill during the survey. Overall, 18% of WaSC customers provided actual bill figures and 17% an estimate, while for WoC customers, 19% provided an actual bill figure and 26% an estimate. The charts below show the breakdown of average bill amounts per water company across those who provided an actual bill, those who provided an estimate and the average company bill (shown to those who didn't provide a figure).

Figure 8: Bill figures, WaSCs

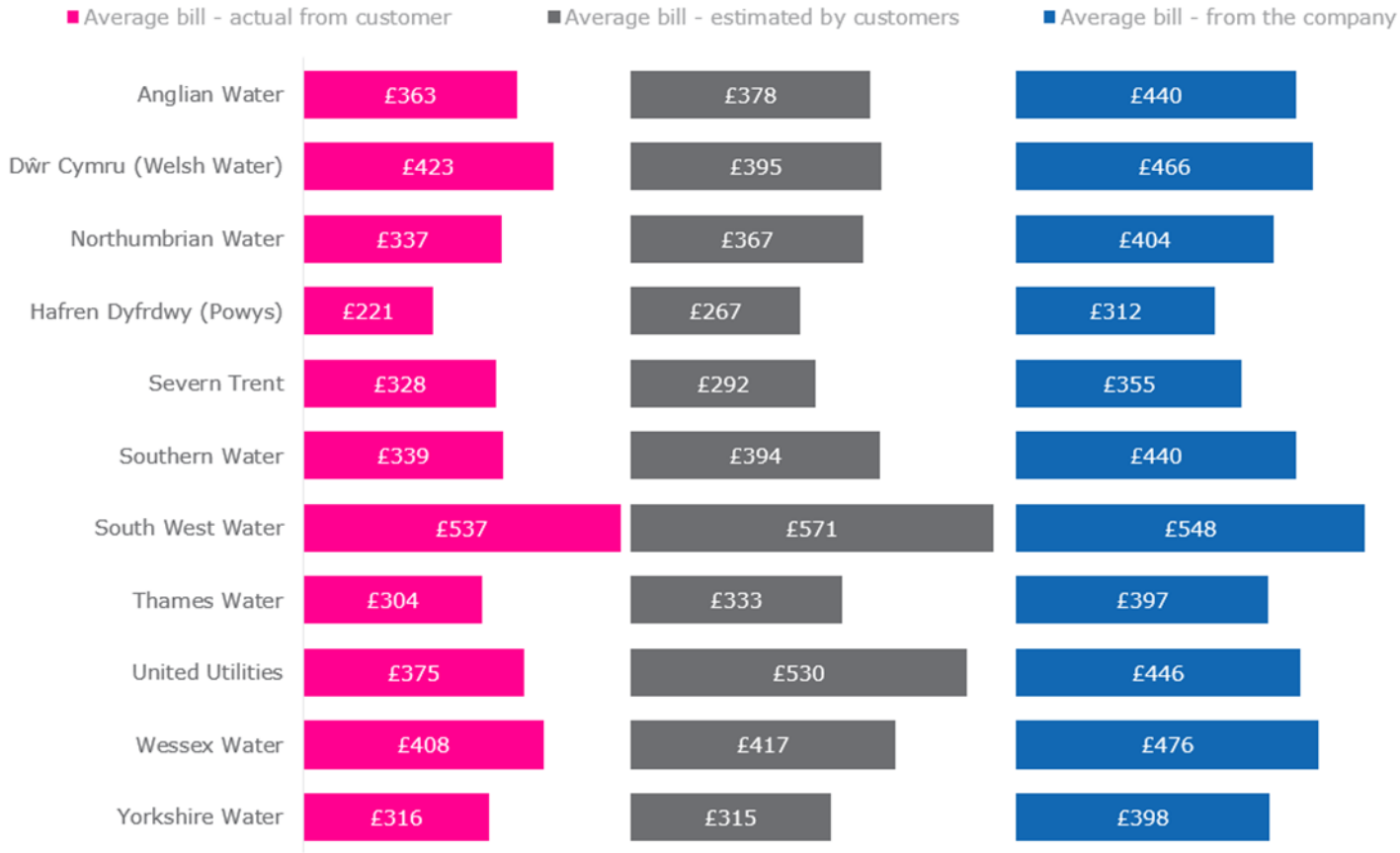
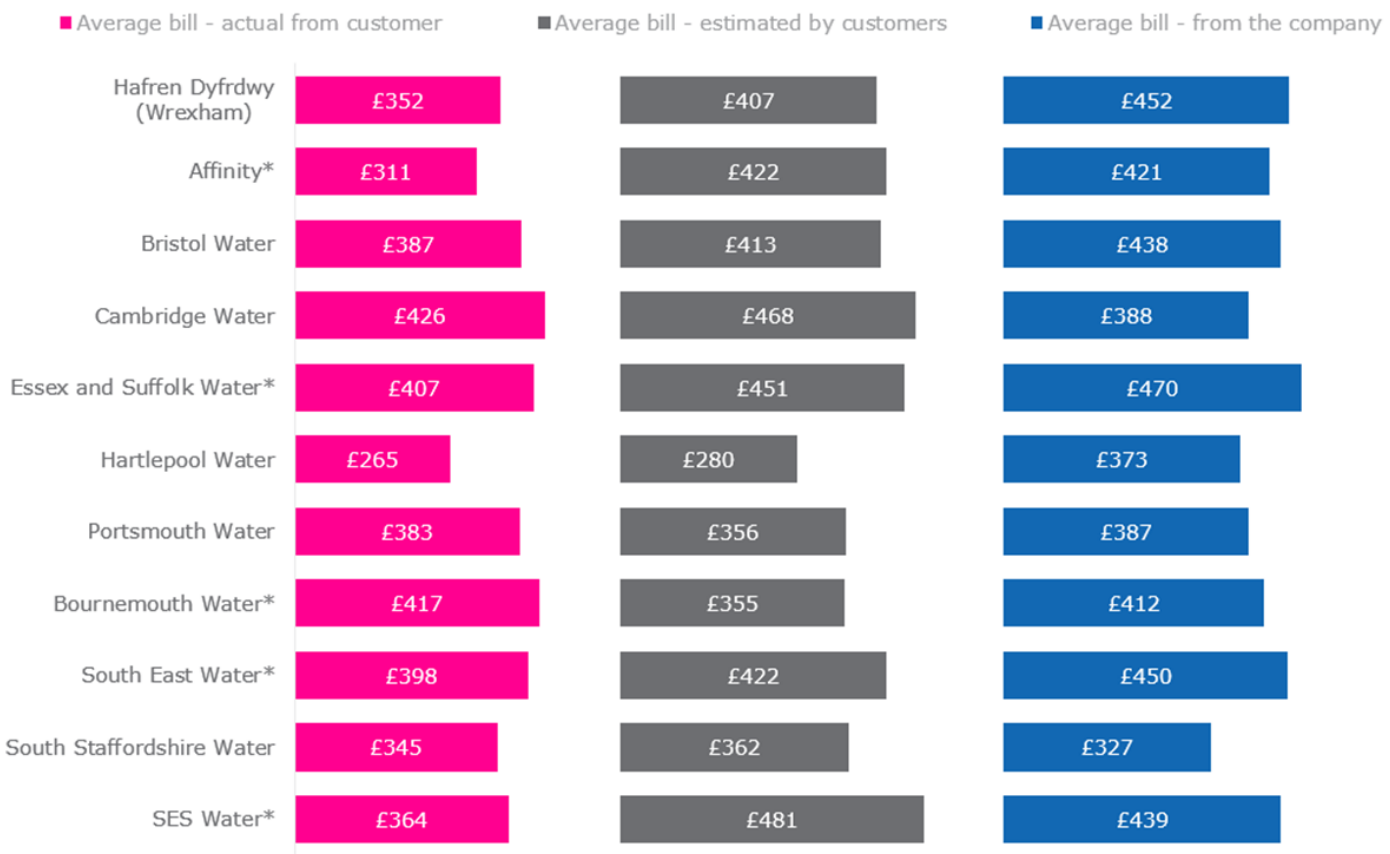


Figure 9: Bill figures, WoCs



*WoCs with more than one sewerage service provider in the region show an average water and sewerage bill across the different suppliers

4.3.2 Among customers of WaSCs who provided a bill amount, only South West Water customers (where bills are highest) and United Utilities customers who provided a best estimate don't provide bill figures that are significantly below the actual company average.

4.3.3 Among customers of WoCs who provided a bill amount, customers are generally closer to the actual company average than WaSC customers, although Hartlepool Water customers in particular report bill figures significantly below the actual company average.

4.3.4 Customers who provided a bill amount are more likely than those who didn't:

- to be metered (66% cf. 53%)
- to say they have no problems paying their water bill (70% cf. 66%).
- to be in higher managerial, administrative & professional occupations (48% cf. 38%).

4.3.5 The average bill figures that were shown to customers who took part in this survey are shown in the tables below. For WoCs where there is more than one sewerage service provider in the region, the figures for sewerage and combined bills are split by company to demonstrate the differences in bill level.

Table 4: Average bills per year, WaSCs, water

	Current bill	2020/21	2021/22	2022/23	2023/24	2024/25	Total change (2025 – current bill)
Anglian Water	£192.00	£171.00	£177.00	£179.00	£183.00	£185.00	-£6.00
		-10.58%	2.96%	1.58%	2.25%	1.09%	
Dwr Cymru (Welsh Water)	£189.00	£166.00	£169.00	£173.00	£177.00	£181.00	-£8.00
		-12.21%	1.50%	2.34%	2.45%	2.30%	
Northumbrian Water	£182.07	£146.27	£149.19	£152.18	£155.22	£158.33	-£23.74
		-19.66%	2.00%	2.00%	2.00%	2.00%	
Hafren Dyfrdwy (Powys)	£154.00	£151.00	£149.00	£152.00	£157.00	£158.00	+£4.00
		-2.27%	-1.33%	2.53%	2.79%	0.96%	
Severn Trent	£175.00	£177.75	£182.50	£186.00	£190.00	£197.00	+£22
		1.57%	2.67%	1.92%	2.15%	3.68%	
Southern Water	£155.00	£146.00	£149.00	£152.00	£155.00	£158.00	+£3.00
		-6.06%	1.99%	1.99%	2.00%	2.00%	
South West Water	£219.20	£207.20	£206.80	£206.40	£206.40	£206.40	-£12.80
		-5.47%	-0.19%	-0.19%	0.00%	0.00%	
Thames Water	£210.00	£187.00	£200.00	£206.00	£211.00	£216.00	+£6.00
		-0.107	6.67%	3.42%	2.38%	1.98%	
United Utilities	£215.00	£191.00	£197.00	£201.00	£202.00	£205.00	-£10.00
		-11.16%	3.14%	2.03%	0.50%	1.49%	
Wessex Water	£262.00	£224.00	£237.00	£239.00	£239.00	£243.00	£19.00
		-14.50%	5.80%	0.84%	0.00%	1.67%	
Yorkshire Water	£174.00	£167	£169	£169	£173	£174	+£0
		-4.23%	1.19%	0.09%	2.39%	0.50%	

Table 5: Average bills per year, WaSCs, sewerage

	Current bill	2020/21	2021/22	2022/23	2023/24	2024/25	Total change (2025 – current bill)
Anglian Water	£248	£224	£226	£232	£236	£242	-£6.00
		-9.98%	1.23%	2.33%	1.81%	2.71%	
Dwr Cymru (Welsh Water)	£297.57	£261.23	£266.67	£271.03	£275.28	£279.66	-£17.91
		-12.21%	2.08%	1.64%	1.57%	1.59%	
Northumbrian Water	£222.76	£138.92	£141.70	£144.54	£147.43	£150.38	-£96.12
		-37.64%	2.00%	2.00%	2.00%	2.00%	
Hafren Dyfrdwy (Powys)	£158.25	£152.75	£160.25	£161.25	£163.00	£167.75	+£9.50
		-3.48%	4.91%	0.62%	1.09%	2.91%	
Severn Trent	£179.50	£165.25	£168.25	£171.75	£175.00	£175.50	-£4.00
		-7.94%	1.82%	2.08%	1.89%	0.29%	
Southern Water	£284.73	£236.96	£241.66	£246.49	£251.42	£256.45	-£28.28
		-16.78%	1.98%	2.00%	2.00%	2.00%	
South West Water	£328.80	£310.80	£310.20	£309.60	£309.60	£309.60	-£19.20
		-5.47%	-0.19%	-0.19%	0.00%	0.00%	
Thames Water	£188.09	£166.81	£171.11	£174.69	£177.39	£181.00	-£7.09
		-11.31%	2.58%	2.09%	1.55%	2.04%	
United Utilities	£231.00	£210.00	£212.00	£217.00	£224.00	£229.00	-£2.00
		-9.09%	0.95%	2.36%	3.23%	2.23%	
Wessex Water	£248.00	£223.00	£213.00	£220.00	£227.00	£233.00	+£10.00
		-10.08%	-4.48%	3.29%	3.18%	2.64%	
Yorkshire Water	£224.03	£194.96	£200.15	£207.38	£210.87	£217.69	-£6.68
		-12.98%	2.67%	3.61%	1.68%	3.23%	

Table 6: Average bills per year, WaSCs, combined (total bill)

	Current bill	2020/21	2021/22	2022/23	2023/24	2024/25	Total change (2025 – current bill)
Anglian Water	£440	395.11	402.95	411.01	419.22	427.60	-£12.60
		-10.24%	1.98%	2.00%	2.00%	2.00%	
Dwr Cymru (Welsh Water)	£465.87	£408.98	£417.16	£425.50	£434.01	£442.69	-£23.18
		-12.21%	2.00%	2.00%	2.00%	2.00%	
Northumbrian Water	£404.83	£285.19	£290.89	£296.72	£302.65	£308.71	-£96.12
		-29.55%	2.00%	2.00%	2.00%	2.00%	
Hafren Dyfrdwy (Powys)	£312.25	£303.25	£308.75	£313.50	£319.50	£325.75	+13.50
		-2.88%	1.81%	1.54%	1.91%	1.96%	
Severn Trent	£354.50	£343.00	£350.75	£357.75	£365.00	£372.25	+£17.75
		-3.24%	2.26%	2.00%	2.03%	1.99%	
Southern Water	£440.13	£382.94	£390.54	£398.34	£406.31	£414.44	-£25.69
		-12.99%	1.98%	2.00%	2.00%	2.00%	
South West Water	£548.00	£518.00	£517.00	£516.00	£516.00	£516.00	-£32.00
		-5.47%	-0.19%	-0.19%	0.00%	0.00%	
Thames Water	£397.63	£353.93	£370.72	£381.12	£388.74	£396.54	£1.09
		-10.99%	4.74%	2.81%	2.00%	2.01%	
United Utilities	£446.00	£402.00	£410.00	£418.00	£426.00	£435.00	-£11.00
		-9.87%	1.99%	1.95%	1.91%	2.11%	
Wessex Water	£476.00	£414.00	£422.00	£431.00	£440.00	£448.00	-£28.00
		-13.03%	1.93%	2.13%	2.09%	1.82%	
Yorkshire Water	£398.03	£361.60	£368.78	£376.15	£383.67	£391.35	-£6.68
		-9.15%	1.98%	2.00%	2.00%	2.00%	

Table 7: Average bills per year, WoCs, water

	Current bill	2020/21	2021/22	2022/23	2023/24	2024/25	Total change (2025 – current bill)
Hafren Dyfrdwy - Wrexham	£154.00	£151	£149	£152	£157	£158	+£4.00
		-2.27%	-1.33%	2.53%	2.79%	0.96%	
Affinity Water	£180.00	£159	£162	£167	£170	£173	-£7.00
		-11.56%	2.00%	2.68%	2.00%	2.00%	
Bristol Water	£190	£165	£168	£171	£175	£178	-£12.00
		-13.16%	1.82%	1.79%	2.34%	1.71%	
Cambridge Water	£139.00	£126	£126	£126	£126	£126	-£13.00
		-9.42%	-0.57%	0.24%	0.21%	0.18%	
Essex & Suffolk Water	£252.00	£203	£207	£211	£215	£219	-£33.00
		-19.67%	2.00%	2.00%	2.00%	2.00%	
Hartlepool Water	£150.00	£134	£136	£134	£131	£129	-£21.00
		-10.67%	1.49%	-1.47%	-2.24%	-1.53%	
Portsmouth Water	£102.00	£92	£94	£96	£97	£99	-£3.00
		-10.00%	2.00%	2.00%	2.00%	2.00%	
Bournemouth Water	£151.00	£143	£143	£142	£142	£142	-£9.00
		-5.30%	0.00%	-0.70%	0.00%	0.00%	
South East Water	£213.81	£195.64	£199.55	£203.55	£207.61	£211.76	-£2.05
		-8.50%	2.00%	2.00%	2.00%	2.00%	
South Staffs Water	£147.00	£134	£133	£134	£134	£134	-£12.00
		-8.85%	-0.43%	0.34%	0.31%	0.29%	
SES Water	£202.00	£170	£173	£177	£180	£184	-£18.00
		-15.99%	1.98%	2.00%	2.00%	2.00%	

Table 8: Average bills per year, WoCs, sewerage

	Current bill	2020/21	2021/22	2022/23	2023/24	2024/25	Total change (2025 – current bill)
Hafren Dyfrdwy – Wrexham (Dwr Cymru)	£297.57	£261.23	£266.67	£271.03	£275.28	£279.66	-£17.91
		-12.21%	2.08%	1.64%	1.57%	1.59%	
Affinity Water (Anglian Water)	£248.48	£223.68	£226.44	£231.71	£235.90	£242.29	-£6.19
		-9.98%	1.23%	2.33%	1.81%	2.71%	
Affinity Water (Southern Water)	£284.73	£236.96	£241.66	£246.49	£251.42	£256.45	-£28.28
		-16.78%	1.98%	2.00%	2.00%	2.00%	
Affinity Water (Thames Water)	£188.09	£166.81	£171.11	£174.69	£177.39	£181.00	-£7.09
		-11.31%	2.58%	2.09%	1.55%	2.04%	
Bristol Water (Wessex Water)	£248.00	£223.00	£213.00	£220.00	£227.00	£233.00	-£15.00
		-10.08%	-4.48%	3.29%	3.18%	2.64%	
Cambridge Water (Anglian Water)	£248.48	£223.68	£226.44	£231.71	£235.90	£242.29	-£6.19
		-9.98%	1.23%	2.33%	1.81%	2.71%	
Essex & Suffolk Water (Anglian Water)	£248.48	£223.68	£226.44	£231.71	£235.90	£242.29	-£6.19
		-9.98%	1.23%	2.33%	1.81%	2.71%	
Essex & Suffolk Water (Thames Water)	£188.09	£166.81	£171.11	£174.69	£177.39	£181.00	-£7.09
		-11.31%	2.58%	2.09%	1.55%	2.04%	
Hartlepool Water (Northumbrian Water)	£222.76	£138.92	£141.70	£144.54	£147.43	£150.38	-£72.38
		-37.64%	2.00%	2.00%	2.00%	2.00%	
Portsmouth Water (Southern Water)	£284.73	£236.96	£241.66	£246.49	£251.42	£256.45	-£28.28
		-16.78%	1.98%	2.00%	2.00%	2.00%	
Bournemouth Water (Wessex Water)	£237.00	£208.00	£222.00	£236.00	£246.00	£257.00	+£20.00
		-12.24%	6.73%	6.31%	4.24%	4.47%	
Bournemouth Water (Southern Water)	£284.86	£267.43	£272.64	£277.92	£283.32	£288.82	+£3.96
		-6.12%	1.95%	1.94%	1.94%	1.94%	
South East Water (Thames Water)	£188.09	£166.81	£171.11	£174.69	£177.39	£181.00	-£7.09
		-11.31%	2.58%	2.09%	1.55%	2.04%	
South East Water (Southern Water)	£284.73	£236.96	£241.66	£246.49	£251.42	£256.45	-£28.28
		-16.78%	1.98%	2.00%	2.00%	2.00%	
South Staffs Water (Severn Trent Water)	£179.50	£165.25	£168.25	£171.75	£175.00	£175.50	-£4.00
		-7.94%	1.82%	2.08%	1.89%	0.29%	
SES Water (Thames Water)	£188.09	£166.81	£171.11	£174.69	£177.39	£181.00	-£7.09
		-11.31%	2.58%	2.09%	1.55%	2.04%	
SES Water (Southern Water)	£284.73	£236.96	£241.66	£246.49	£251.42	£256.45	-£28.28
		-16.78%	1.98%	2.00%	2.00%	2.00%	

Table 9: Average bills per year, WoCs, combined (total bill)

	Current bill	2020/21	2021/22	2022/23	2023/24	2024/25	Total change (2025 – current bill)
Hafren Dyfrdwy – Wrexham (Dwr Cymru)	£451.57	£411.73	£415.17	£423.28	£431.78	£437.66	-£13.91
		-8.82%	0.83%	1.95%	2.01%	1.36%	
Affinity Water (Anglian Water)	£428.47	£382.86	£388.81	£398.43	£405.95	£415.74	-£12.73
		-10.64%	1.55%	2.47%	1.89%	2.41%	
Affinity Water (Southern Water)	£464.72	£396.14	£404.02	£413.21	£421.47	£429.90	-£34.82
		-14.76%	1.99%	2.27%	2.00%	2.00%	
Affinity Water (Thames Water)	£368.08	£325.99	£333.47	£341.41	£347.44	£354.45	-£13.63
		-11.43%	2.30%	2.38%	1.77%	2.02%	
Bristol Water (Wessex Water)	£438.00	£388.00	£381.00	£391.00	£402.00	£411.00	-£27.00
		-11.42%	-1.80%	2.62%	2.81%	2.24%	
Cambridge Water (Anglian Water)	£387.90	£349.97	£352.00	£357.57	£362.03	£368.65	-£19.25
		-9.78%	0.58%	1.58%	1.25%	1.83%	
Essex & Suffolk Water (Anglian Water)	£500.70	£426.30	£433.11	£442.51	£450.91	£461.61	-£39.10
		-14.86%	1.60%	2.17%	1.90%	2.37%	
Essex & Suffolk Water (Thames Water)	£440.31	£369.42	£377.78	£385.49	£392.40	£400.31	-£40.00
		-16.10%	2.26%	2.04%	1.79%	2.02%	
Hartlepool Water (Northumbrian Water)	£372.76	£272.92	£277.70	£278.54	£278.43	£279.38	-£93.38
		-26.78%	1.75%	0.30%	-0.04%	0.34%	
Portsmouth Water (Southern Water)	£386.73	£328.76	£335.30	£342.00	£348.84	£355.82	-£30.91
		-14.99%	1.99%	2.00%	2.00%	2.00%	
Bournemouth Water (Wessex Water)	£388.00	£351.00	£365.00	£378.00	£388.00	£399.00	+£11.00
		-9.54%	3.99%	3.56%	2.65%	2.84%	
Bournemouth Water (Southern Water)	£435.86	£410.43	£415.64	£419.92	£425.32	£430.82	-£5.04
		-5.83%	1.27%	1.03%	1.29%	1.29%	
South East Water (Thames Water)	£401.90	£362.45	£370.66	£378.24	£385.00	£392.76	-£9.14
		-9.82%	2.27%	2.04%	1.79%	2.02%	
South East Water (Southern Water)	£498.54	£432.60	£441.21	£450.04	£459.03	£468.21	-£30.33
		-13.23%	1.99%	2.00%	2.00%	2.00%	
South Staffs Water (Severn Trent Water)	£326.20	£298.96	£301.39	£305.34	£309.01	£309.90	-£16.30
		-8.35%	0.81%	1.31%	1.20%	0.29%	
SES Water (Thames Water)	£390.30	£336.69	£344.36	£351.40	£357.64	£364.85	-£25.45
		-13.74%	2.28%	2.05%	1.77%	2.02%	
SES Water (Southern Water)	£486.94	£406.84	£414.91	£423.20	£431.67	£440.30	-£46.64
		-16.45%	1.98%	2.00%	2.00%	2.00%	

4.4 Affordability of water bills

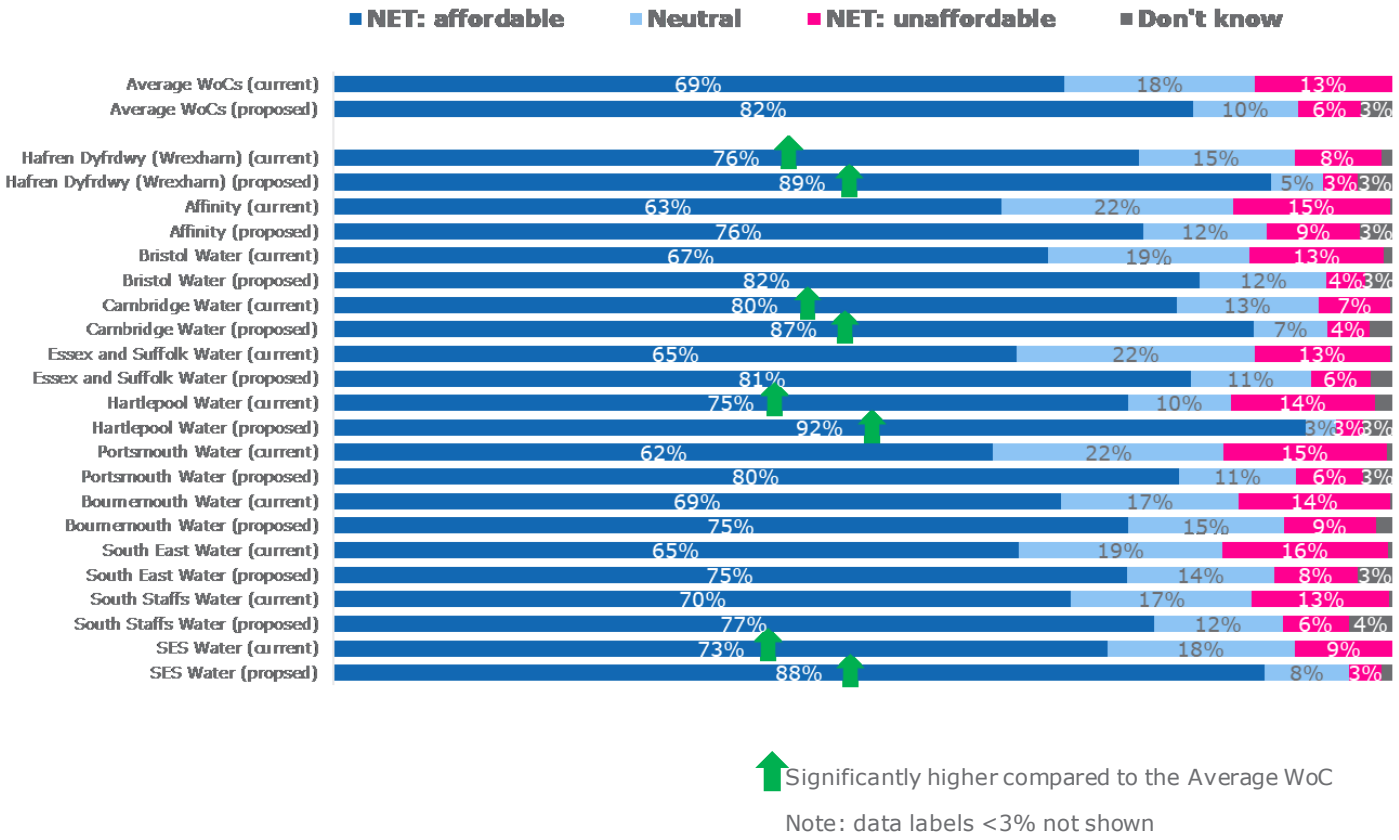
4.4.1 Customers were asked about the affordability of their current bill, and then, after the acceptability questions – both uninformed and informed – were asked about the affordability of the proposed bill.

4.4.2 There is no significant difference between customers in England and Wales in relation current or proposed future affordability. Two-thirds (66%) of customers in England consider their current bill affordable, compared to 67% of customers in Wales. When looking at proposed bill affordability, both groups of customers are significantly more likely to consider this affordable than they do currently (both 90%).

4.4.3 The charts below show customer responses to these questions by company.

Figure 10: Affordability, WaSCs

Figure 11: Affordability, WoCs



4.4.4 The percentage of customers who agree their current bills are affordable ranges from 49% (South West Water) to 80% (Cambridge Water).

5. Uninformed Acceptability

Respondents were first asked for their **uninformed** reaction to the proposed price changes to their bills.

For WaSC customers this involved seeing the proposed water and sewerage bill and being asked three acceptability questions:

- Acceptability of the proposed bill change from 2019 (current price review period) to 2020 (first year of the new price review period)
- Acceptability of the proposed bill change for each year of the new period to 2025
- Acceptability of the proposed bill overall, across the entirety of the new price review period (total change).

For WoC customers, the same question format applied as for WaSC customers, but it was asked across three different levels:

- Water services
- Sewerage services (for the customer's sewerage service provider)
- Combined services.

This survey was designed to take into account that customers of WoCs have two different suppliers – one for water and one for sewerage services. All bill information included forecast inflation.

The rationale behind the uninformed response questioning was to most closely represent how the average bill payer – who is likely to know little about the industry, their services and their investment programme – will react when they get their bill. Customers were asked these questions before being given any detailed information about the service levels that the water and sewerage companies were planning alongside the price changes.

The following sections detail uninformed acceptability across the three questions outlined above. For WoC companies, data is shown at a combined (water and sewerage) level.

5.1 Uninformed acceptability, bill change from 2019 to 2020

5.1.1 The tables below show company level uninformed acceptability from 2019 (the last year of the current price review period) to 2020 (the first year of the new price review period).

Figure 12: Uninformed acceptability by WaSCs, 2019/20

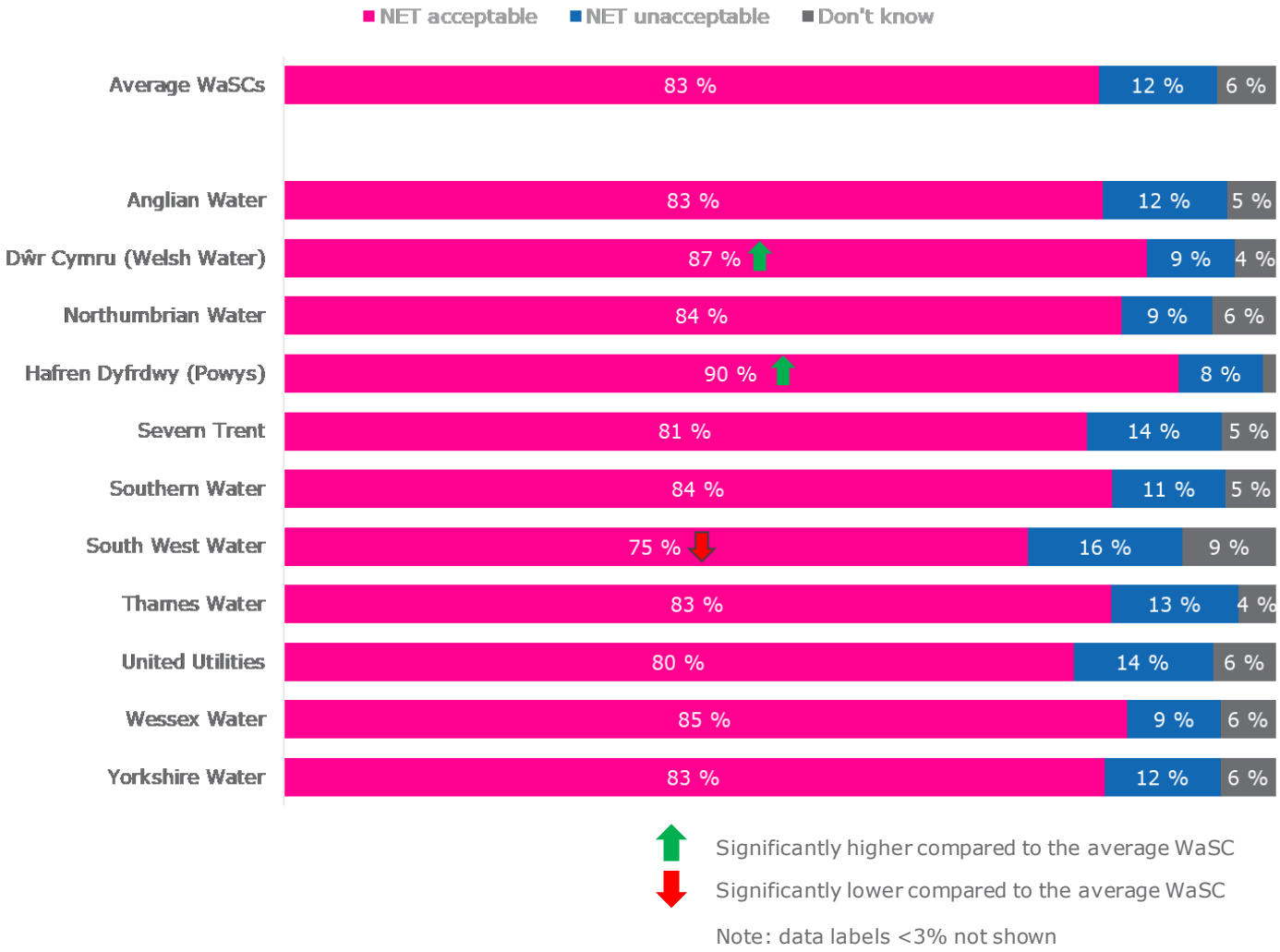
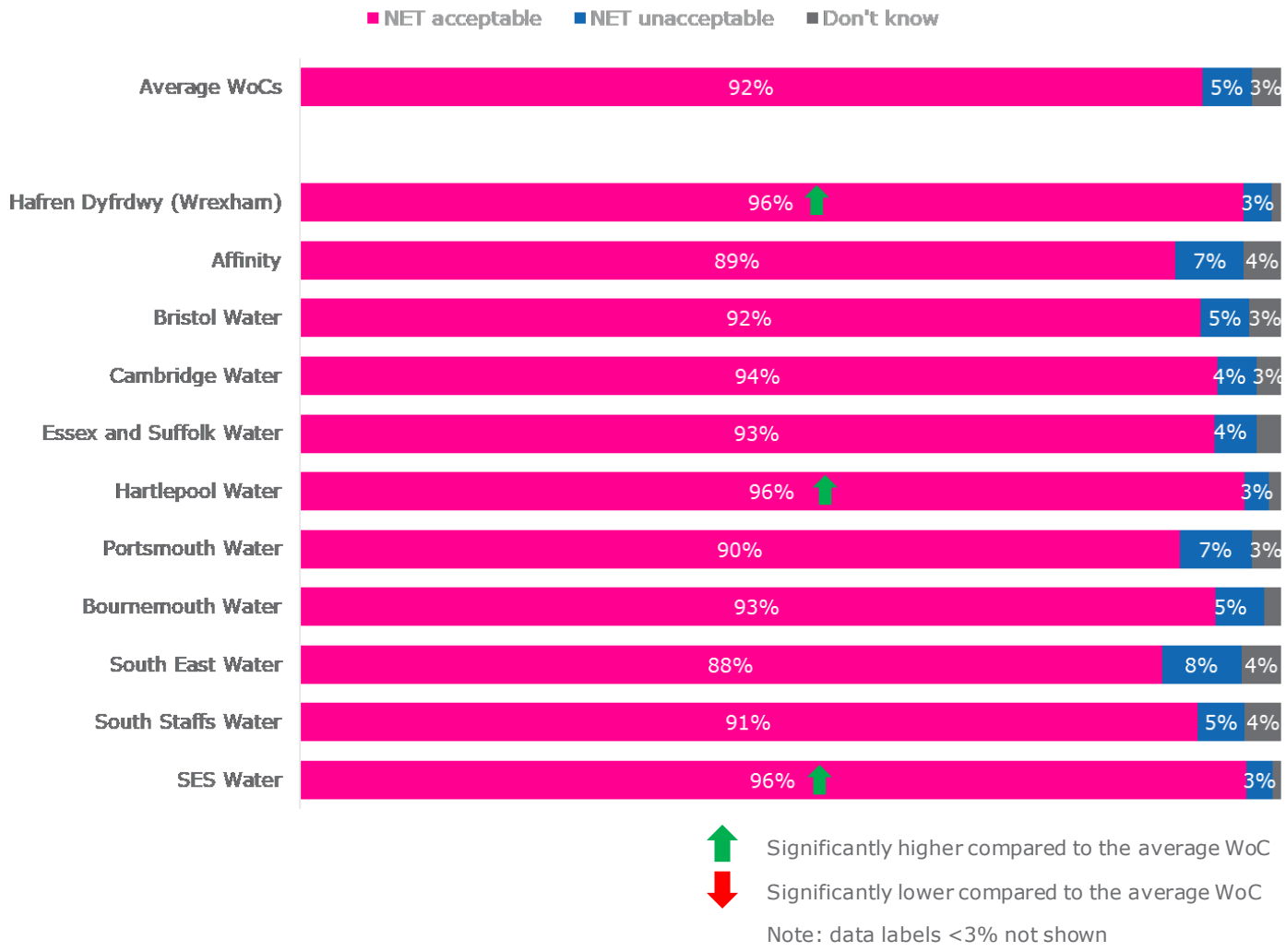


Figure 13: Combined uninformed acceptability by WoCs, 2019/20



5.1.2 Customers in Wales are more likely to consider the proposed bill change from 2019 to 2020 acceptable than customers in England (90% cf. 87%).

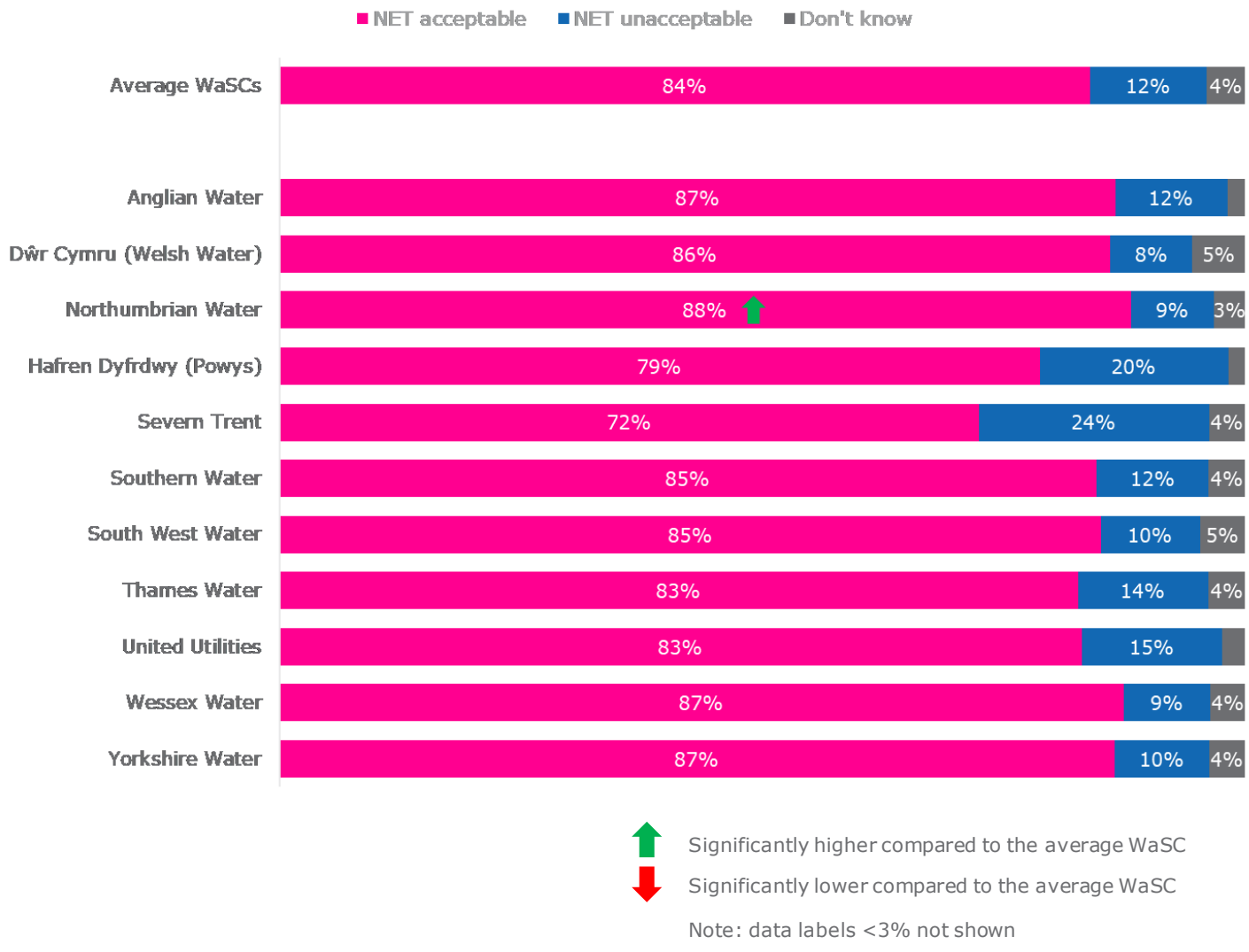
5.1.3 Among WaSCs, uninformed acceptability of the proposed bill change from 2019 to 2020 is highest among Hafren Dyfrdwy (Powys) customers at 90%, where bills are due to fall by 2.88% from 2019 to 2020. It is lowest among South West Water customers at 75%, where bills are due to fall by 5.47% from 2019 to 2020, but where current average bills are among the highest across all companies in England and Wales.

5.1.4 Among WoCs uninformed acceptability of the combined water and sewerage bill from 2019 to 2020 is joint highest among customers of Hafren Dyfrdwy (Wrexham), Hartlepool Water and SES Water (all 96%) and lowest among customers of South East Water 88%.

5.2 Uninformed acceptability, yearly bill change from 2020 to 2025

5.2.1 The charts below show company level year on year uninformed acceptability, from 2020 through to 2025.

Figure 14: Uninformed acceptability by WaSCs, yearly change

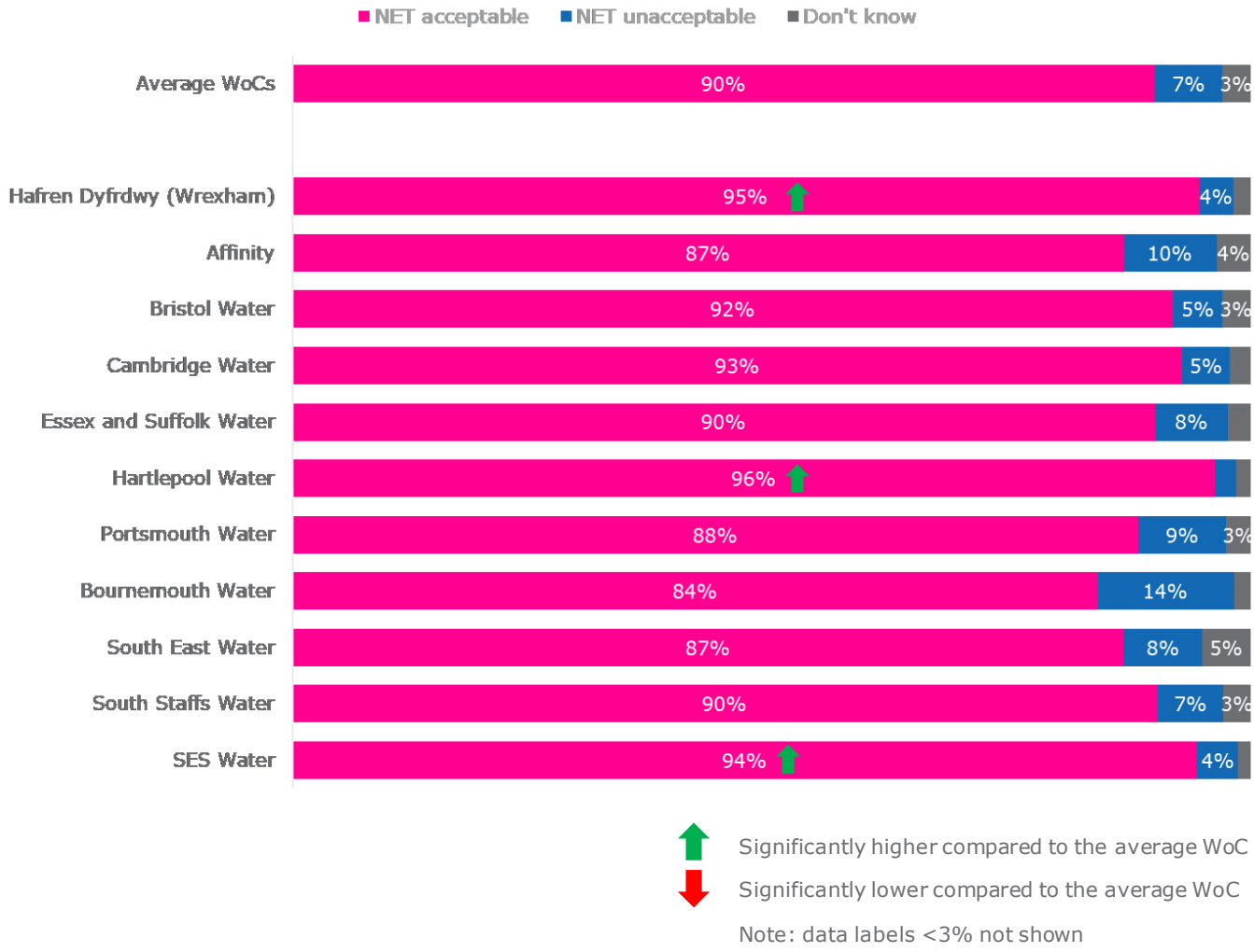


Significantly higher compared to the average WaSC

Significantly lower compared to the average WaSC

Note: data labels <3% not shown

Figure 15: Combined uninformed acceptability by WoCs, yearly change

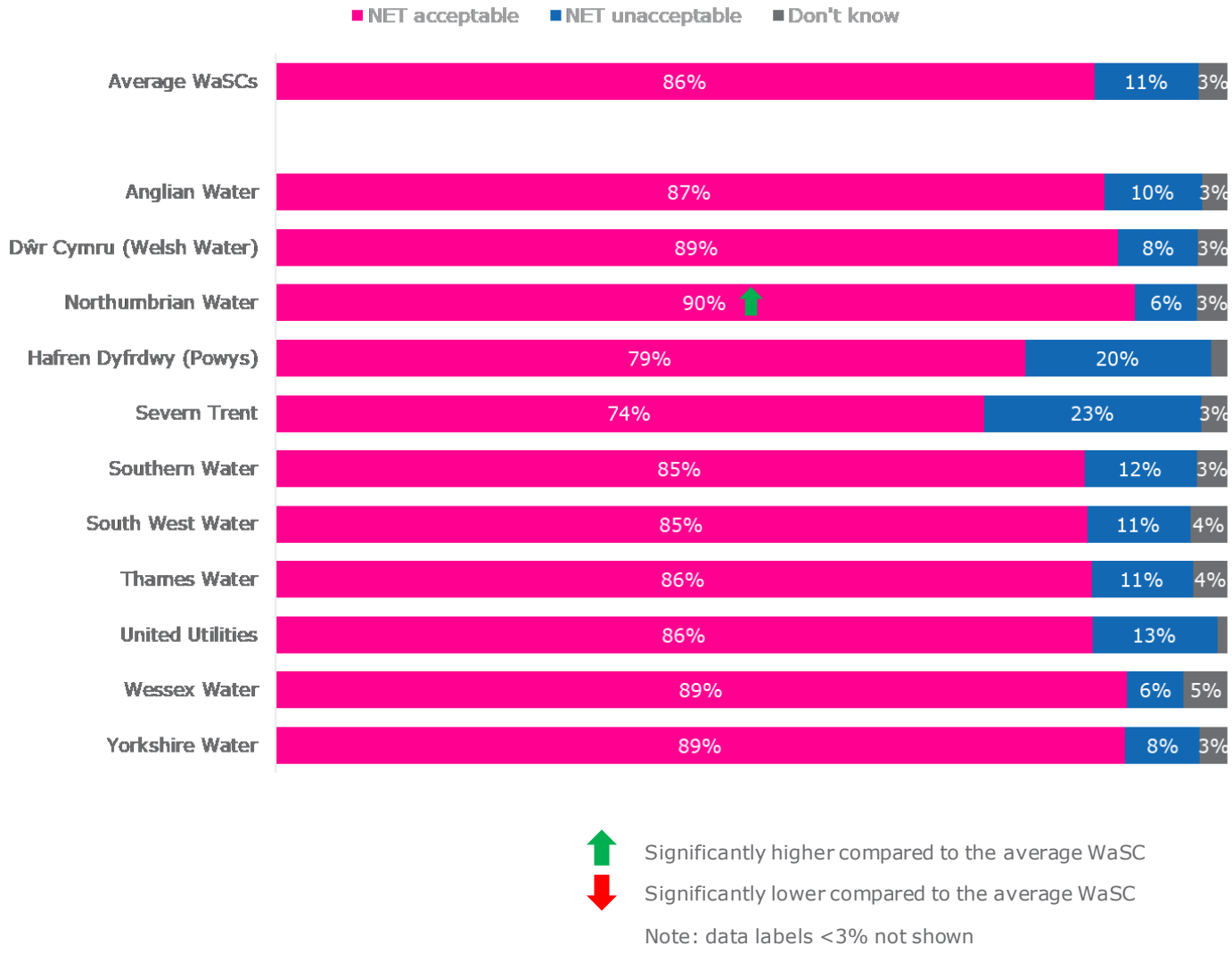


5.2.2 There is no significant difference in uninformed acceptability of yearly changes between customers in England and Wales (both 87% acceptable).

5.3 Uninformed acceptability, total change bill change from 2020 to 2025

5.3.1 The charts below show the acceptability of the total bill change to 2025 for each company.

Figure 16: Uninformed acceptability by WaSCs, total change

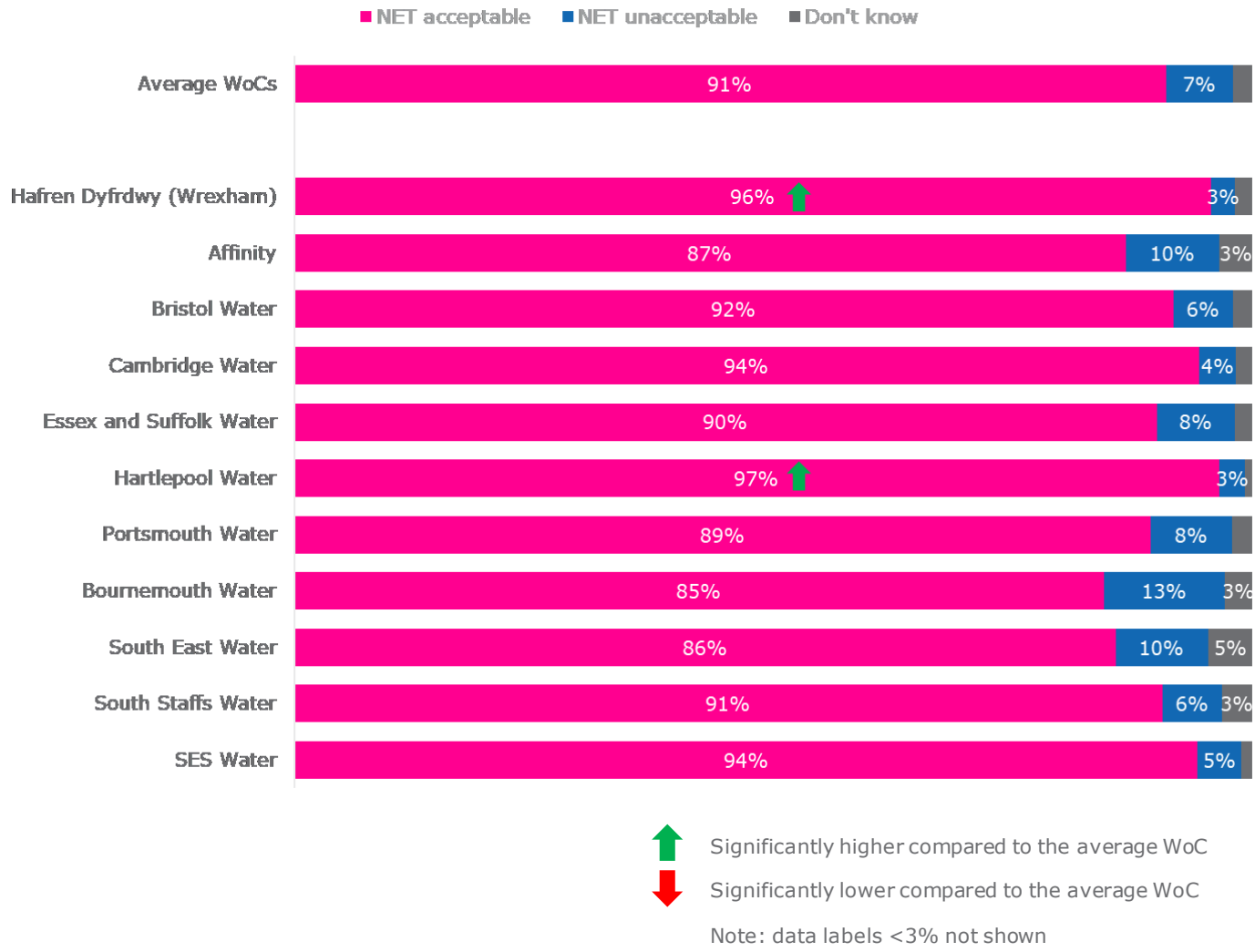


Significantly higher compared to the average WaSC

Significantly lower compared to the average WaSC

Note: data labels <3% not shown

Figure 17: Uninformed acceptability by WoCs, total change



5.3.2 88% of customers in England and 89% of customers in Wales found the total change in bills acceptable at the uninformed level.

5.4 Reasons for finding proposed bills unacceptable

5.4.1 Customers who found any aspect of the uninformed proposals unacceptable were asked why. The main reasons are:

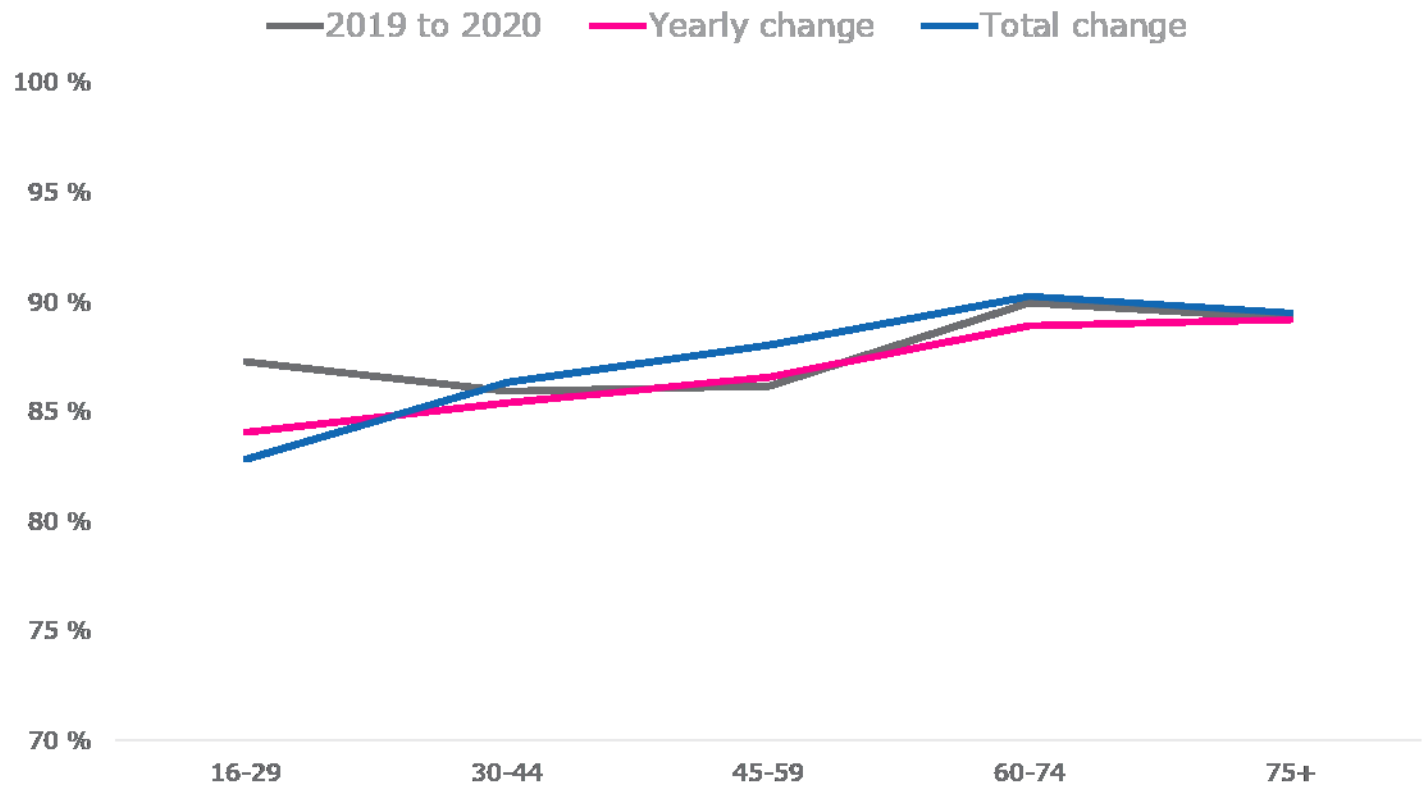
- Bills are too expensive as it is and they will struggle to pay (21%), year on year bill increases are too high / bills are too high and shouldn't be increasing year on year (18%), and that bills should be reducing further (16%)
- Across customers in England and Wales there are no differences in outlook here, with the top 3 reasons all in-line.

5.4.2 Overall, the main issues for customers who found at least one aspect of the uninformed change unacceptable are cost based – and focus on the likelihood of bills being unaffordable now and potentially in the future.

5.5 Uninformed acceptability, demographic differences

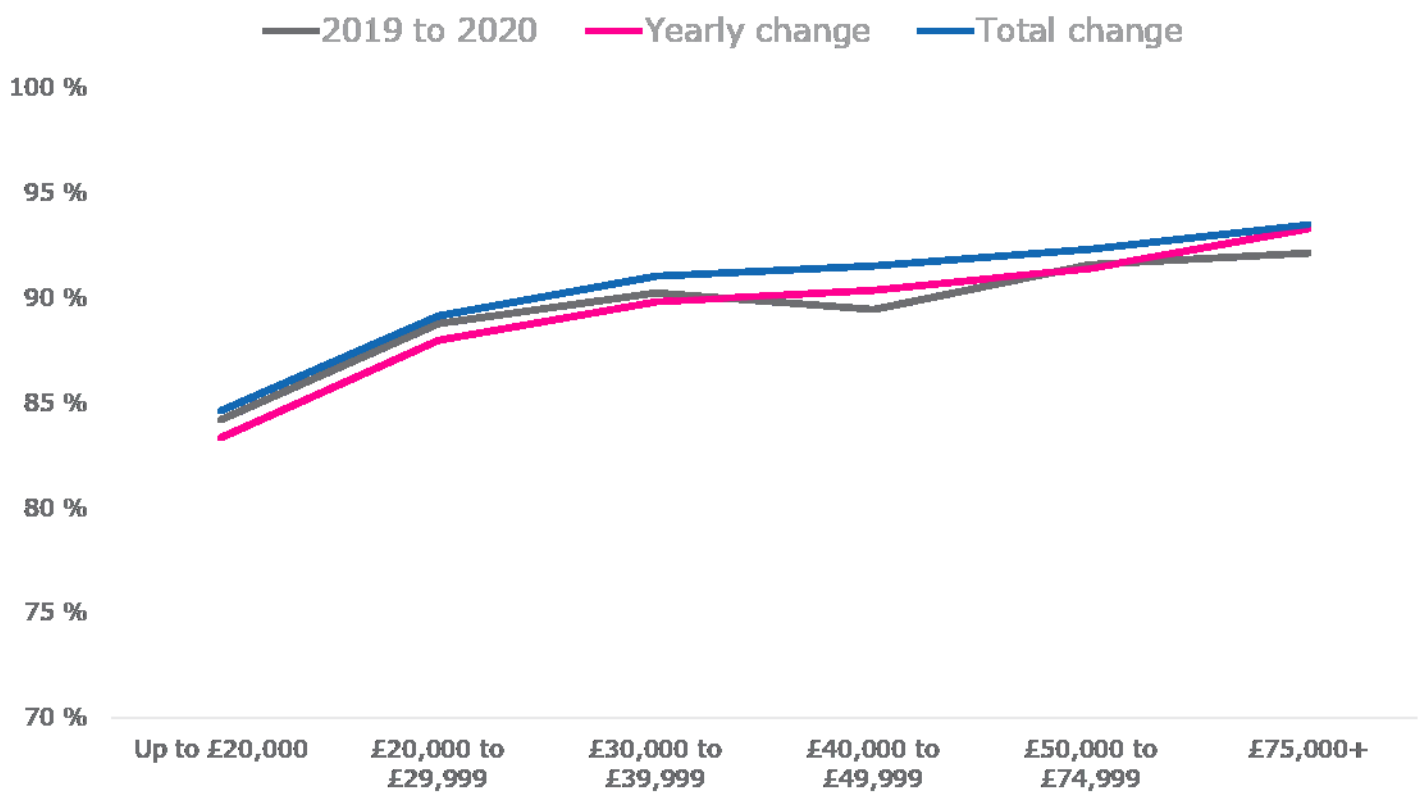
5.5.1 This section looks at demographic differences – across the entire sample – for uninformed acceptability across all three levels (change from 2019 to 2020, yearly changes, and total change).

Figure 18: Uninformed acceptability, all customers, by age



5.5.2 Uninformed acceptability generally increases with age, with customers aged 16-29 being less likely to find the proposed plans acceptable (especially at the yearly change and total change levels) than older customers – especially those aged 60-74 or 75+.

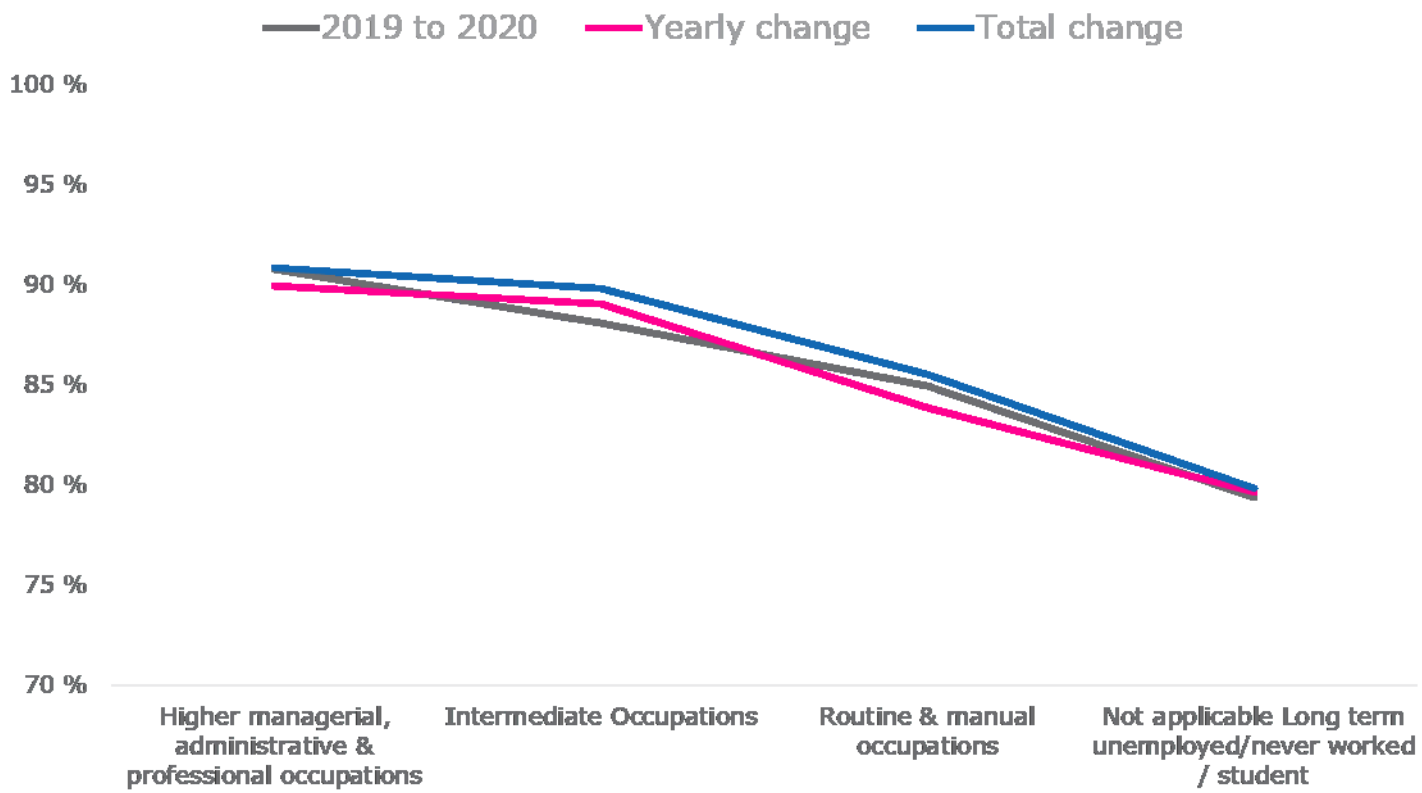
Figure 19: Uninformed acceptability, all customers, by household income



5.5.3 Uninformed acceptability – across all three levels – is lowest among those with an income of up to £20,000 per year.

5.5.4 Those with lower household incomes (up to £20,000 per year and £20,000 - £29,999) are significantly less likely to consider the proposed changes acceptable than those with higher household incomes - which may, in some part, be reflective of a wider concern for bill changes having a significant impact on budgeting.

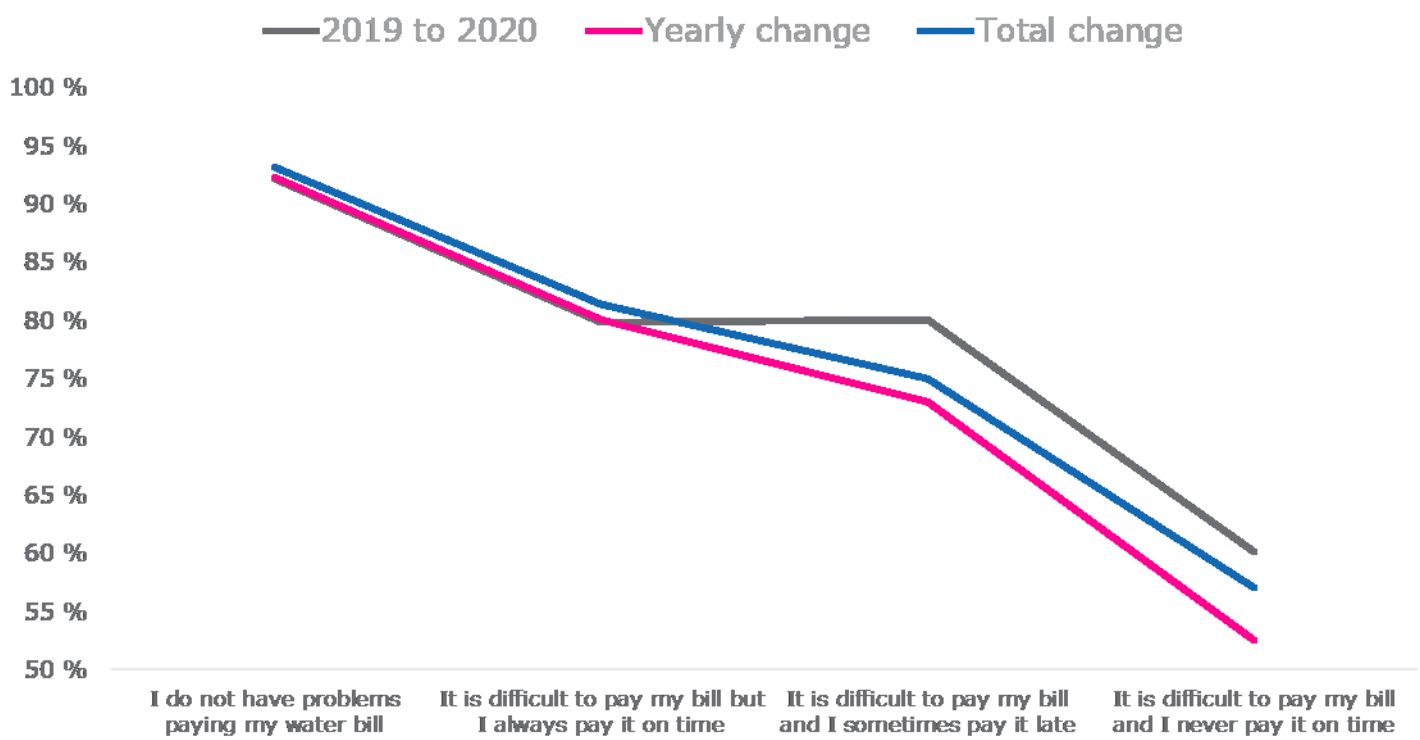
Figure 20: Uninformed acceptability, all customers, by Socio-Economic Classification (SEC) group



5.5.5 As with income, those in higher SEC groups are significantly more likely to find the proposed bill acceptable than those who are in lower groups.

5.5.6 For those in routine and manual occupations, the yearly changes are least acceptable, while for those who are long term unemployed / never worked / students, there is no significant difference in acceptability across the three levels.

Figure 21: Uninformed acceptability, all customers, by financial position



5.5.7 Those who find it difficult to pay their bill to the extent that they never pay it on time, are significantly less likely than all other groups to find the proposed bills acceptable at any level, while those who do not have any problems paying their bill are significantly more likely (with acceptability above 90% for all three measures).

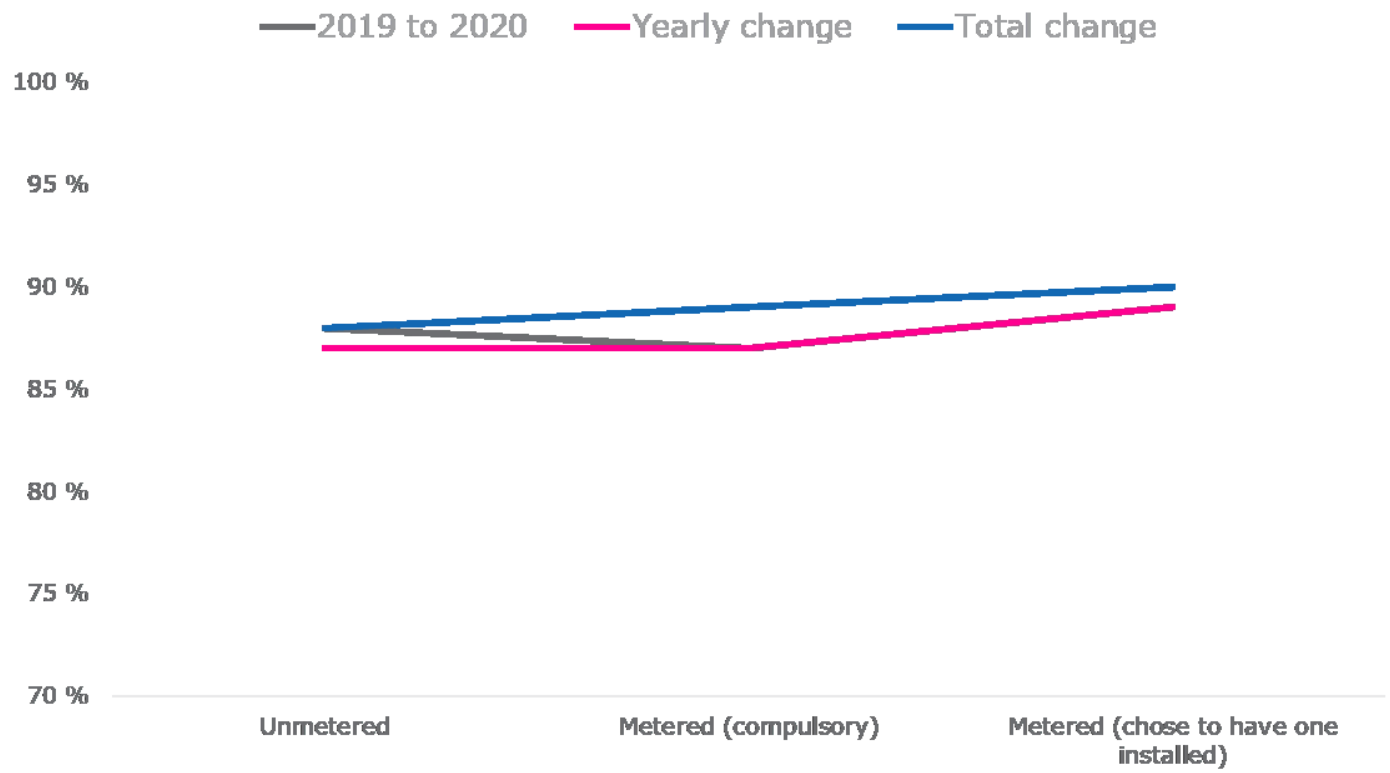
5.5.8 The more difficulty a customer has paying their bills, the bigger the difference in acceptability between the uninformed acceptability levels. Those who find it difficult to pay their bill and sometimes pay it late and those who always pay it late are less likely to find the yearly change proposals acceptable than the other levels (change from 2019 to 2020 and total change) – suggesting that fluctuations in bill amounts for these groups can be difficult to navigate and potentially problematic.

Table 10: Uninformed acceptability, all customers, by people on their company's Priority Services Register

	On company's Priority Services Register (n=971)	Not on company's Priority Services Register (n=9,685)
Uninformed acceptability, 2019/20	84%	88%
Uninformed acceptability, yearly change	84%	88%
Uninformed acceptability, total change	86%	89%

5.5.9 Customers who are on their company's Priority Services Register are significantly less likely to find the proposed bill acceptable across all three uninformed levels than those who are not.

Figure 22: Uninformed acceptability, all customers, by metered status



5.5.10 There is little difference in acceptability between those who are metered and those who are unmetered, however, those who elected to have a meter installed are generally more likely to find the proposed bills acceptable than those who are either unmetered or had no choice in having a meter installed.

Table 11: Uninformed acceptability, all customers, by people in the household with a disability / other condition

	Someone in the household has a disability / other condition (n=3,904)	No one in the household has a disability / other condition (n=6,441)
Uninformed acceptability, 2019/20	86%	89%
Uninformed acceptability, yearly change	84%	90%
Uninformed acceptability, total change	85%	91%

5.5.11 For customers where someone in the household has a disability or other condition, acceptability is significantly lower than for those where no one in the household has a disability / other condition – with a 3% gap at the change from 2019 to 2020, and 6% gaps at the yearly and total change levels.

Table 12: Uninformed acceptability, all customers, by experience of issues with water / sewerage services which affect responses to the survey

	Experienced issues with water / sewerage services which affect responses (n=564)	Not experienced issues with water/ sewerage services which affect responses (n=10,215)
Uninformed acceptability, 2019/20	79%	88%
Uninformed acceptability, yearly change	76%	88%
Uninformed acceptability, total change	79%	89%

5.5.12 Unsurprisingly, customers who have experienced issues with their water and/or sewerage service which affected their responses to the survey are significantly less likely to consider the proposed bill changes acceptable than those who have not.

6. Informed Acceptability

After the uninformed acceptability section, respondents were then asked to rate the acceptability of proposed bills alongside information about their water company's proposals for water service, sewerage service and customer and other services. The information was displayed via a visual showcard to demonstrate the company's current performance (where available) against the proposed service levels in 2025. A selection of common performance commitments (the service level commitments each water company has to set targets for) and bespoke performance commitments (the service commitments individual water companies can make, dependent on the wants and needs of their own customers) were shown. Customers were informed that the details provided were a 'snapshot' of proposals.

Customers of both WaSCs and WoCs were shown:

- Proposed bill changes for water services alongside their water company's performance commitments in this area;
- Proposed bill changes for sewerage services alongside their sewerage company's performance commitments in this area;
- And, proposed total bill changes alongside their water company's customer service and other performance commitments.

At each stage, customers were asked how acceptable they found the proposed bill changes in light of the performance commitment information shown, resulting in a three-stage informed acceptability module within the questionnaire:

- Informed acceptability of water changes
- Informed acceptability of sewerage changes
- Total change informed acceptability.

At this stage of the survey, the questionnaire was structured in the same way for WaSC customers and WoC customers.

The following sections detail informed acceptability across the three question areas outlined above.

6.1 Informed acceptability, water services

6.1.1 The charts below show company level informed acceptability for water services

Figure 23: Informed acceptability, water services, WaSCs

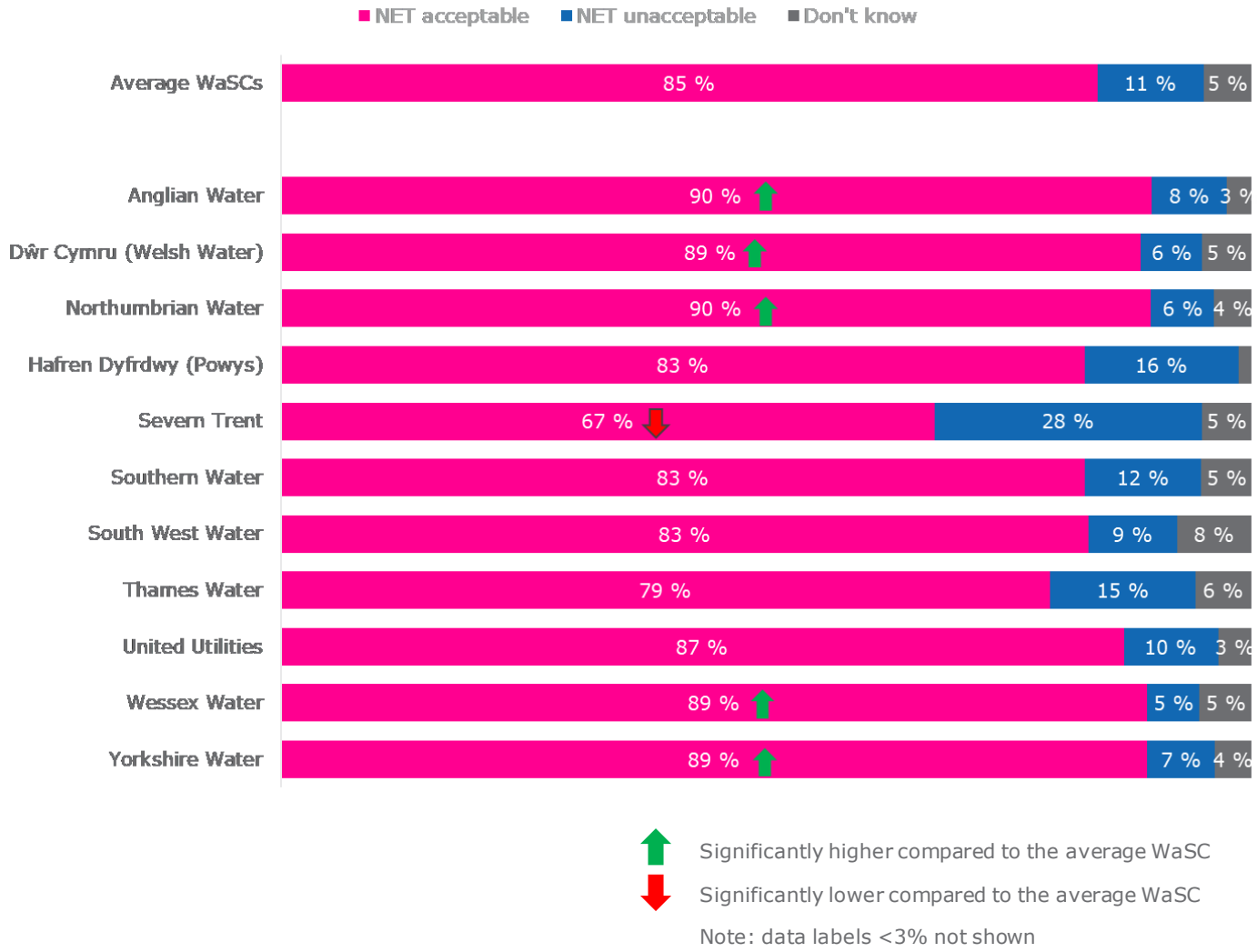
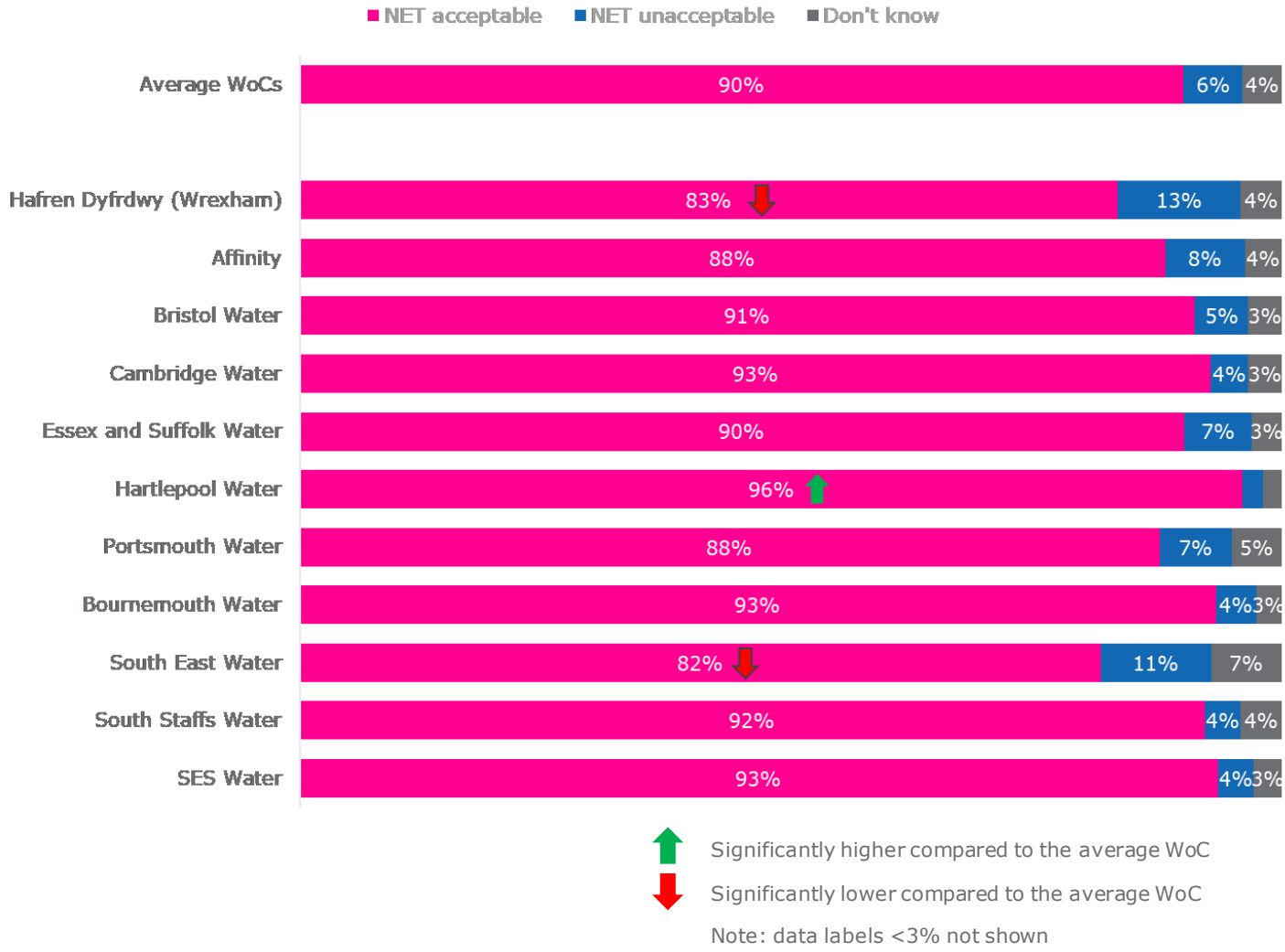


Figure 24: Informed acceptability, water services, WoCs



6.1.2 Customers in England are slightly (but not significantly) more likely to find the proposed bill and associated service levels attached to water services acceptable than customers in Wales (88% cf. 86%).

6.1.3 Only Severn Trent (67% acceptable) fall significantly below CCW's aim of 80% acceptability. Thames Water (at 79%) also falls marginally below this threshold, but not significantly so.

6.1.4 Among WaSC companies, acceptability is highest among customers of Anglian Water (90%) and Northumbrian Water (90%), with Dŵr Cymru, Wessex Water and Yorkshire Water all just below (all 89%). With 67% acceptability, Severn Trent has by far the lowest acceptability among all companies (including WoCs) and is likely driven, in part, by a 1.57% increase in water bills from 2019 to 2020, whilst all other WaSCs are proposing a fall in water bills in this period.

6.1.5 Among WoCs, acceptability is highest for Hartlepool Water (96%) – where water bills are proposed to fall 10.67% from 2019 to 2020 - and only Hafren Dyfrdwy (Wrexham) (83%) and South East Water (82%) record an acceptability figure below 85%.

6.1.6 Depending on their response to the informed acceptability question for water services, customers were asked why they found the proposals acceptable, or unacceptable and were allowed to select up to two reasons. The tables below show the responses to each question.

Table 13: Reason(s) for finding water service proposals acceptable, all customers

Coded reasons for acceptability (acceptable)	Proportion (of all customers) who find the water service proposals acceptable N=9,471
Because of the price decreases	34%
I support what they are trying to do in the long term	29%
The company provides a good service now and it looks as if it will continue	24%
The plan is good value for money	23%
There is little or no change to my bill	22%
Their plans seem to focus on the right services	20%
Compared to energy prices it's cheaper	13%
I don't really understand it but I trust them to do what's best for customers	8%
I have been dissatisfied with the service recently but am pleased that they are making improvements	3%

Table 14: Reason(s) for finding water service proposals unacceptable, all customers

Coded reasons for acceptability (unacceptable)	Proportion (of all customers) who find the water service proposals unacceptable N=924
Already too expensive/it will still be too expensive	32%
Company profits too high	27%
Companies should pay for service improvements out of their profits	25%
Because of the price increases*	19%
I won't be able to afford this	13%
I don't trust them to make these service improvements	13%
I expect better improvements for these prices	13%
The plan is poor value for money	11%
Generally, expect bigger service improvements	6%
I am dissatisfied with current services & expected greater improvements	6%
Compared to energy prices it is more expensive	5%
Their plans don't focus on the right services	2%

*Note: customers who found the proposed bills unacceptable were able to select 'because of the price increases' to account for opposition to year on year price increases from 2020

6.2 Informed acceptability, sewerage services

6.2.1 The charts below show company level informed acceptability for sewerage services

Figure 25: Informed acceptability, sewerage services, WaSCs

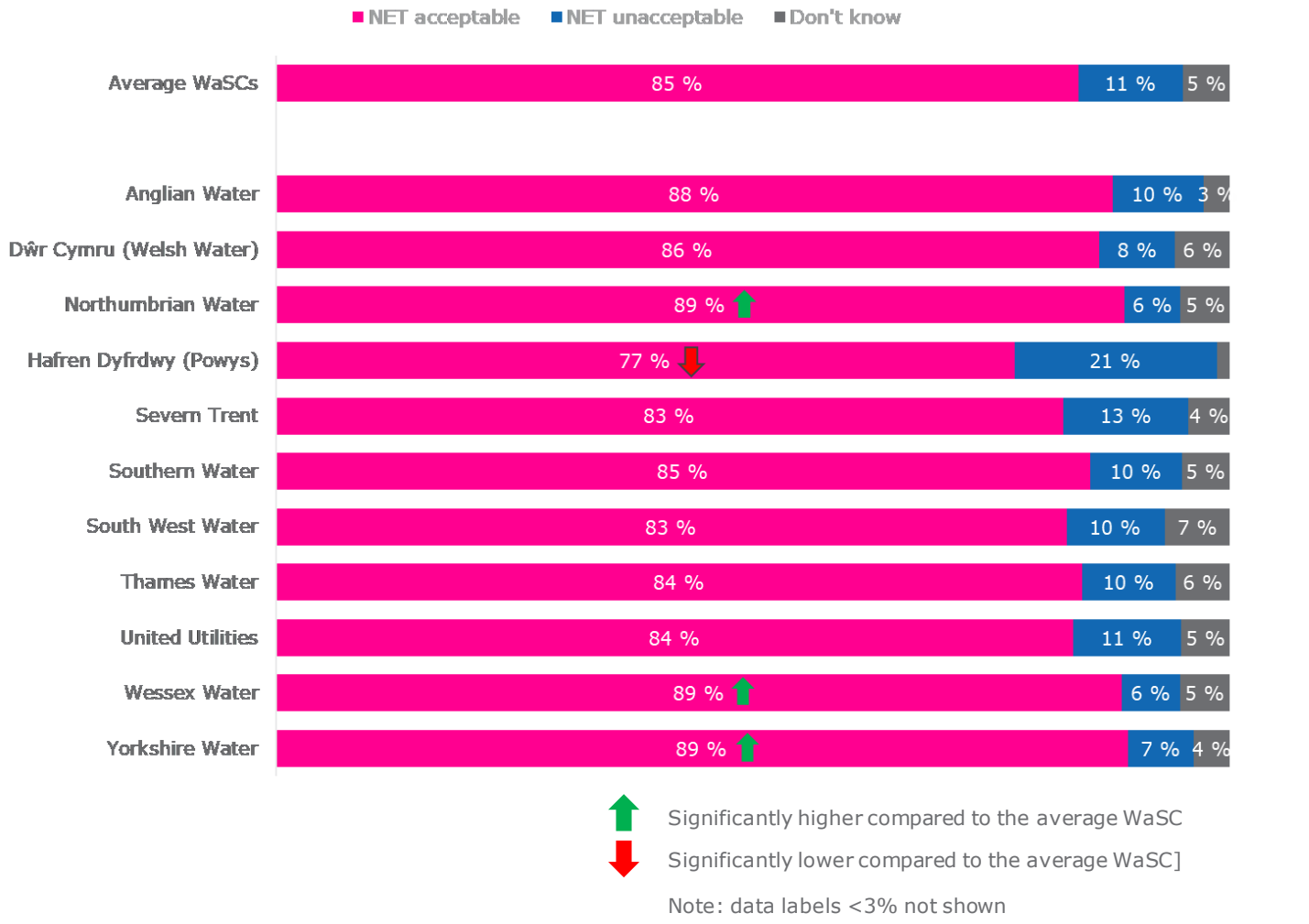
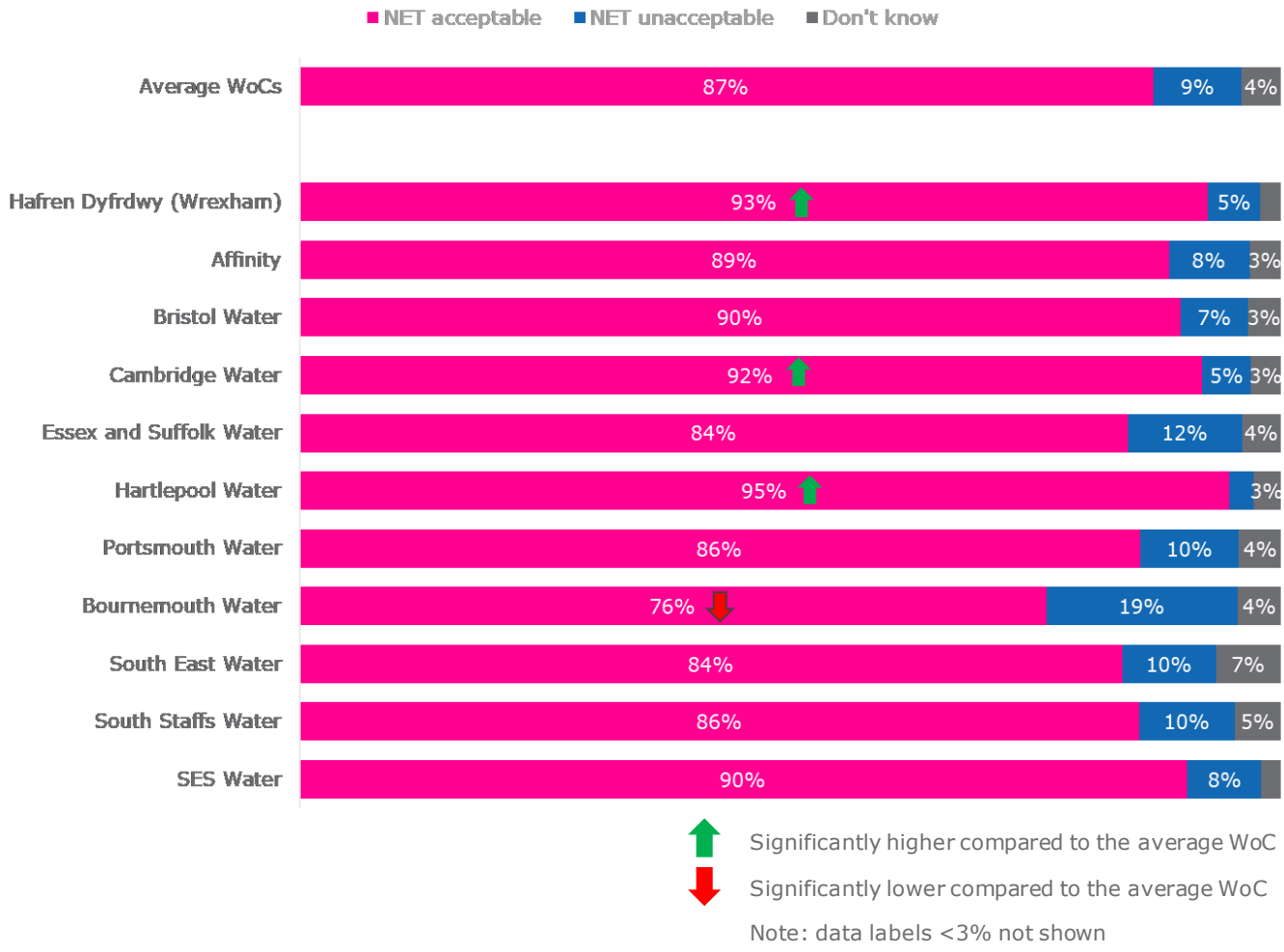


Figure 26: Informed acceptability, sewerage services, WoCs



6.2.2 There is no difference in acceptability of the proposed sewerage bills and associated services between customers in England and Wales (both 86% acceptable).

6.2.3 Overall, informed acceptability of sewerage services is slightly higher among WoCs (87%) than WaSCs (85%).

6.2.4 Customers were asked why they found the proposals acceptable, or unacceptable and to select up to two reasons for this. The tables below show the responses to each question.

Table 15: Reason(s) for finding sewerage service proposals acceptable, all customers

Coded reasons for acceptability (acceptable)	Proportion (of all customers) who find the sewerage service proposals acceptable N=9,388
Because of the price decreases	33%
I support what they are trying to do in the long term	30%
Their plans seem to focus on the right services	26%
The plan is good value for money	24%
There is little or no change to my bill	21%
The company provides a good service now and it looks as if it will continue	20%
Compared to energy prices it's cheaper	11%
I don't really understand it but I trust them to do what's best for customers	8%
I have been dissatisfied with the service recently but am pleased that they are making improvements	3%

Table 16: Reason(s) for finding sewerage service proposals unacceptable, all customers

Coded reasons for acceptability (unacceptable)	Proportion (of all customers) who find the sewerage service proposals unacceptable N=1,002
Already too expensive/it will still be too expensive	35%
Company profits too high	23%
Because of the price increases*	19%
I expect better improvements for these prices	16%
The plan is poor value for money	13%
I won't be able to afford this	11%
Generally, expect bigger service improvements	13%
I don't trust them to make these service improvements	12%
The company should be investing in their services as well as customers	12%
I am dissatisfied with current services & expected greater improvements	8%
Compared to energy prices it is more expensive	4%
Their plans don't focus on the right services	3%

*Note: customers who found the proposed bills unacceptable were able to select 'because of the price increases' to account for opposition to year on year price increases from 2020

6.3 Informed acceptability, customer and other services

6.3.1 The charts below show company level informed acceptability of the combined bill and based on information about water, sewerage and customer and other services.

Figure 27: Informed acceptability, total package, WaSCs

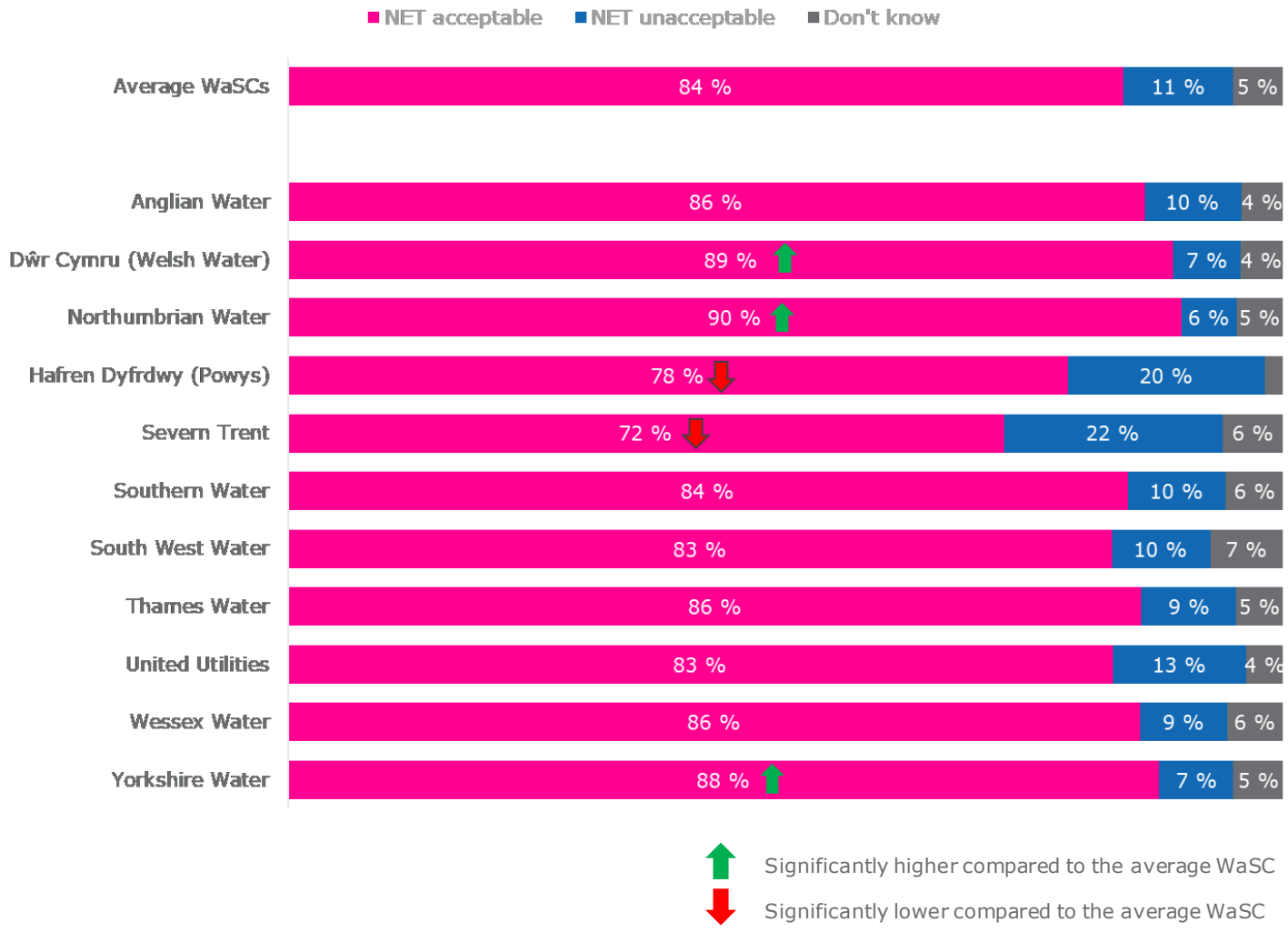
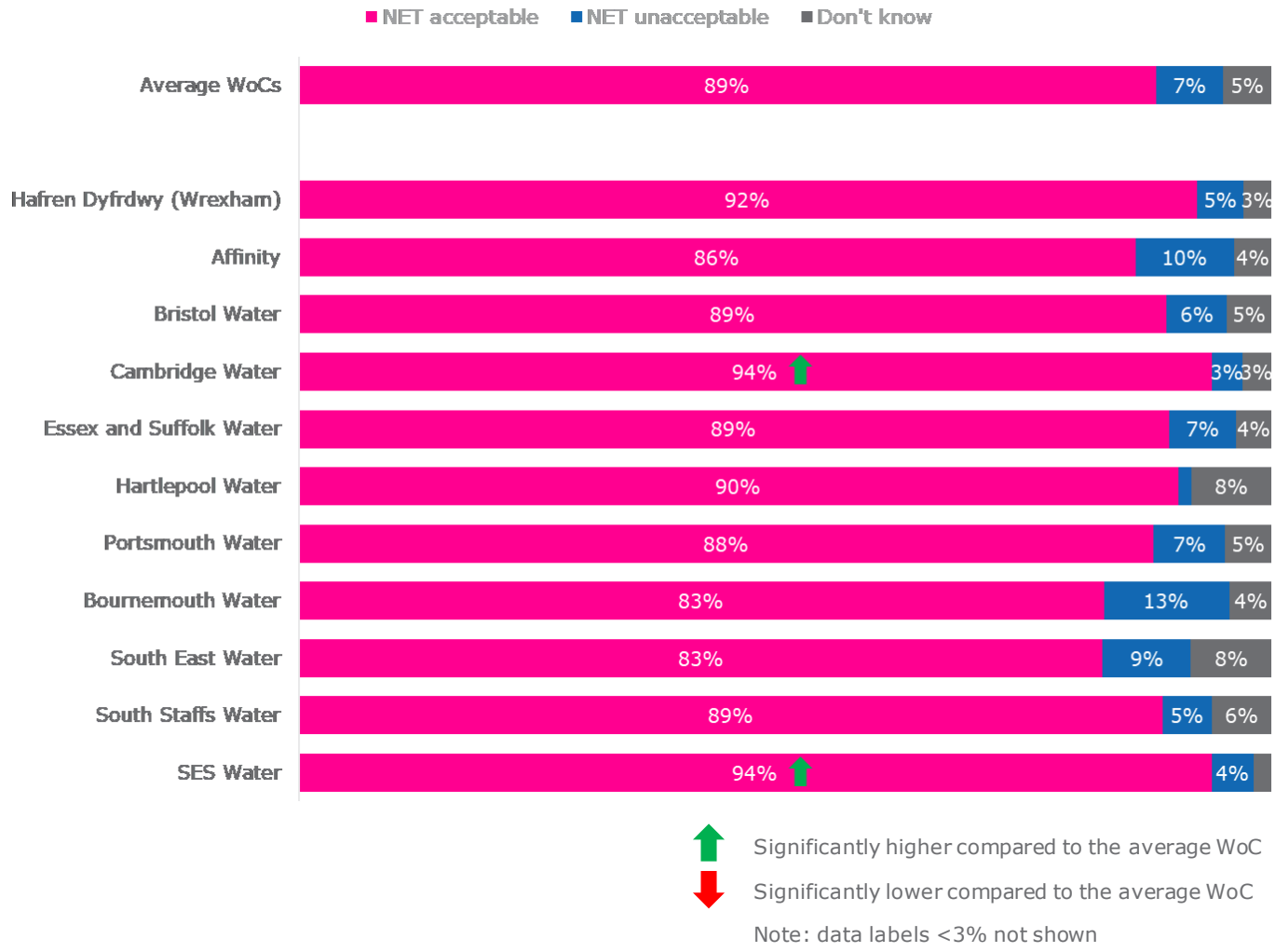


Figure 28: Informed acceptability, total package, WoCs



6.3.2 Customers in Wales are slightly (but not significantly) more likely to find the total package acceptable than customers in England (86% cf. 88%).

6.3.3 Depending on their response to the informed acceptability question for combined (water and sewerage) services, customers were asked why they found the proposals acceptable, or unacceptable and selected up to two reasons. The tables below show the responses to each question.

Table 17: Reason(s) for finding combined service proposals acceptable, all customers

Coded reasons for acceptability (acceptable)	Proportion (of all customers) who find the combined service proposals acceptable N=9,403
I support what they are trying to do in the long term	33%
Their plans seem to focus on the right services	30%
The plan is good value for money	31%
There is little or no change to my bill	27%
The company provides a good service now and it looks as if it will continue	24%
Compared to energy prices it's cheaper	14%
I don't really understand it but I trust them to do what's best for customers	9%
I have been dissatisfied with the service recently but am pleased that they are making improvements	3%

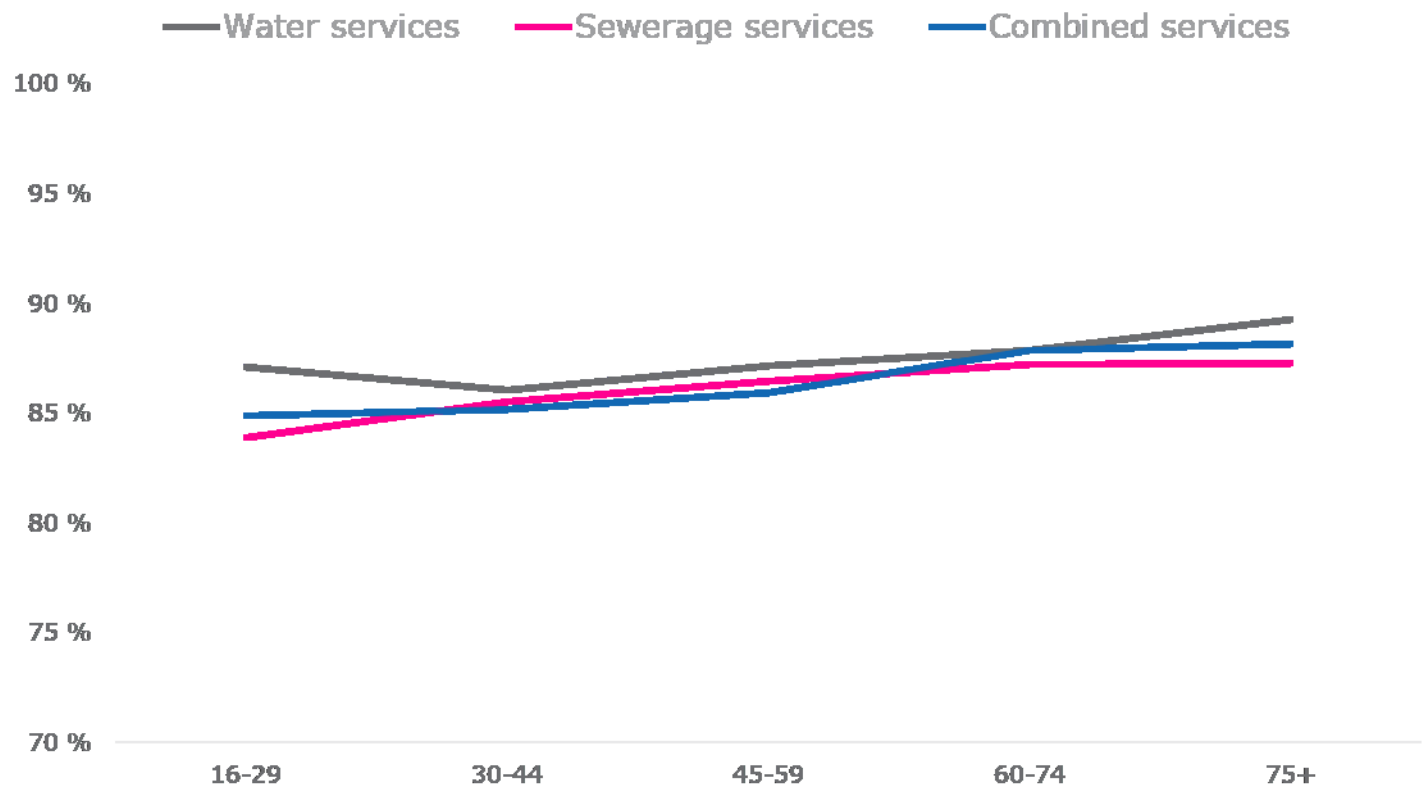
Table 18: Reason(s) for finding combined service proposals unacceptable, WaSCs

Coded reasons for acceptability (unacceptable)	Proportion (of all customers) who find the combined service proposals unacceptable N=935
Already too expensive/it will still be too expensive	46%
Company profits too high already	38%
I expect better improvements for these prices	21%
The plan is poor value for money	17%
The company should be investing in their services as well as customers	15%
Generally, expect bigger service improvements	10%
I am dissatisfied with current services & expected greater improvements	9%
Compared to energy prices it is more expensive	9%

6.4 Informed acceptability, demographic differences

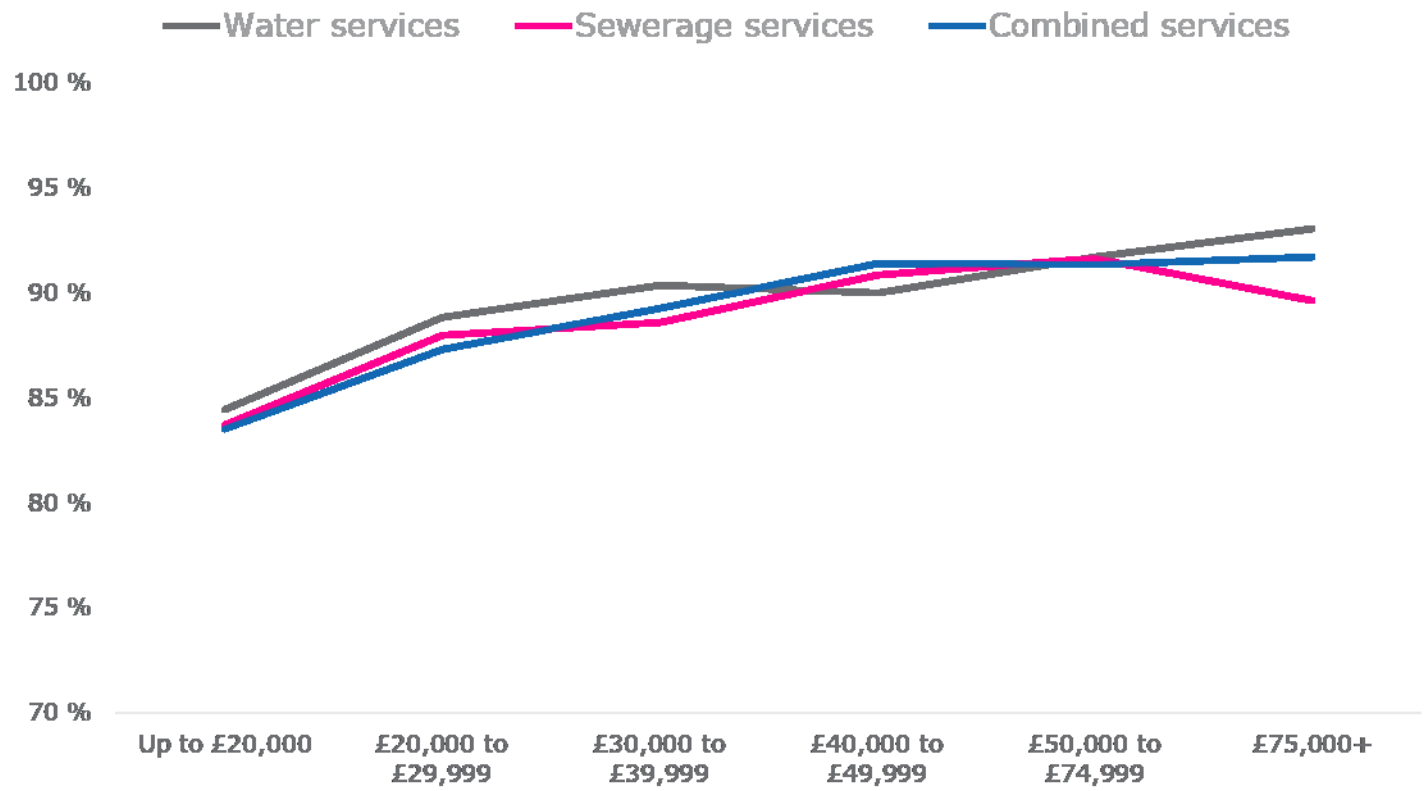
6.4.1 This section looks at demographic differences – across the entire sample – for informed acceptability across all three levels (water services, sewerage services, and customer and other services).

Figure 37: Informed acceptability, all customers, by age



6.4.2 Acceptability generally increases with age, with those aged 75+ being significantly more likely than other age groups to find the proposed bills and plans acceptable. When looking at sewerage services and combined services, acceptability is lowest among those aged 16-24, but when looking at water services, it is lowest among those aged 30-44.

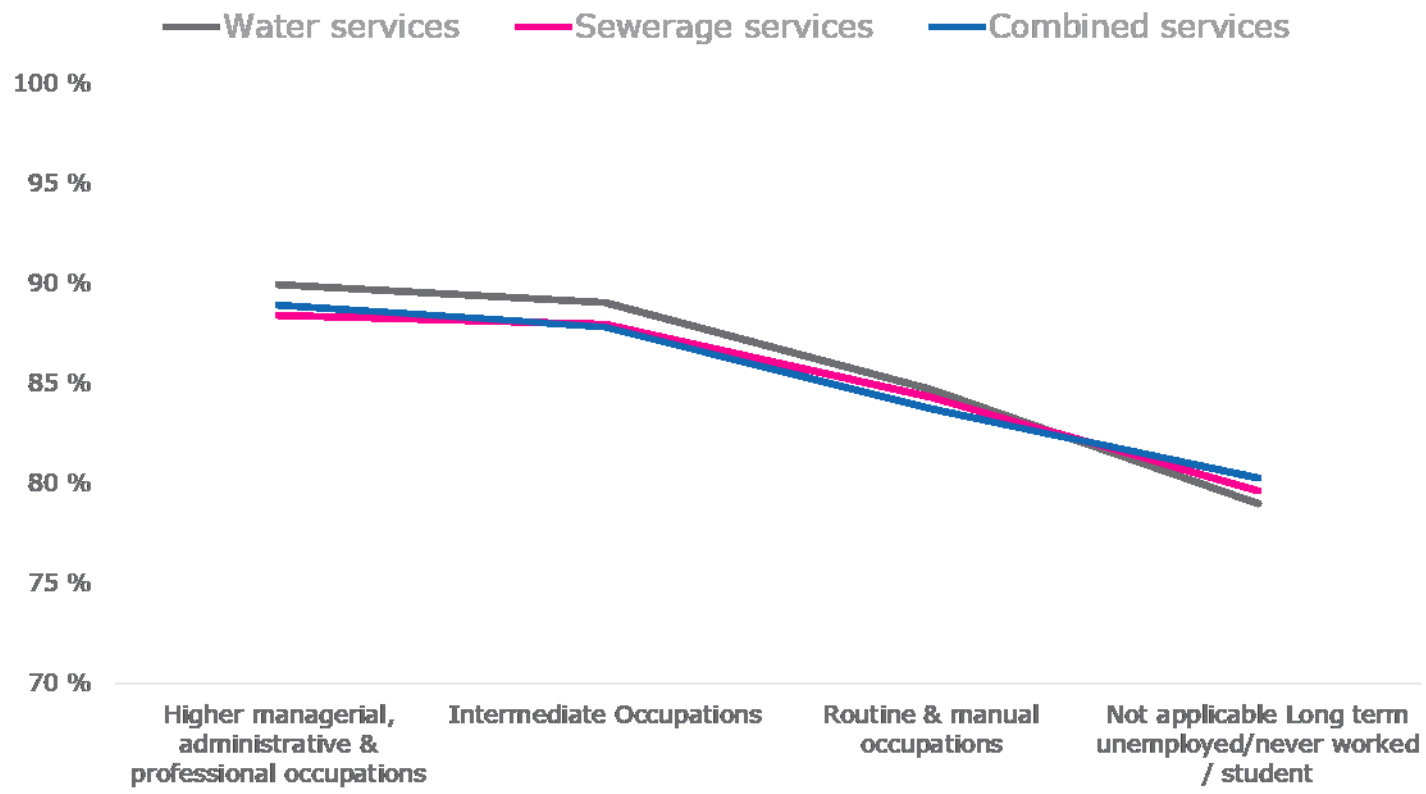
Figure 29: Informed acceptability, all customers, by household income



6.4.3 Informed acceptability for water services, sewerage services and combined services is significantly lower among customers with a household income of up to £20,000 than any other group.

6.4.4 Those who find the combined bill unacceptable and who have a household income of up to £20,000 are more than twice as likely to say that the bill is already too expensive (52%) than those who have an income of £75,000+ (21%). Among those who have a household income of £75,000+ and find the combined bill unacceptable, the bigger concern is company profits being too high (44%).

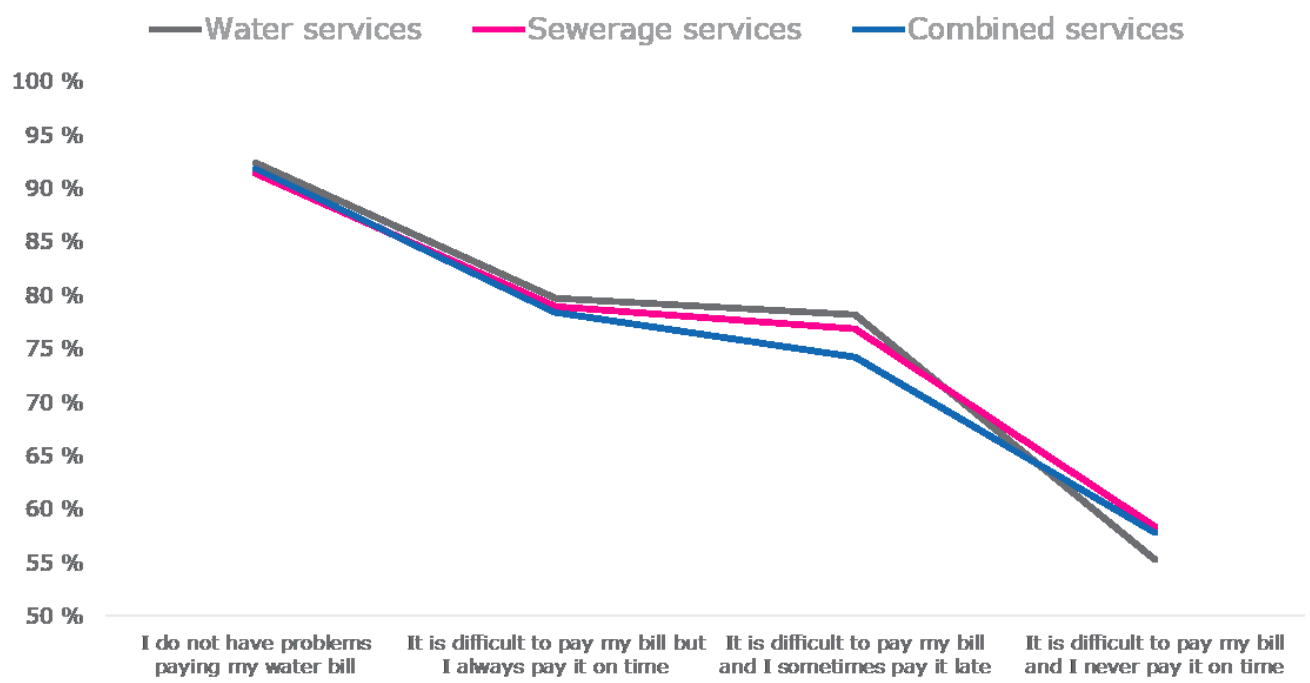
Figure 30: Informed acceptability, all customers, by Socio-Economic Classification (SEC) group



6.4.5 Informed acceptability for water services, sewerage services and combined services falls (significantly) in-line with socio-economic classification group – with those who are long term unemployed / never worked / students being least likely to find the proposed bills and associated service levels acceptable.

6.4.6 As with household income, those in lower socio-economic classification groups are significantly more likely to cite bills already being too expensive and that they will continue to be too expensive as a key reason for finding the proposals unacceptable. 54% of those in routine / manual occupations and 49% of those who are long term unemployed / never worked / students compared to 39% of those in higher managerial, administrative and professional occupations.

Figure 31: Informed acceptability, all customers, by financial position



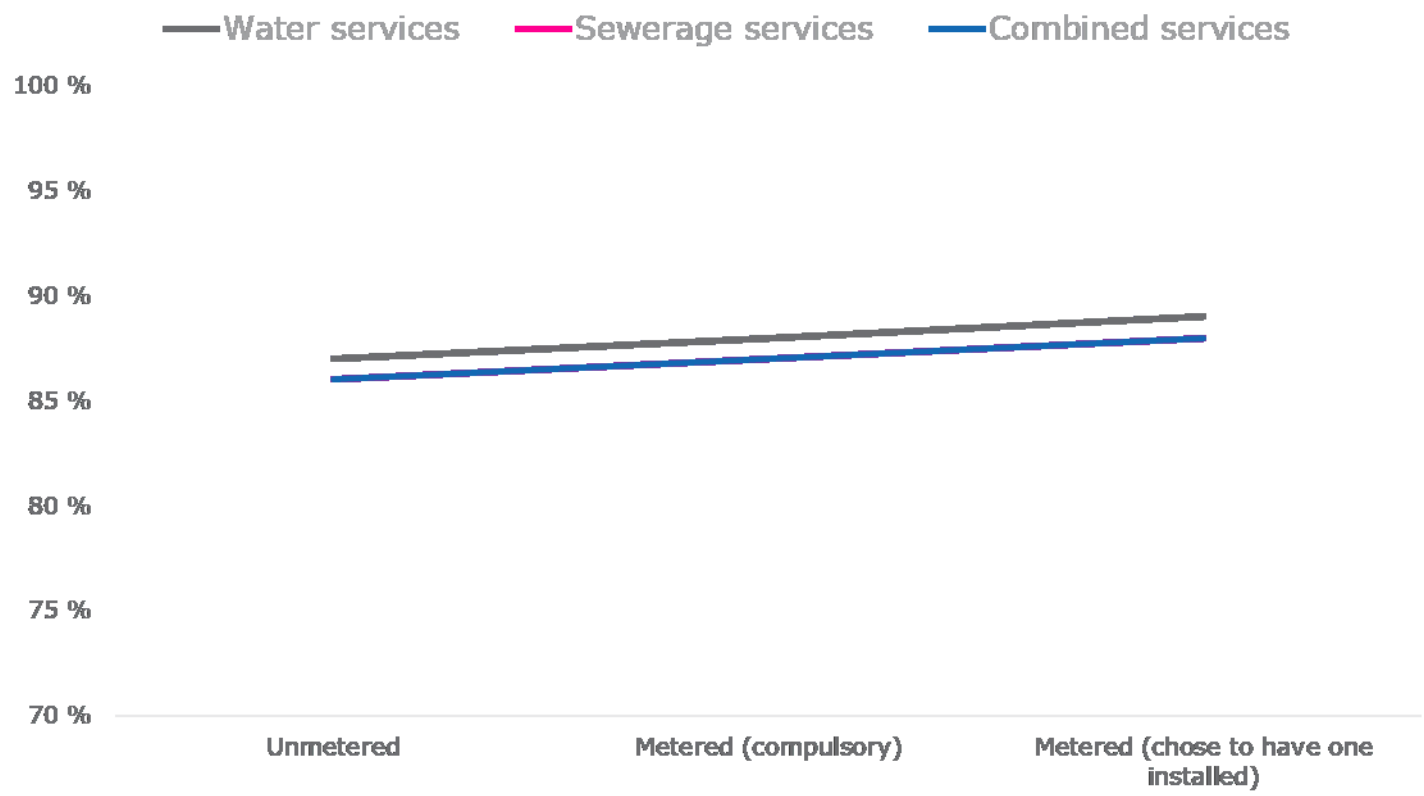
6.4.7 As with both income and socio-economic group, when looking at customers' (stated) financial position in relation to their water and sewerage bills, those at the lower end (who have difficulty paying their bills) are significantly less likely to find the proposed bills and associated services acceptable.

Table 19: Informed acceptability, all customers, by people on their company's Priority Services Register

	On company's Priority Services Register (n=971)	Not on company's Priority Services Register (n=9,685)
Water services	85%	88%
Sewerage services	84%	87%
Combined services	84%	87%

6.4.8 Those on their company's Priority Services Register are marginally (but not significantly) less likely to find the proposed plans acceptable than those who are not – with a three-percentage point difference in acceptability across all three measures.

Figure 32: Informed acceptability, all customers, by metered status



*Note: sewerage service data is the same as combined services data – as such, the sewerage services line is hidden.

6.4.9 Those who chose to have a meter installed are significantly more likely to find the proposals acceptable than those who are unmetered.

Table 20: Informed acceptability, all customers, by people in the household with a disability / other condition which creates a vulnerability

	Someone in the household has a disability / other condition (n=3,904)	No one in the household has a disability / other condition (n=6,441)
Water services	85%	89%
Sewerage services	84%	89%
Combined services	84%	89%

6.4.10 Customers where either they or someone else in the household has a disability or other condition are significantly less likely to find the proposals acceptable than households where no one has a disability / other condition. This is likely to be driven in part by financial circumstance, with those who have someone in the household with a disability / other condition being almost twice as likely to have an income of up to £20,000 (37%) than those who do not have someone in the household with a disability / other condition (20%).

Table 21: Informed acceptability, all customers, by experience of issues with water / sewerage services which affect responses to the survey

	On company's Priority Services Register (n=971)	Not on company's Priority Services Register (n=9,685)
Water services	85%	88%
Sewerage services	84%	87%
Combined services	84%	87%

6.4.11 Customers who have experienced issues with their water or sewerage services, and who say this affected their response to the survey, are significantly less likely to find the proposals acceptable at the informed level than those who have not experienced issues.

7. Acceptability of ODIs

After the informed acceptability section, respondents were introduced to the concept of Outcome Delivery Incentives[14] (ODIs) through an explanation of the rationale for the process alongside information about the (potential) upper and lower limits of ODI variations in relation to their own bill. The explanation included detail about the likelihood of bills falling somewhere in the middle of this range – given that companies are unlikely to either significantly exceed or fall below most or all of their service targets. Based on the information provided, customers were asked to rate the acceptability, in principle, of the potential range of ODIs on their bills where service targets are exceeded or not met by a significant margin. For WaSC customers a single question was asked about the overall acceptability with information about the upper and lower bill levels, while WoC customers were asked two questions – one about the acceptability of ODIs attached to their water bill (and the upper and lower limits included) and one about their sewerage bill (again with the upper and lower limits included). The information was displayed alongside a visual showcard to explain the ODI mechanism (shown in appendix 3).

7.1 Acceptability of ODIs, WaSCs vs. WoCs

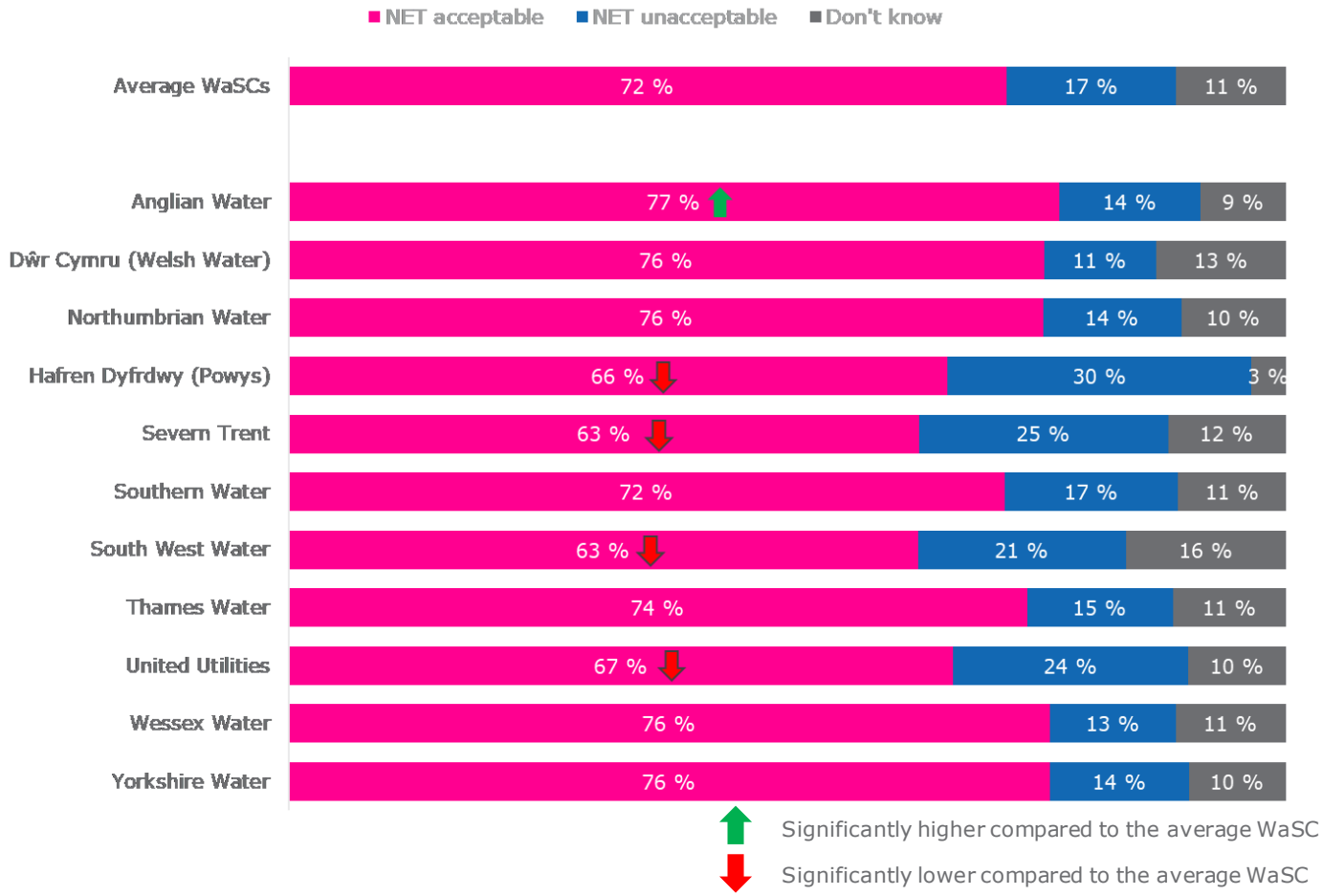
The following sections detail acceptability of ODIs with data split across WaSC and WoC companies.

Acceptability of ODIs[15] is 76% across England and Wales combined, with customers in England significantly more likely to find this acceptable than customers in Wales (76% cf. 68%).

[14] ODIs were introduced by Ofwat with the intention of driving companies to achieve their Performance Commitments for customers. ODIs allow companies to earn a financial reward, through increased revenue by increasing customers' bills, if they meet or exceed their performance targets over a 12-month period. Companies may also have a reduction in revenue (i.e. customer bill reduction) if they fail achieve their targets.

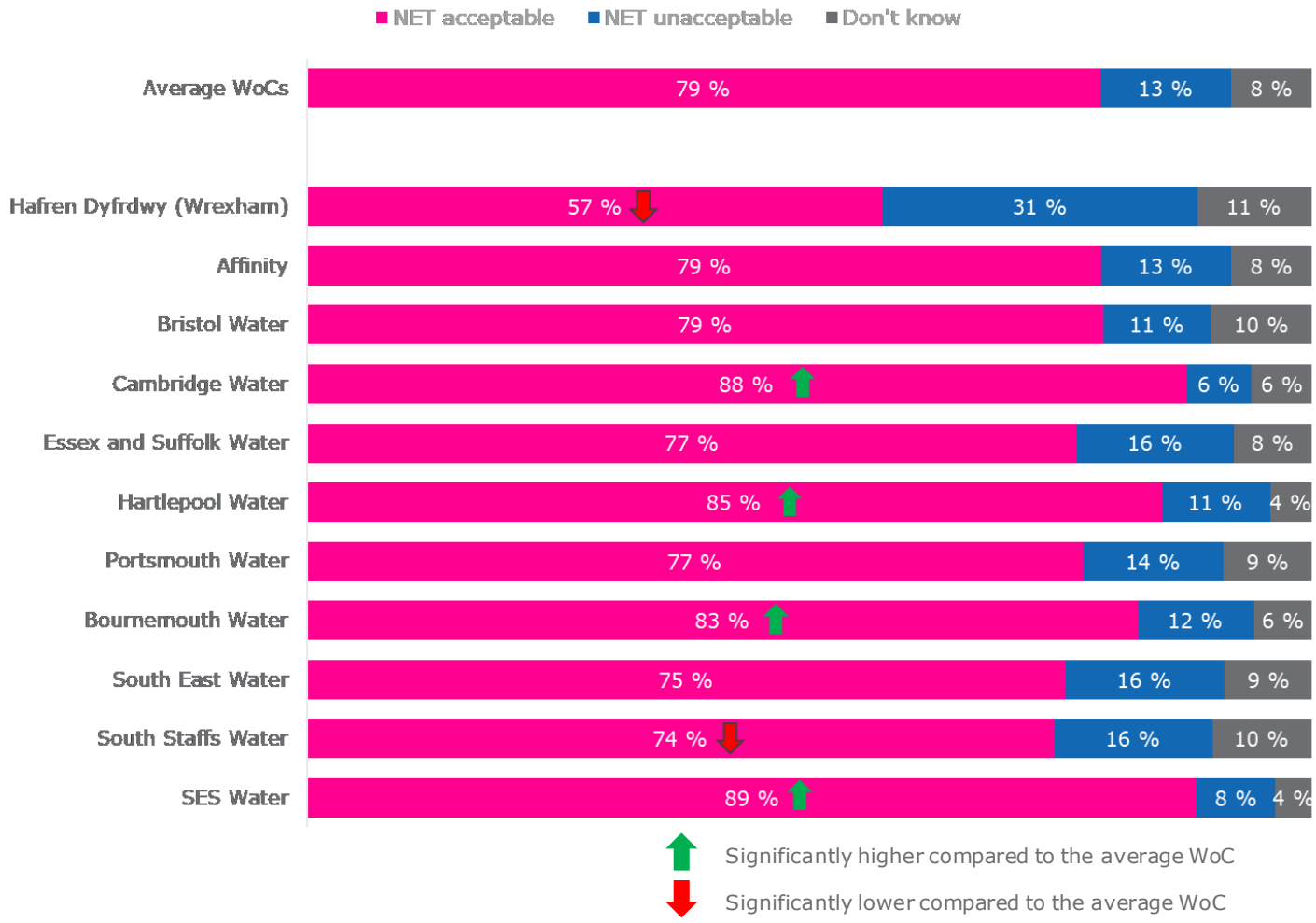
[15] Acceptability of ODIs asked of water and sewerage services combined for WaSCs, and for water and sewerage separately for WoCs. The combined ODI acceptability score comprises of the overall score for WaSCs and the water services acceptability for WoCs

Figure 33: ODI acceptability, WaSCs



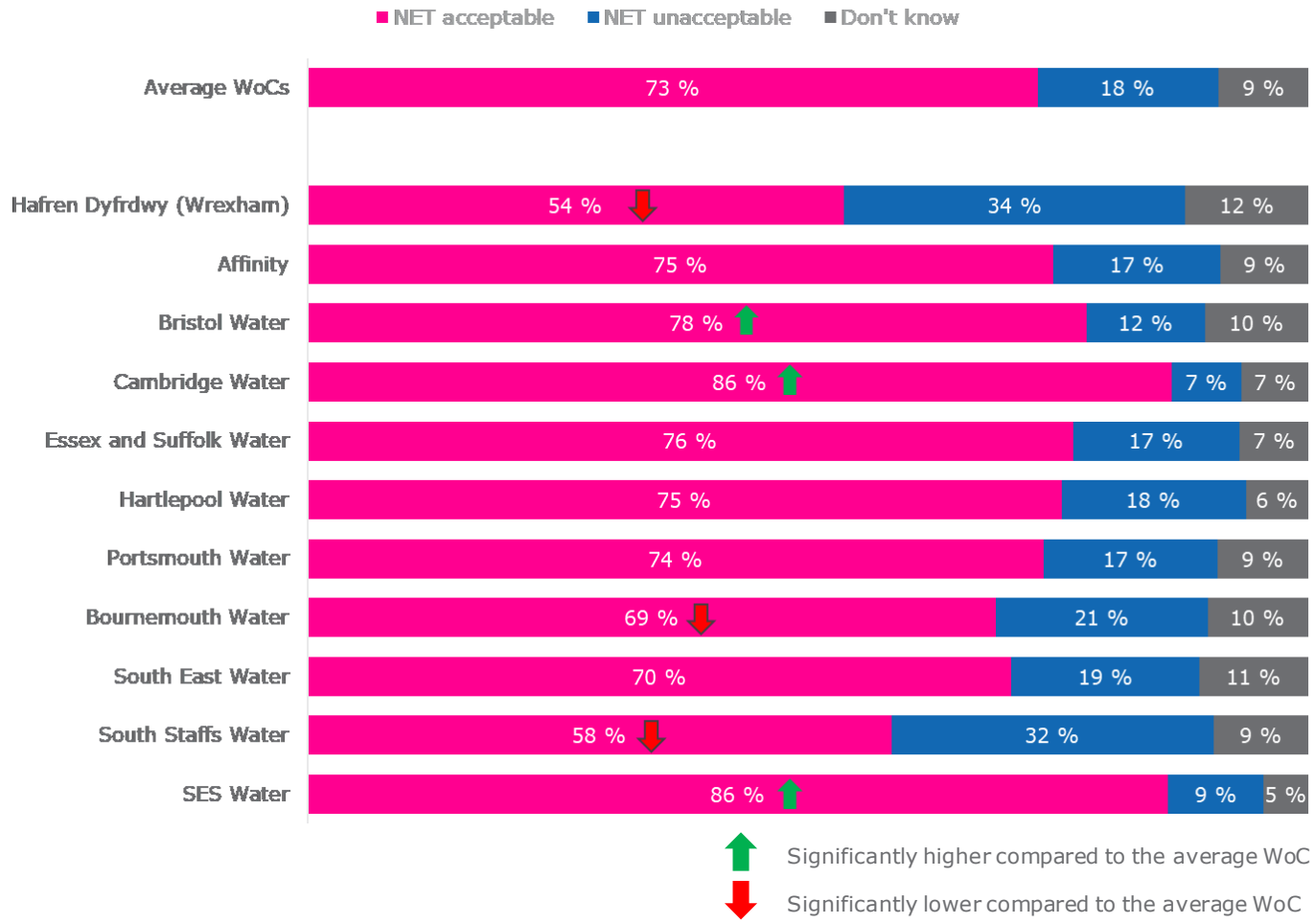
7.1.1 There is significant variation across different WaSCs, with a number (Hafren Dyfrdwy Powys, Severn Trent, South West Water, and United Utilities) recording an acceptability figure below 70%.

Figure 34: ODI acceptability, WoCs, Water



7.1.2 ODI acceptability among WoC customers for water services is 79% overall – although there is significant variation across different companies, ranging from 74% for South Staffs Water to 89% among SES Water customers.

Figure 35: ODI acceptability, WoCs, sewerage

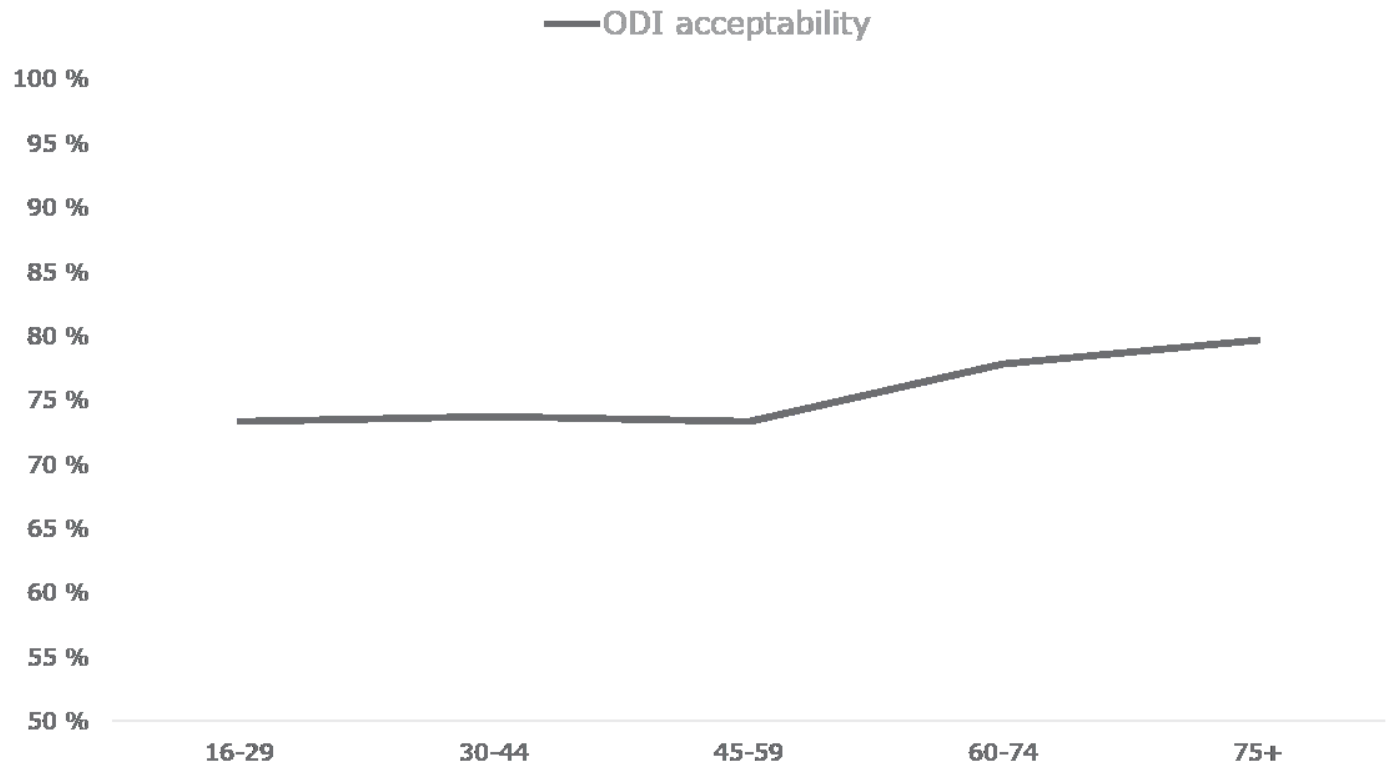


7.1.3 ODI acceptability among WoC customers for sewerage services is significantly lower than for water (73% cf. 79%). As with ODI acceptability for water there is significant variation across different companies, with acceptability ranging from 58% among South Staffs Water customers to 86% among Cambridge Water and SES Water customers.

7.2 Acceptability of ODIs by demographics

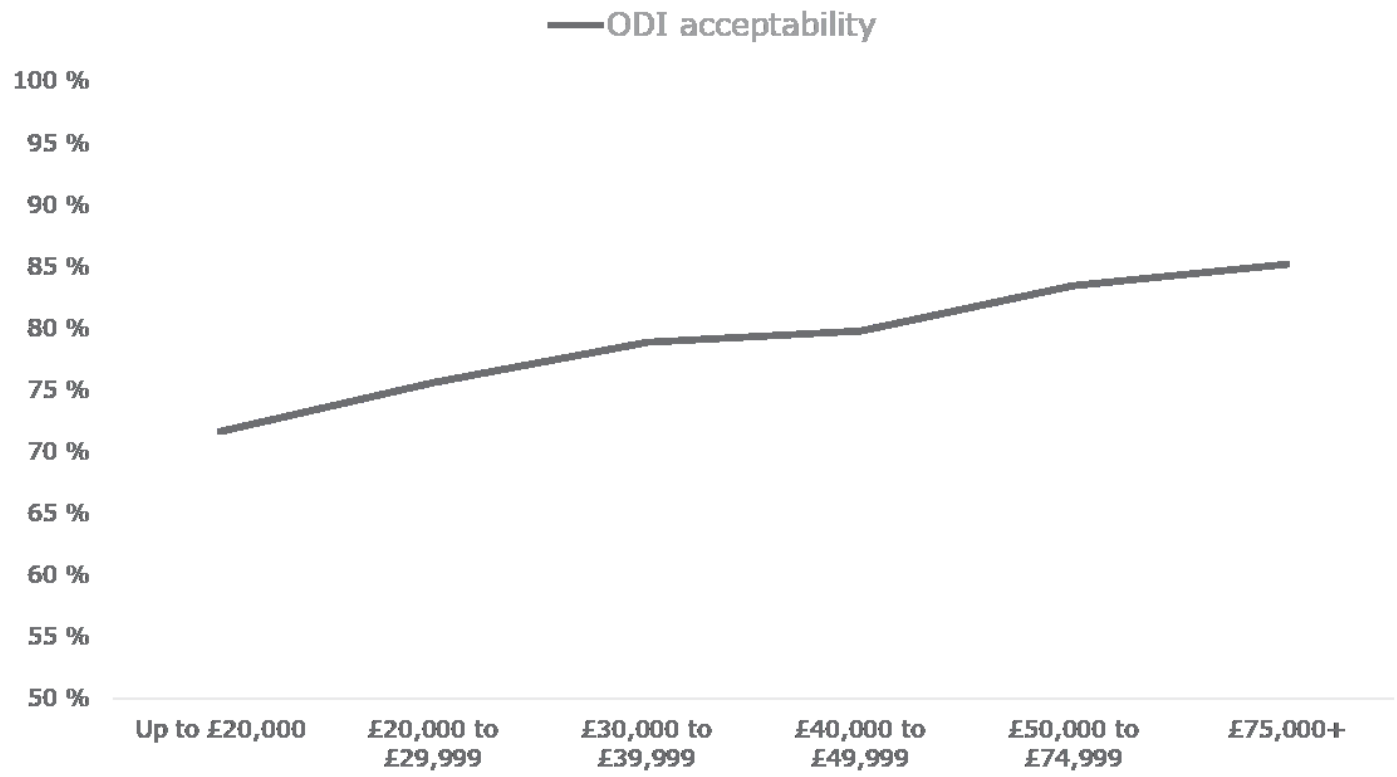
7.2.1 The following section details the acceptability of ODIs by demographics across the entire sample. In order to get a 'total sample' understanding of ODI acceptability, the water services ODI acceptability question for WoC customers is combined with the overall ODI acceptability question for WaSC customers.

Figure 36: Acceptability of ODIs, all customers, by age



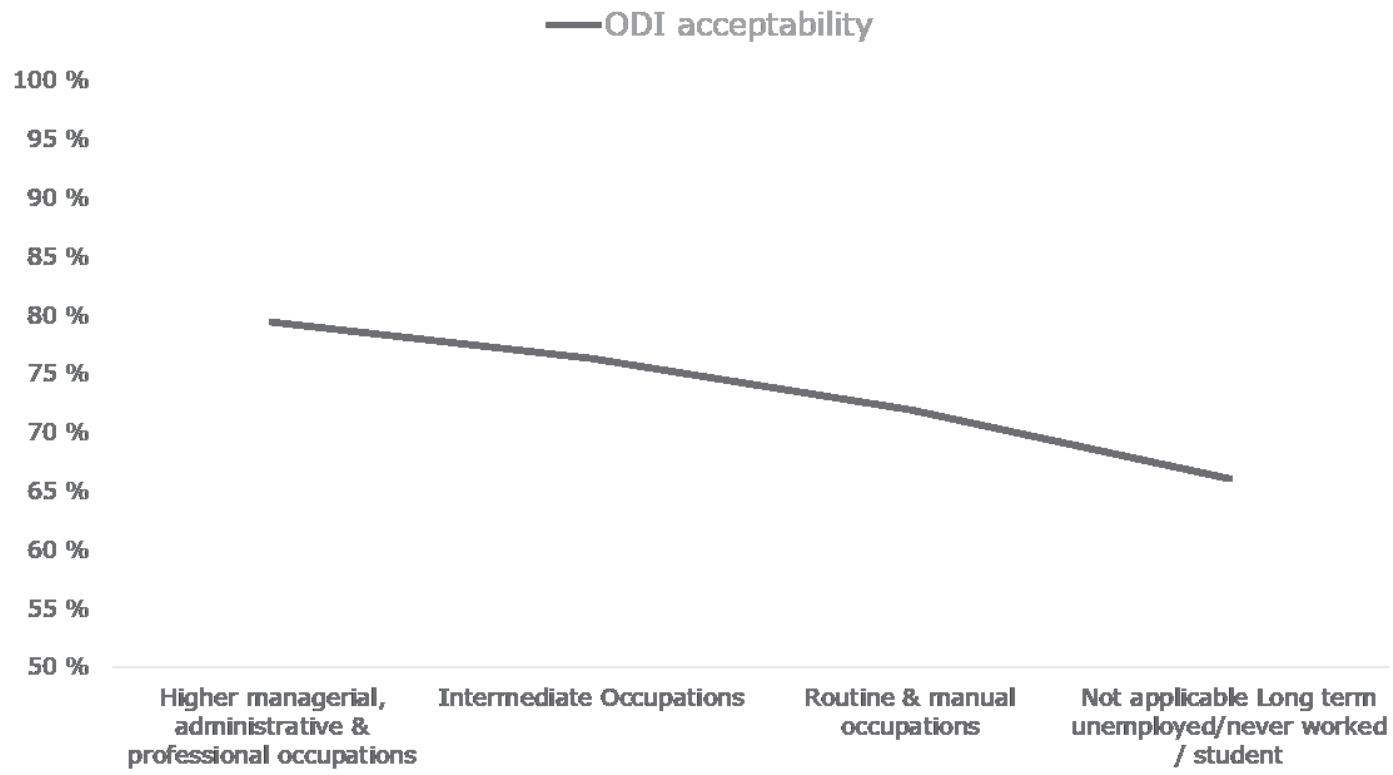
7.2.2 Acceptability of ODIs is relatively consistent between those aged 16-29, 30-44 and 45-59, before increasing steadily for those aged 60-74 and 75+.

Figure 37: Acceptability of ODIs, all customers, by household income



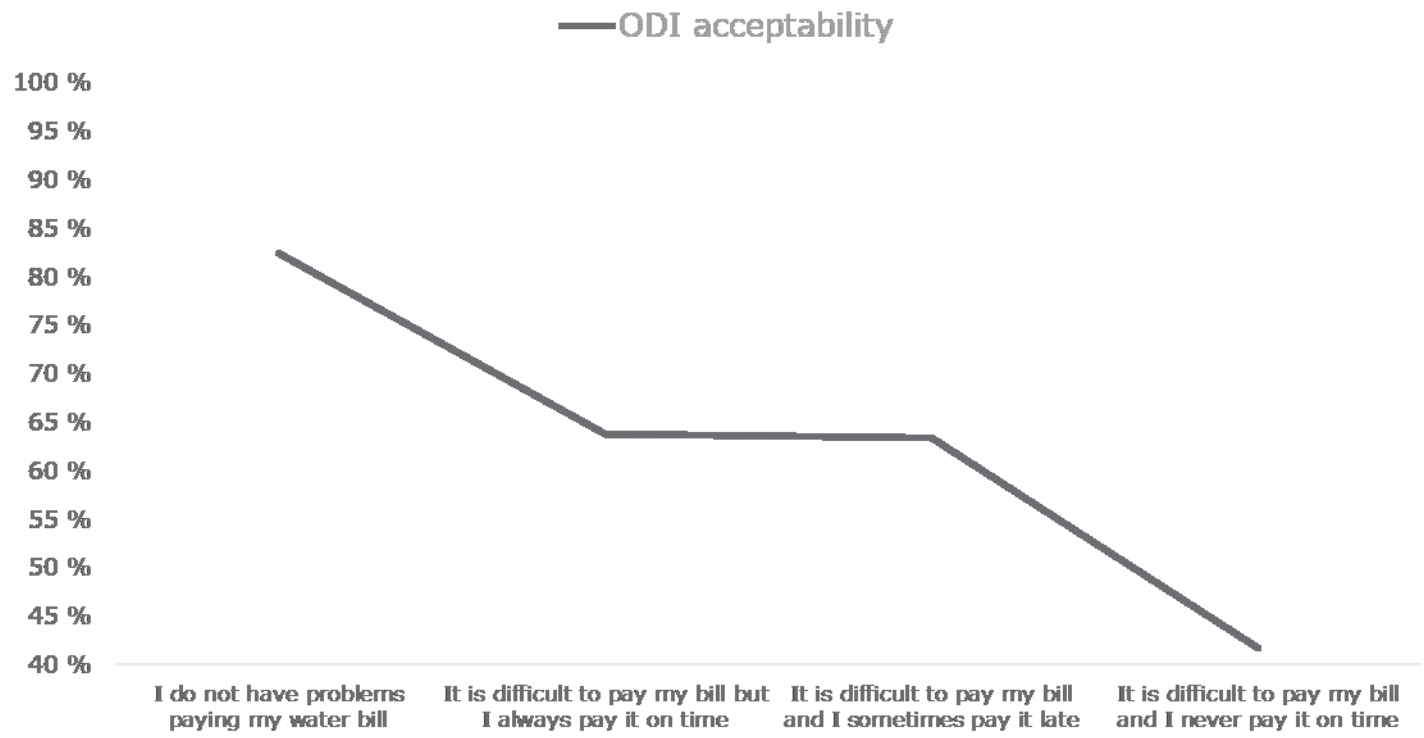
7.2.3 Acceptability of ODIs increases in line with household income. Those with a household income of up to £20,000 are least likely to find the concept acceptable, while those with an income of £75,000+ are most likely. This is largely driven by concerns around (potential) bill increases; those earning up to £20,000 are significantly more likely than those on £75,000+ to reject ODIs because uncertainty about the bill change each year would make it difficult to budget for, and they don't know if they would be able to afford (45% cf. 18%)

Figure 38: Acceptability of ODIs, all customers, by Socio-Economic Classification (SEC) group



7.2.4 As with income, those in higher socio-economic classification groups are more likely to find ODIs acceptable in principle than those in lower socio-economic classification groups.

Figure 39: Acceptability of ODIs, all customers, by financial position



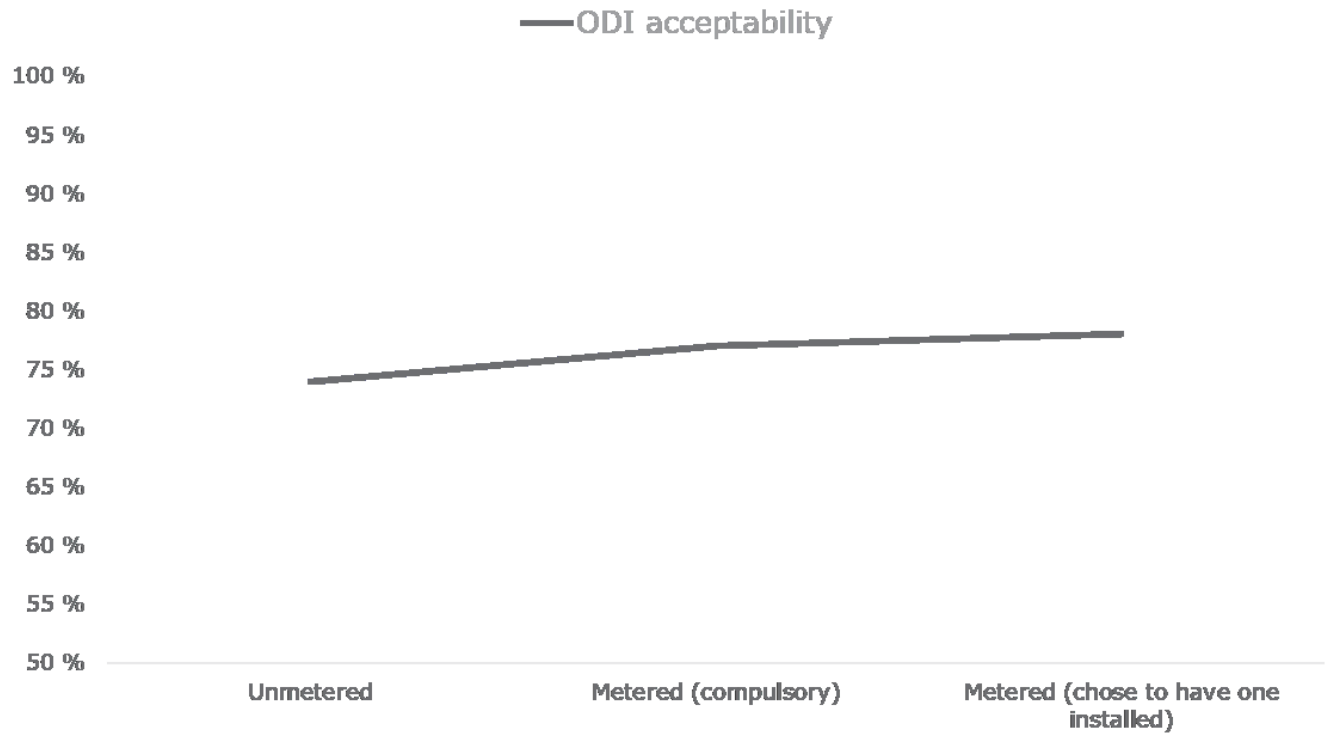
7.2.5 Those who state they have difficulties paying their water bills are significantly less likely to find ODIs acceptable – and, as with income, those with payment difficulties are more likely to cite not being able to forecast or budget for bill changes as a significant objection / issue with the prospect of ODIs than those who have no payment issues.

Table 22: Acceptability of ODIs, all customers, by people on their company's Priority Services Register

	On company's Priority Services Register (n=971)	Not on company's Priority Services Register (n=9,685)
ODI acceptability	76%	76%

7.2.6 There is no difference in acceptability of ODIs between those who are on their company's Priority Services Register and those who aren't.

Figure 40: Acceptability of ODIs, all customers, by metered status



7.2.7 Unmetered customers – who are potentially less accustomed to the idea of variations in their water and sewerage bills – are significantly less likely to find ODIs acceptable than metered customers (whether they were metered compulsorily, or not).

Table 23: Acceptability of ODIs, all customers, by people in the household with a disability / other condition

	Someone in the household has a disability / other condition (n=3,904)	No one in the household has a disability / other condition (n=6,441)
ODI acceptability	72%	79%

7.2.8 Among households where there is someone with a disability or other condition, acceptability of ODIs is significantly lower than in households where no one has a disability or other condition. The main reasons for this are lack of certainty in forecasting bills and affordability (41% of those who find ODIs unacceptable in this group cite these as reasons, compared to only 18% of those where there is no one in the household with a disability or other condition).

Table 24: Acceptability of ODIs, all customers, by experience of issues with water / sewerage services which affect responses to the survey

	Experienced issues with water / sewerage services which affect responses (n=564)	Not experienced issues with water/ sewerage services which affect responses (n=10,215)
ODI acceptability	63%	76%

7.2.9 Customers who have experienced issues with water or sewerage services which affected their survey responses are significantly less likely to consider ODIs acceptable than those who haven't experienced issues (63% cf. 76%).

8. WaSCs vs. WoCs

The following section outlines the key differences in responses between WaSC customers and WoC customers throughout the survey.

- Perceived affordability of the current bill is significantly higher among WoC customers (69%) than WaSC customers (63%). This is likely driven in part by the slightly lower average bills for WoC customers overall (current average bill of £414) than WaSC customers (current average bill of £425).
    - In addition, customers of WoCs are more likely to be in in the higher managerial, administrative and professional occupations socio-economic classification group than WaSC customers (54% cf. 46%) – with this group more likely than others to find current bills affordable.
- Affordability of the proposed bill is similar, with 82% of WoC customers considering the proposed bills affordable compared to only 73% of WaSC customers.
- Affordability of both current and proposed bills between WoC and WaSC customers plays into perceptions of acceptability at both the uninformed and informed levels. At the uninformed level 91% of WoC customers find the proposed bills acceptable, compared to only 86% of WaSC customers. At the informed level, 89% of WoC customers find the proposed combined bill acceptable, compared to only 84% of WaSC customers.
- As with affordability and uninformed and informed acceptability, ODI acceptability is higher among WoC customers than it is among WaSC customers (79% cf. 72%).

9. England vs. Wales

The following section outlines the outcomes at key points of the survey between customers in England and Wales:

- In terms of affordability, both current and proposed, there is no significant difference in outcomes between customers in England and customers in Wales:
  - Current affordability; England 66% agree cf. 67% agree in Wales
  - Future (proposed) affordability; England 77% agree cf. 77% agree in Wales.
- In terms of acceptability (both uninformed and informed), there are no significant differences between customers in England and Wales:
  - Uninformed acceptability (total change); England 88% cf. Wales 89%
  - Informed acceptability (combined bill); England 86% cf. Wales 88%.
- The only area of difference across the core questionnaire measures is in acceptability of ODIs, which customers in England are more likely to find it acceptable (76%) than customers in Wales (68%).

10. Online vs. Face to face

We wanted to understand whether the way in which surveys were carried out – either face-to-face or online – could have influenced the findings. This was important as some water companies had mostly online interviews, and others had mostly face to face. As noted earlier, this was necessary because there are not enough people on online panels to provide the sample size needed for some of the smaller water companies. For these companies, the sample had to comprise a larger proportion of face-to-face interviews than for others.

The following section outlines the outcomes at key points of the survey between customers who were interviewed online and customers who were interviewed face to face:

- Customers who were interviewed face to face are significantly more likely to find the proposals acceptable at the uninformed level;
    - Uninformed acceptability from 2019 to 2020: face to face, 92%; online, 86%
    - Uninformed acceptability of yearly changes: face to face, 91%; online, 86%
    - Uninformed acceptability, total change: face to face, 90%; online, 87%.
- At the informed level there are fewer significant differences between customers who were interviewed online and customers who were interviewed face to face:
    - Informed acceptability, water services: face to face, 88%; online, 87% (not significant)
    - Informed acceptability, sewerage services: face to face, 89%; online, 86% (significant)
    - Informed acceptability, total package: face to face, 88%; online, 86% (not significant).
- As with uninformed acceptability, when considering ODIs, customers interviewed face to face are more likely to find this acceptable (78%) than those interviewed online (75%).
- When looking at affordability, it is again customers who were interviewed face to face who are more likely to consider their current bill affordable (73% cf. 64% customers interviewed online), and the proposed bill (face to face, 83% cf. 75%, online).

When looking at demographic differences it is important to note that customers interviewed face to face are significantly more likely to opt to 'prefer not to say' to classification questions (e.g. 34% of customers interviewed face to face opted against providing a household income banding, compared to only 6% of those online). As a result, a complete demographic comparison isn't possible, however it is noticeable that:

- (Due to the specified quota mix per company) customers who were interviewed face to face are significantly more likely to be 60+ (57%) compared to those interviewed online (36%)
- Customers interviewed face to face are less likely than those interviewed online to be in a household where someone has a disability or other condition (30% cf. 38%)

- However, customers interviewed face to face (who elected to provide their household income band) are more likely to have a lower annual income than those who were interviewed online (43% up to £20,000 cf. 29% up to £20,000 online).

To test whether the survey method had an impact on data or not, factor and key driver analysis were conducted to test the hypothesis that being interviewed face to face increases the likelihood of finding water companies' proposals acceptable.

The first step was to conduct factor analysis to identify which factors are most closely correlated with customers' acceptability ratings.

Table 25: Acceptability factor analysis

Factor	Uninformed acceptability (total bill change)	Informed acceptability (combined bill)
Customer of a WaSC / WoC	Low	Low
Age	Low	Low
Gender	Low	No correlation
SEG	Medium	Medium
Methodology (online or face to face)	Low	No correlation
On company's PSR	Low	Low
Experienced any issues with services which affect survey responses?	Low	Low
Children in the household	Low	Low
Financial position	Medium	Medium
Household income	Medium	Low
Accept household bills include inflation	Medium	Medium
Generally, income doesn't keep up with inflation	Medium	Medium
Changes in inflation aren't a particular concern for me	Low	Low
I don't think about the effect of inflation on my bills	Low	Low
I know that my bills include inflation over time	Medium	Medium
It's hard to predict what level inflation will reach in the next few years	Low	Low
Likelihood of income keeping up with inflation	Medium	Medium
Metered?	Low	Low
Affordability (current)	High	High

This analysis reveals that the factor with the highest correlation to acceptability ratings is current bill affordability, whilst methodology (online or face to face) has a low correlation with uninformed acceptability ratings and no correlation with informed acceptability ratings.

To test the hypothesis further, Key Driver Analysis was conducted to understand *where* methodology sits in the list of factors that influence acceptability.

Table 26: Drivers of uninformed acceptability

Drivers of uninformed acceptability	Relative importance
Affordability of current bill	0.264
I know that all of my bills change by inflation over time	0.127
Financial position	0.097
I accept that all my household bills automatically include inflation	0.084
Company type (WaSC / WoC)	0.068
Generally, my income doesn't keep up with inflation	0.057
On company's Priority Services Register?	0.035
SEG	0.034
Experienced issues with services which affect survey responses	0.031

Table 27: Drivers of informed acceptability

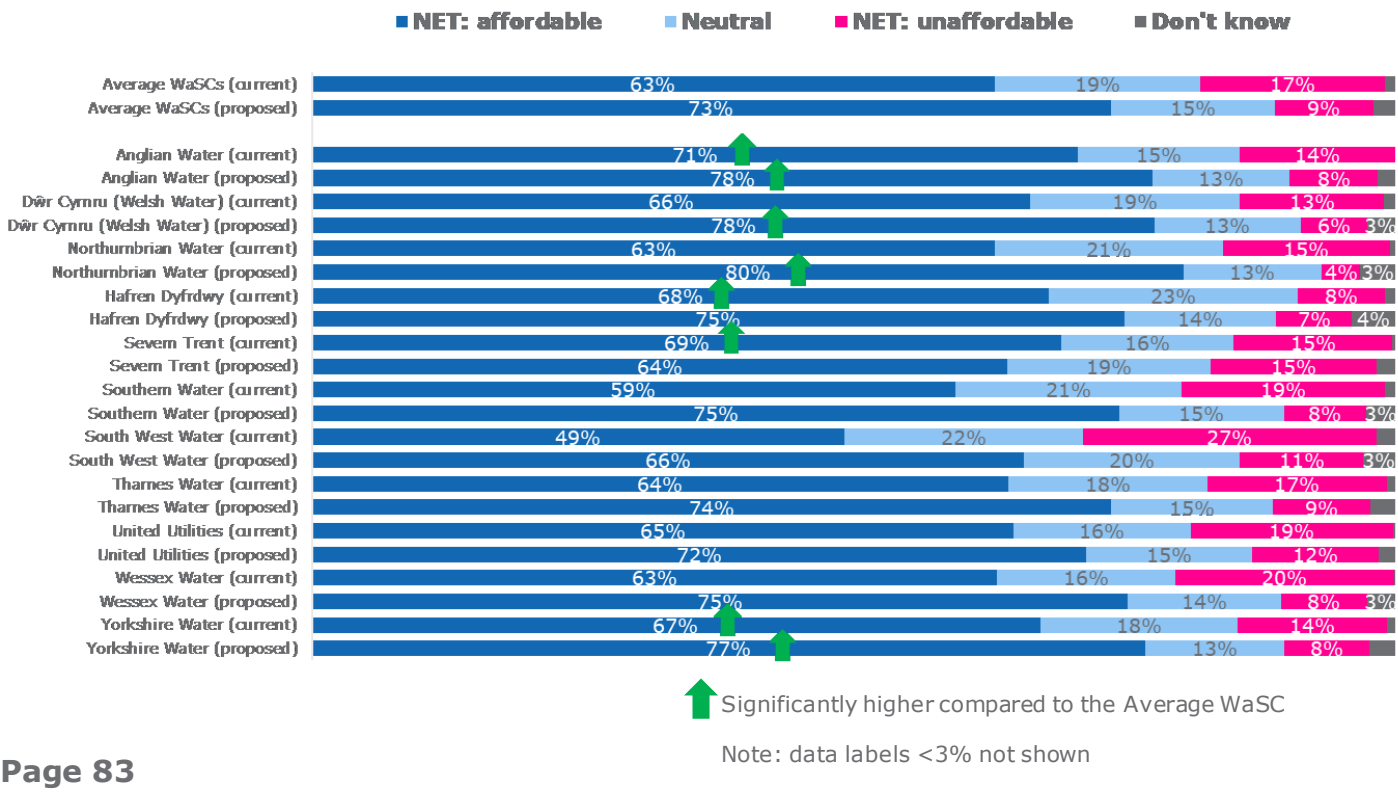
Drivers of informed acceptability	Relative importance
Affordability of current bill	0.239
I know that all of my bills change by inflation over time	0.111
Financial position	0.111
I accept that all my household bills automatically include inflation	0.084
Company type (WaSC / WoC)	0.081
Generally, my income doesn't keep up with inflation	0.052
Likelihood of household income keeping up with inflation	0.051
Changes in inflation rate aren't a particular concern for me	0.029
Experienced issues with services which affect survey responses	0.028
SEG	0.022

The Key Driver Analysis shows that affordability has the strongest (relative) importance on customer acceptability scores, followed by knowledge that bills change by inflation and financial position (whether the customer has any difficulties with paying their bill on time, or not). Methodology (whether interviewed face to face or online) meanwhile is not in the top drivers of acceptability.

11. Hafren Dyfrdwy

The following section shows combined Hafren Dyfrdwy data alongside other WaSC companies. Due to the make-up of the Hafren Dyfrdwy customer base (with customers in Powys receiving both water and sewerage services from Hafren Dyfrdwy and customers in Wrexham receiving their water services from Hafren Dyfrdwy and their sewerage services from Dŵr Cymru Welsh Water), interviews (and the questionnaire structure) was different for customers in each area. Powys customers were surveyed as WASC customers, and Wrexham as WoC customers. The total sample was still representative of the customer base, linked to census data for each region. As Hafren Dyfrdwy is considered a WaSC from a regulatory perspective there is a need to have a holistic view of Hafren Dyfrdwy data against other WaSC companies. In this section, Hafren Dyfrdwy data is rolled up and includes all interviews (200 interviews with customers in Powys and 300 interviews with customers in Wrexham). The average WaSC score shown includes all WaSC companies, including Hafren Dyfrdwy Powys customers, but does not include Hafren Dyfrdwy Wrexham customers due to their sewerage services being provided by Dŵr Cymru and the different questionnaire routing they experienced as a result.

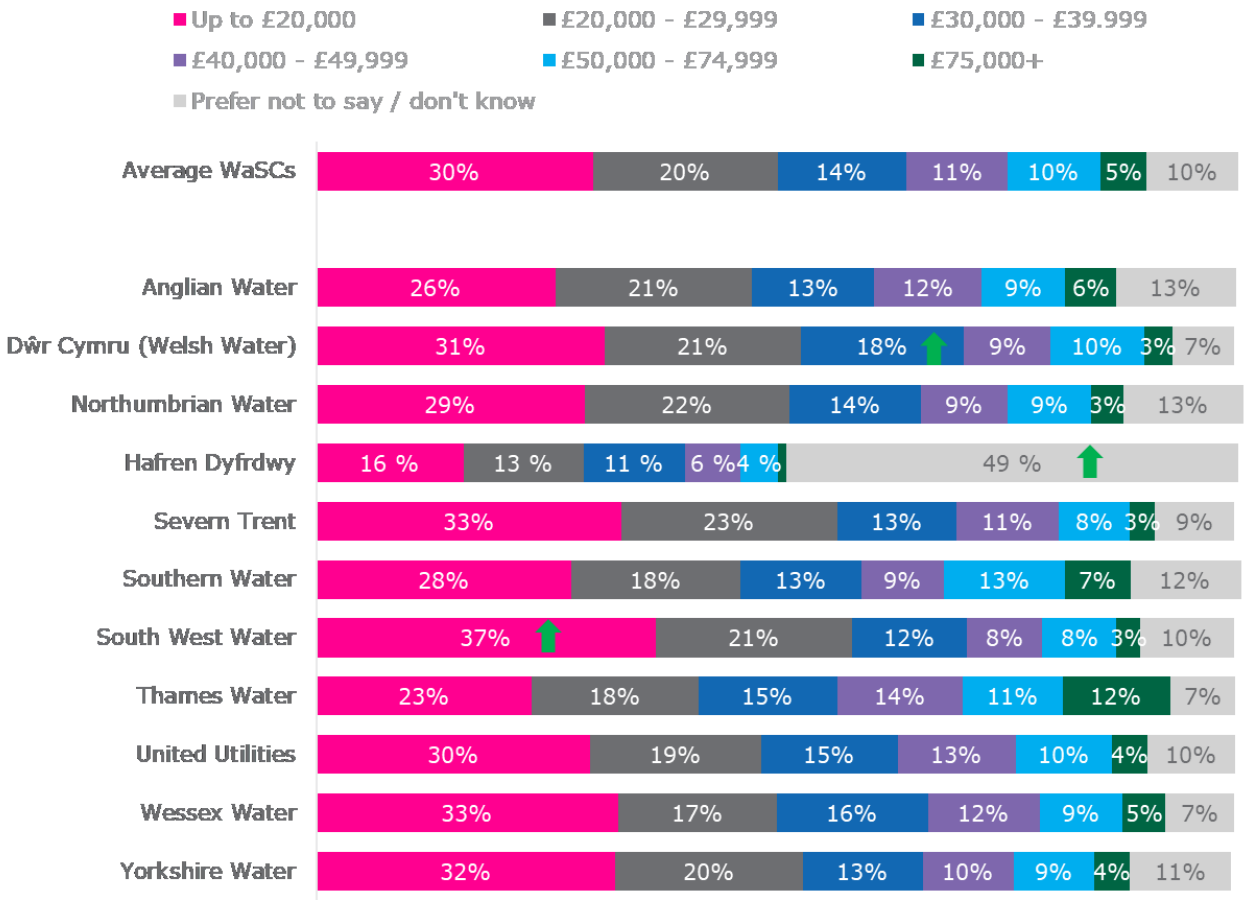
Figure 41: Affordability, WaSCs



Note: data labels <3% not shown

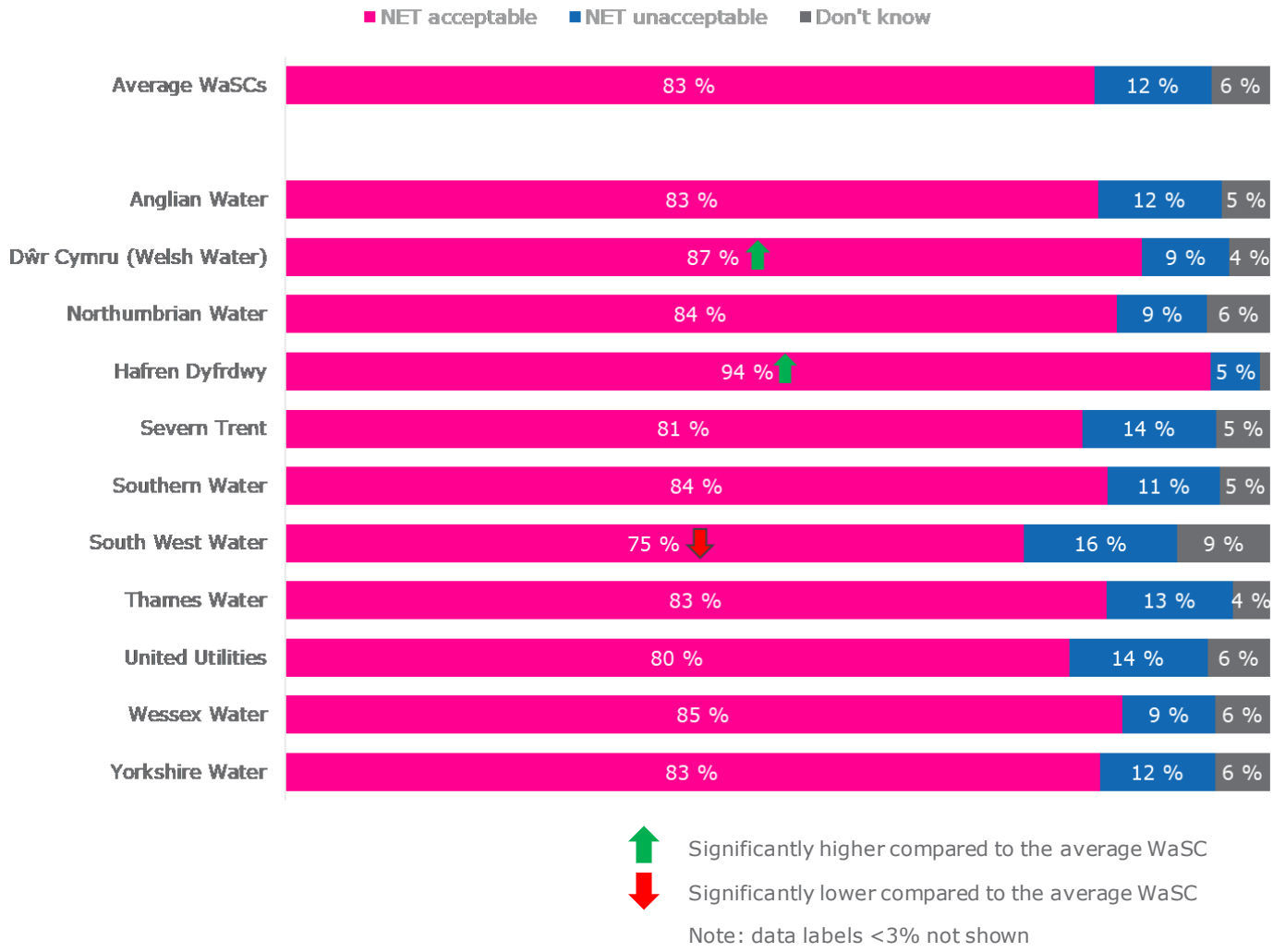
- Current affordability among Hafren Dyfrdwy customers is significantly higher than the WaSC average (68% cf. 63%); however for proposed affordability there is no significant difference (75% cf. 73%).

Figure 42: Household income, WaSCs



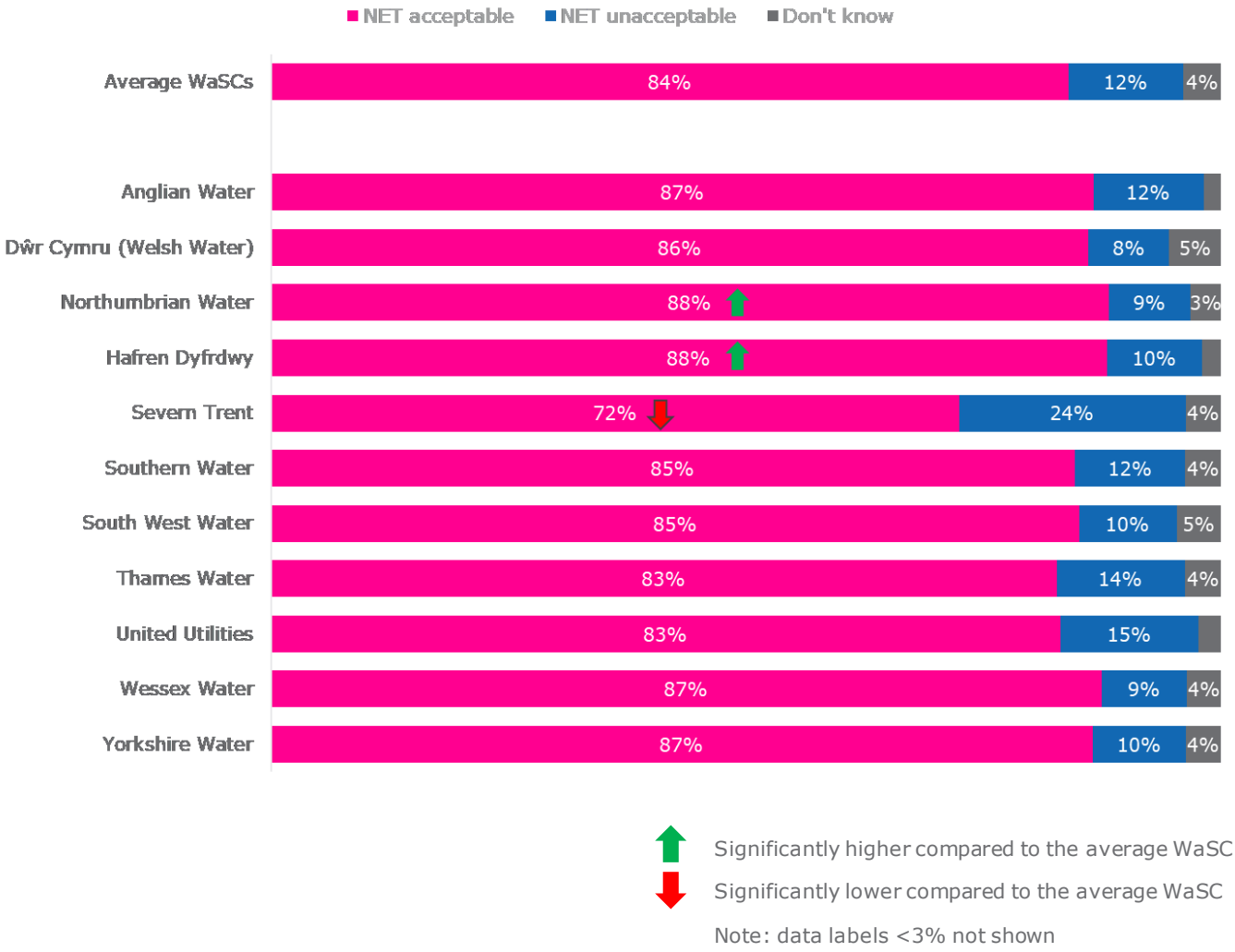
- Due to Hafren Dyfrdwy customers being interviewed exclusively face to face the proportion of Hafren Dyfrdwy customers who opt against providing a household income is significantly higher than the WaSC average.

Figure 43: Uninformed acceptability, 2019/20



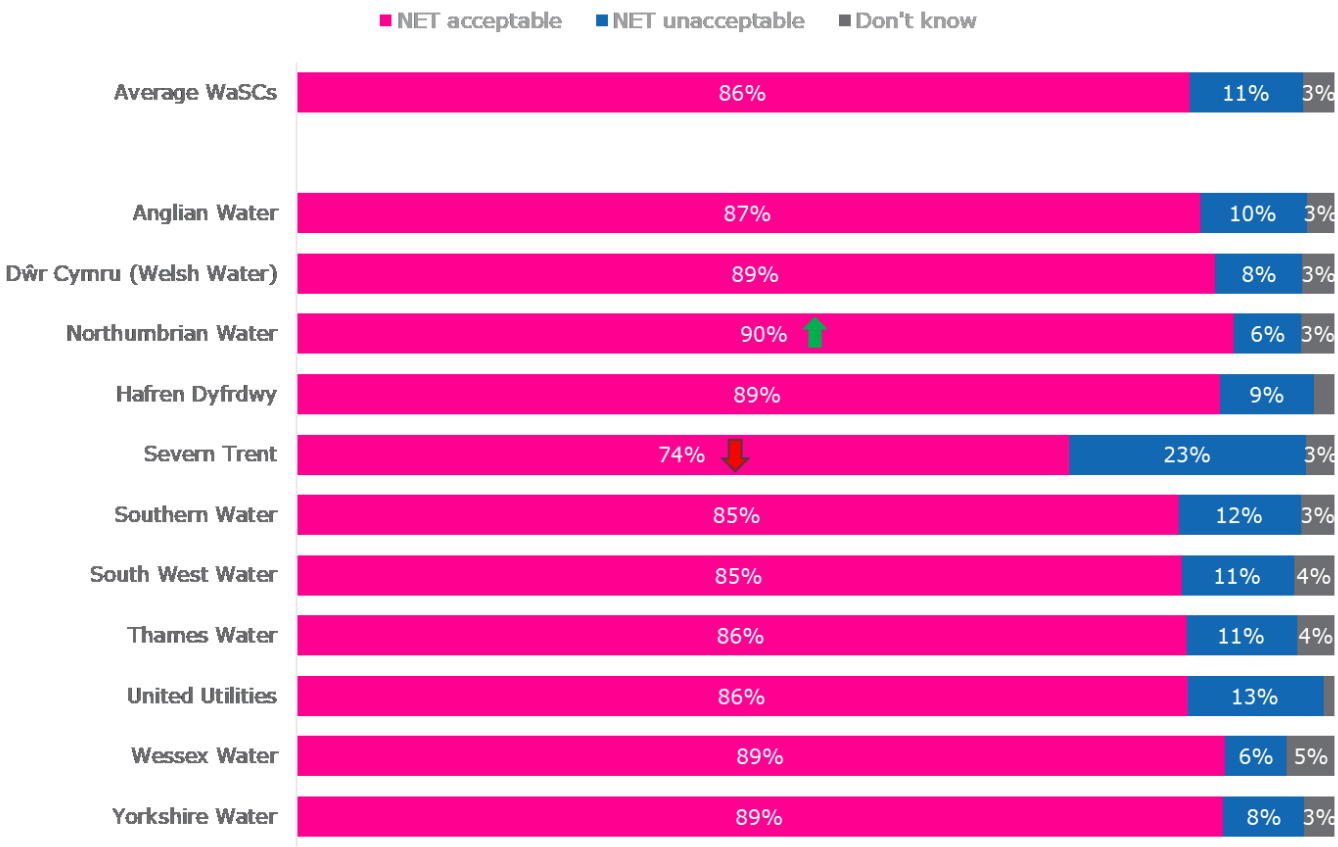
- Uninformed acceptability for the bill change from 2019 to 2020 among Hafren Dyfrdwy customers is significantly higher than the WaSC average, and all other WaSC companies.

Figure 44: Uninformed acceptability, yearly change



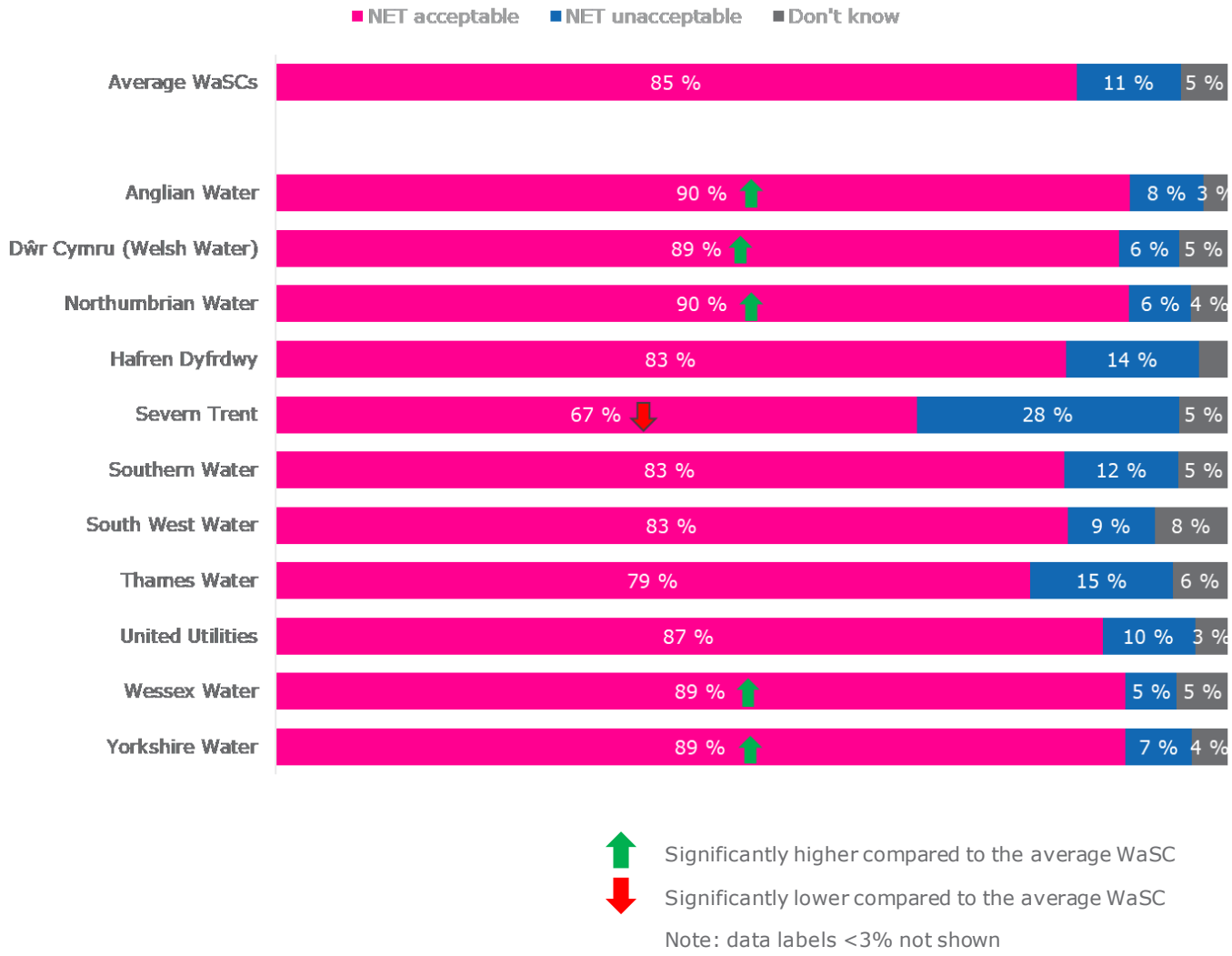
- Uninformed acceptability of yearly changes among Hafren Dyfrdwy customers is significantly higher than the WaSC average.

Figure 45: Uninformed acceptability, total change



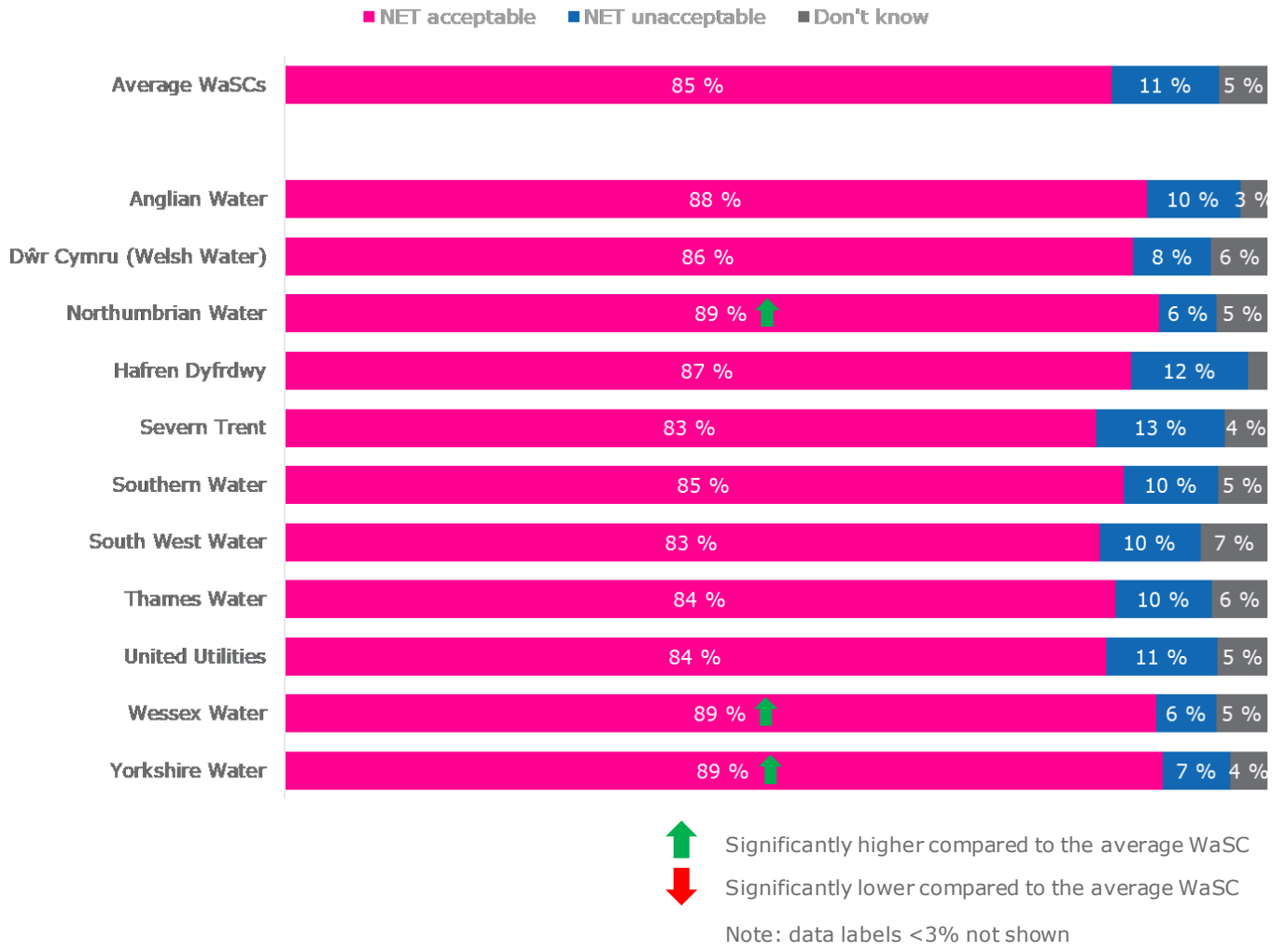
- Uninformed acceptability of the total change among Hafren Dyfrdwy customers is slightly (but not significantly) higher than the average for WaSCs.

Figure 46: Informed acceptability, water services



- Informed acceptability of water services among Hafren Dyfrdwy customers is slightly (but not significantly) lower than the average for WaSCs.

Figure 47: Informed acceptability, sewerage services

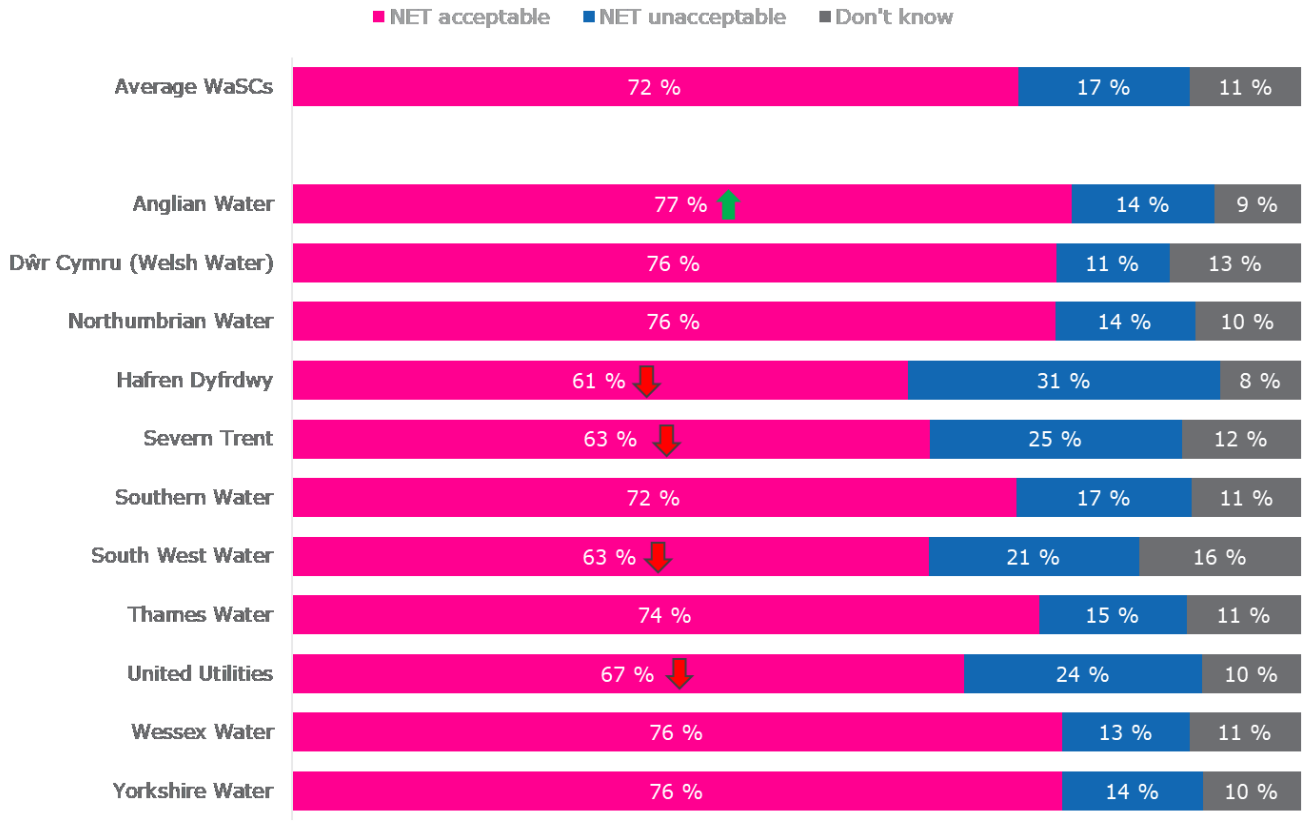


- Informed acceptability of sewerage services among Hafren Dyfrdwy customers is slightly (but not significantly) lower than the average for WaSCs - however, when treated in isolation, Hafren Dyfrdwy customers in Powys are significantly less likely than the average to consider the proposed bill changes acceptable (77%).

Figure 48: Informed acceptability, combined services

- Informed acceptability of the combined services among Hafren Dyfrdwy customers is slightly (but not significantly) higher than the average for WaSCs.

Figure 49: Informed acceptability, combined services*



Significantly higher compared to the average WaSC

Significantly lower compared to the average WaSC

Note: data labels <3% not shown

*to obtain a combined ODI acceptability score for Hafren Dyfrdwy, ODI acceptability for water services for customers in Wrexham is rolled up with the overall ODI acceptability score for customers in Powys

- Acceptability of ODIs among Hafren Dyfrdwy customers is significantly lower than the average WaSC.

12. Conclusions

- This survey measured three core levels of customer acceptability of water companies' business plans and proposed bills for the period 2020-2025. The first of these was to understand customers' uninformed acceptability of proposed bills (from 2019-20, at a year on year level and at a total change level) in order to best reflect the 'average' customer's awareness and understanding of water companies' service level commitments. After gaining an uninformed view, customers were presented with a more detailed snapshot of their water (and sewerage) company's performance commitments alongside the same billing information to gather informed acceptability data. The third core level of acceptability tested customer reactions to the potential effect of Outcome Delivery Incentives (ODIs) on the minimum and maximum bill they might pay, preceded by an explanation of the rationale for ODIs and a note that bills are more likely to end up towards the middle of the potential bill range than at the upper or lower end .

- Overall, there is little difference in acceptability between uninformed and informed acceptability levels. Uninformed acceptability of the total bill change is 88% overall, with customers in Wales being significantly more likely to consider this acceptable (90%) than customers in England (87%). For informed acceptability of the total bill, 87% of customers find this acceptable, with 88% of customers in England considering it acceptable and 86% of customers in Wales.

- Across England and Wales, income and socio-economic group are closely linked to acceptability. Customers who have lower annual household incomes and those in lower socio-economic groups (especially those who are long term unemployed / never worked / full time students) are significantly less likely to find the proposals acceptable at either the uninformed or the informed levels:
    - 85% of customers with a household income of up to £20,000 find the uninformed total change acceptable, significantly below those with higher incomes (£20,000 - £29,999, 89%; £30,000 - £39,999, 91%; £40,000 - £49,999, 92%; £50,000 - £74,999, 92%; £75,000+, 93%)
    - 84% of customers with a household income of up to £20,000 find the informed total package acceptable, significantly below those with incomes of £30,000+ (£30,000 - £39,999, 89%; £40,000 - £49,999, 91%; £50,000 - £74,999, 91%; £75,000+, 92%).

- Acceptability of ODIs is significantly lower than acceptability of the business plans, with 76% finding the potential effect of ODIs on bills acceptable (for WoC customers this is based on acceptability in relation to their water services). Again, potential cost and uncertainty around affordability features highly for those who find the potential effect of ODIs unacceptable – with the main reasons being; "The bill should be fixed and not be open to change as services change" (49%), and "Uncertainty about how the bill could change each year makes budgeting for it difficult and I don't know if I'll able to afford it" (40%).

- Customers were asked two separate affordability questions – one about the affordability of their current bill, and one about the (perceived) affordability of the proposed bill, before the effect of ODIs. Overall, two-thirds (66%) of customers consider their current bill affordable, and 77% of customers consider the (potential) future bill affordable – suggesting that the Draft Determinations are generally considered to be fair and affordable. The uplift in affordability likely reflects that for all companies except Hafren Dyfrdwy (Powys), Bournemouth Water (with Wessex Sewerage) and Severn Trent, bills would fall over the five years from 2020 to 2025, before the effect of ODIs.

13. Appendix 1 – respondent profile

The following section details key respondent profile characteristics.

13.1 Household make up

Figure 50: Household make up, adults – overall, England and Wales

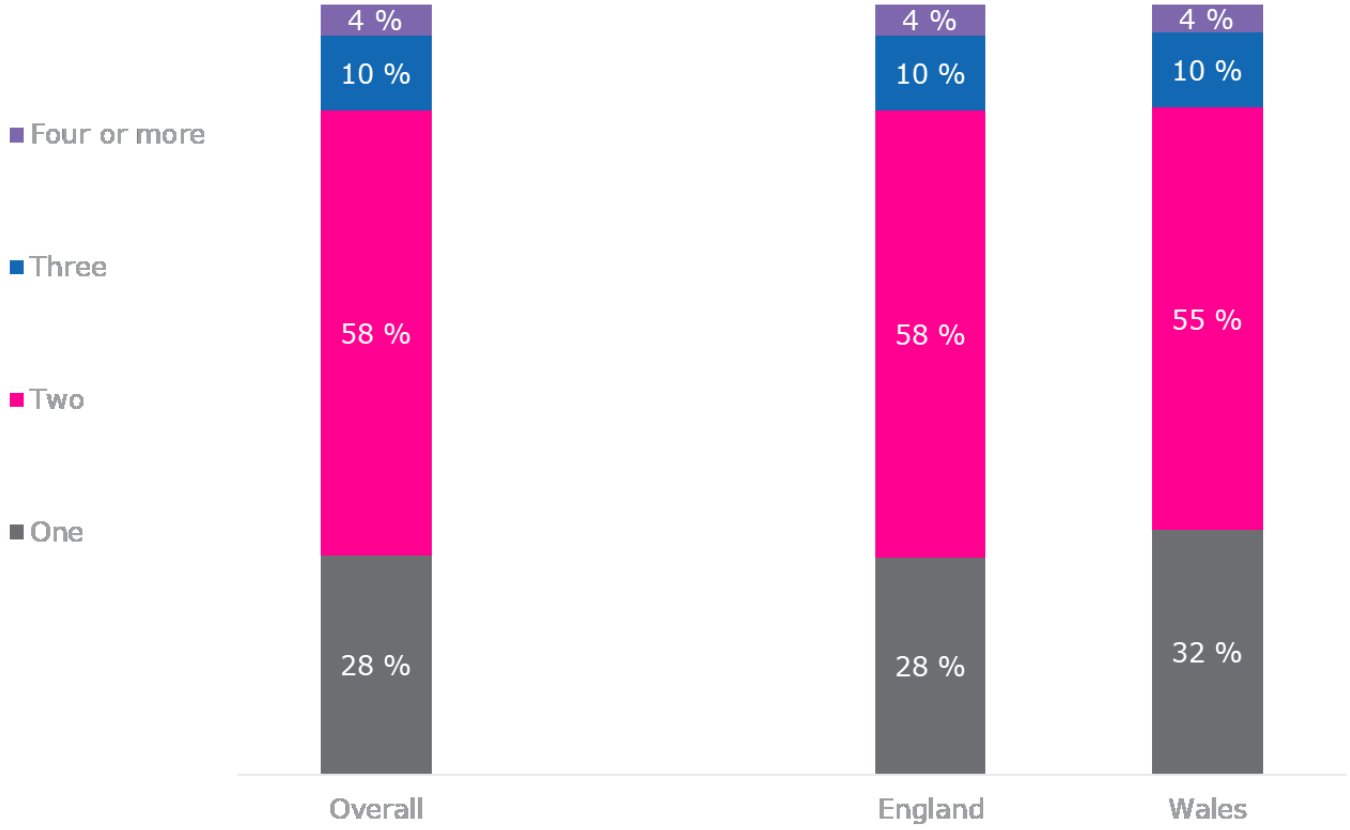


Figure 51: Household make up, children aged 6-17 – overall, England and Wales

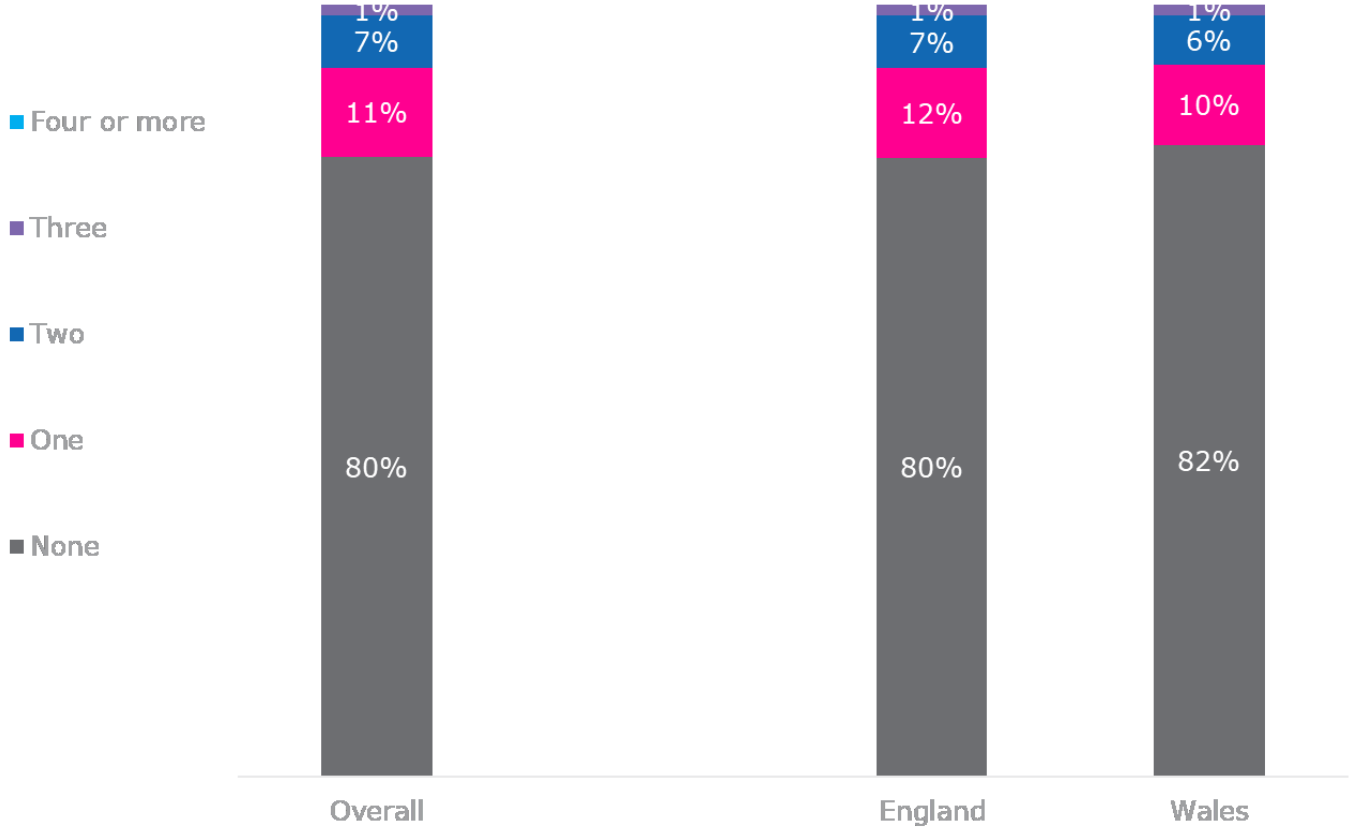
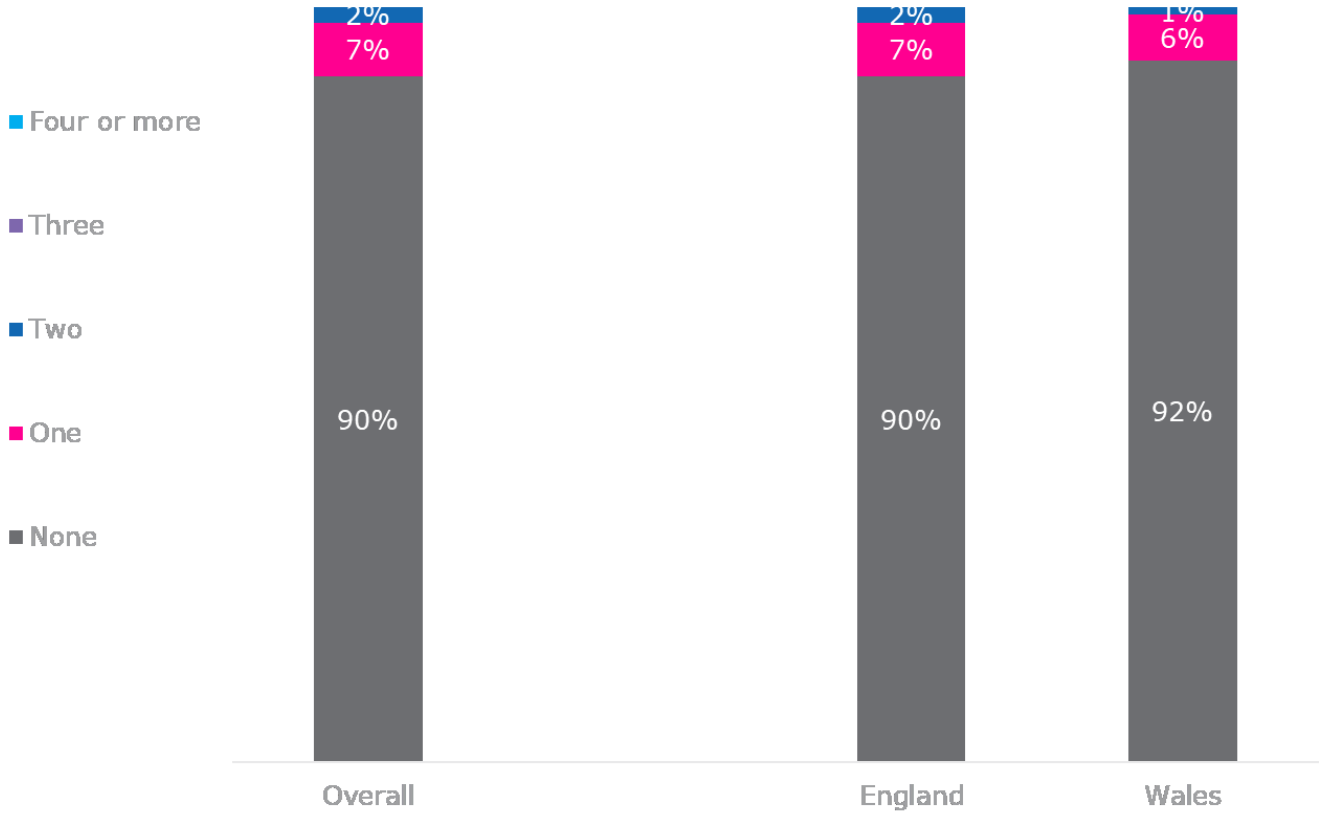


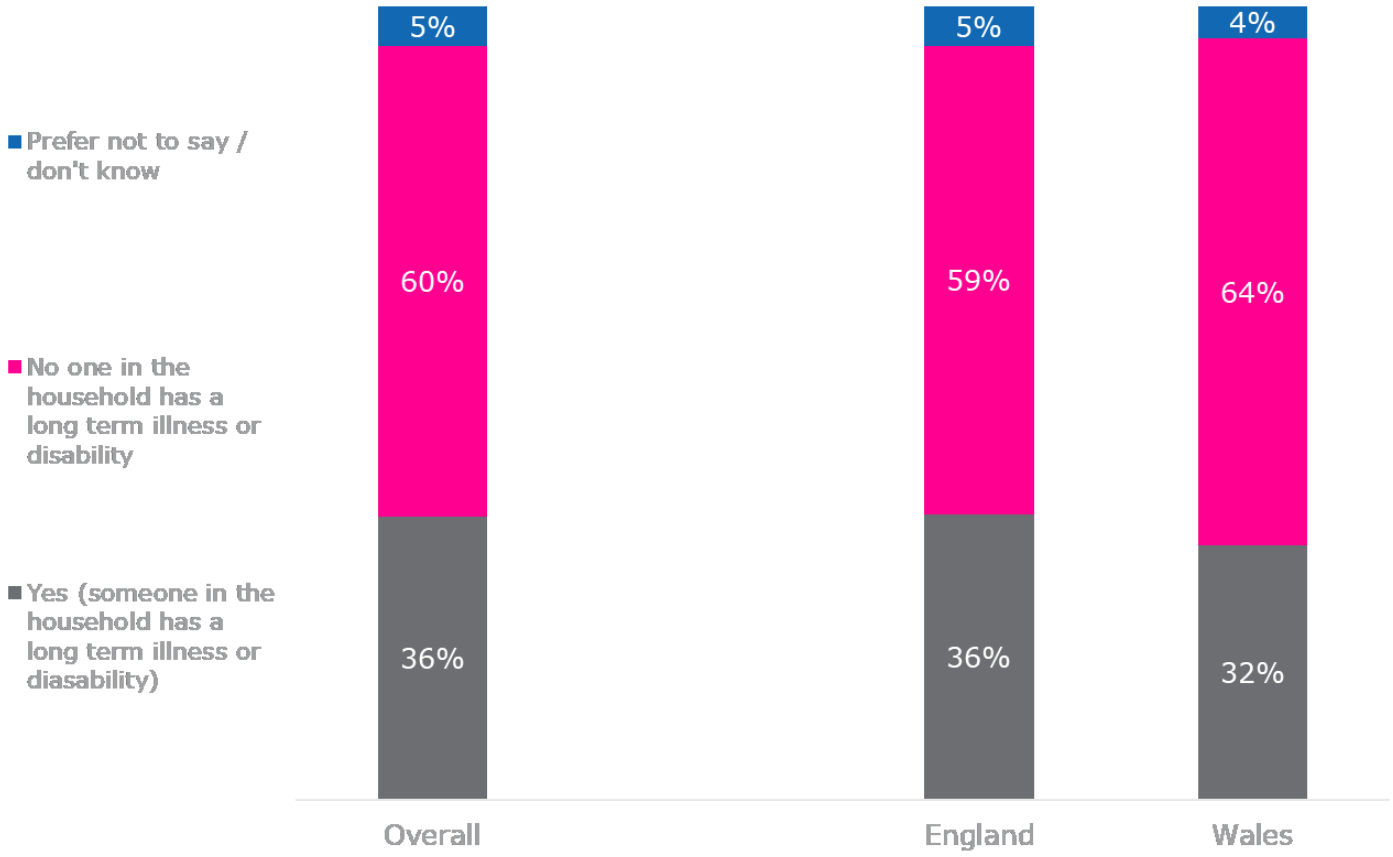
Figure 52: Household make up, children aged 0-5 – overall, England and Wales



- There are no significant differences in household make ups between customers in England and Wales.
- The majority (58%) live in a household with 2 adults, while just over a quarter (28%) live as the sole adult in the household
- 8 in 10 have no children aged 6-17 in the household and 9 in 10 have no children aged 0-6 in the household

13.2 Long term illness, health problems or disability

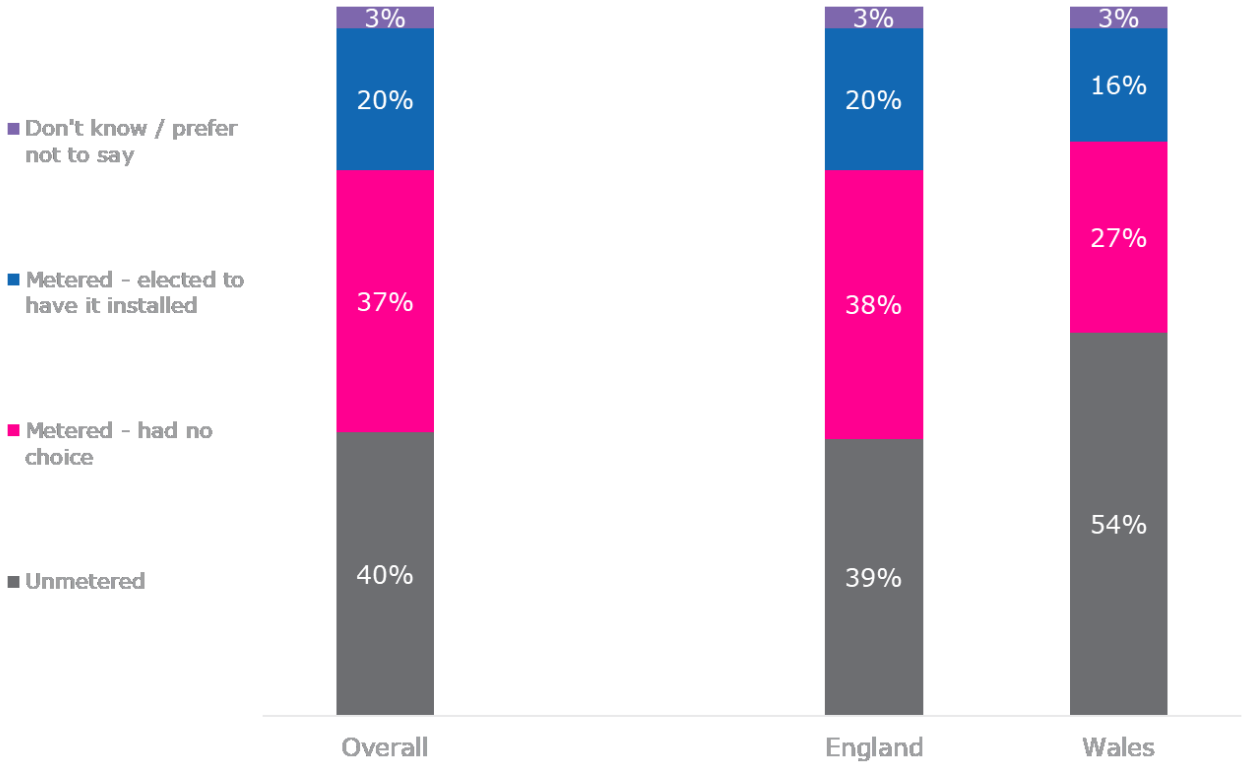
Figure 53: Long term illness or disability in household – overall, England and Wales



- Customers in Wales are less likely to have someone in the household with a long term illness or disability

13.3 Metered status

Figure 54: Metered status – overall, England and Wales



- Customers in England are significantly more likely to be metered than customers in Wales

14. Appendix 2 – questionnaire

Questionnaire

CC Water PR19 DD Research

Client name:	CC Water
Project name:	PR19 Draft Determination Research
Job number:	5540
Methodology:	ONLINE/ CAPI
Version	12

Notes on this document

- Instructions in CAPS are for computer programming
- Instructions in *italics* are for telephone interviewers
- **Bold** or underlined words are for emphasis within a question
- Different question types have different numbers:
  - Screener questions are labelled S01, S02, S03 etc.
  - Main survey questions are labelled Q01, Q02, Q03 etc.
  - Further demographic / classification questions are labelled C01, C02, C03 etc.
  - Number codes are included on each question for data processing purposes

Introduction

All Respondents:

This research is being carried out by DJS Research Ltd on behalf of the CCW[16] which is the consumer organisation working on behalf of customers of the water companies in England and Wales. The aim of the research is to find out what people think about plans for their [water and sewerage / water] company's services for 2020-2025 and how much they will cost.

You will need to know which water company or companies provide your water and sewerage services in order to complete this survey. This can be found on your current water and sewerage bill(s) and so it would be ideal if you could have your water and sewerage bill to hand.

Before you begin, we want to tell you that every five years, water and sewerage companies write a business plan setting out how they will meet drinking water, sewerage and environmental quality standards and deliver high quality customer service.

Ofwat (the regulator for the water industry), reviews each plan and sets investment and service levels, and the prices that companies can charge their customers for these services. This is your opportunity to have your say on proposals for your company's service levels and bills before Ofwat finalises them.

Please be assured that any answer you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society and none of your comments will be attributed to you personally. Any personal information we ask for is purely to classify your answers and will not be passed back to the CCW or any third parties for any marketing or sales purposes.

This survey should take no more than 15 minutes to complete.

Should you have any questions about the research please contact:
Matt Prince at mprince@djsresearch.com

ABOUT YOU

Q01.

Base: All respondents

Are you solely or jointly responsible for paying the water and sewerage bill?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No, I am not responsible for paying the bill		CLOSE

Q02.

Base: All respondents

Please tell us which water company provides your water supply…

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Anglian Water		
2	Dee Valley Water		
3	Dŵr Cymru (Welsh Water)		
4	Northumbrian Water		
5	Hafren Dyfrdwy		
6	Severn Trent		
7	Southern Water		
8	South West Water		
9	Thames Water		
10	United Utilities		
11	Wessex Water		
12	Yorkshire Water		
13	Affinity Water (Central)		
14	Affinity Water (East)		
15	Affinity Water (South East)		
16	Bristol Water		
17	Cambridge Water		
18	Essex and Suffolk Water		
19	Hartlepool Water		
20	Portsmouth Water		
21	Bournemouth Water		
22	South East Water		
23	South Staffordshire Water		
24	Sutton & East Surrey Water		
80	Other		THANK & CLOSE
85	Don't know		THANK & CLOSE

Q03.

Base: All respondents coding Q02/2, 5 or 6

And in which of the following do you live?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Wrexham		
2	Powys		
3	Chester		

DP: Auto recode Q02 answer as follows: If Q03/1 or 2, code answer to Q02 as Hafren Dyfrdwy. If Q03/3 code answer to Q02 as Severn Trent.

Q04.

Base: All respondents

And please tell us which water company provides your sewerage service…

IF CUSTOMER HAS SEPTIC TANK OR STATES 'OTHER' THANK AND CLOSE

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Anglian Water	Q02/1,13,14,17,18	
2	Dŵr Cymru (Welsh Water)	(Q02/3) or (Q03/1)	
3	Northumbrian Water	Q02/4,19	
4	Hafren Dyfrdwy	Q02/5	
5	Severn Trent	Q02/6,23	
6	Southern Water	Q02/7,15,20,21,22,24	
7	South West Water	Q02/8	
8	Thames Water	Q02/9,13,14,18,22,24	
9	United Utilities	Q02/10	
10	Wessex Water	Q02/11,16,21	
11	Yorkshire Water	Q02/12	
12	I have a septic tank		THANK & CLOSE
80	Other		THANK & CLOSE
85	Don't know		THANK & CLOSE

INFO1.

Base: All respondents

If your water supply and sewerage services are provided by two different companies, please bear this in mind when giving your responses.

INFO PAGE

Q05.

Base: All respondents

Are you currently charged for water through a water meter?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		GO TO Q07
85	Don't know/ can't say		GO TO Q07

Q06.

Base: All respondents who are charged through a water meter (Q03c/1)

Why do you have a water meter installed at your home? *Please choose one answer only*
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	It was already installed when I moved in		
2	I asked for one to be installed		
3	I had no choice – the company fitted it after I moved in		
80	Other (please specify)	OPEN TEXT BOX	
85	Don't know/ can't say		

Q07.

Base: All respondents

Please select the gender which you most identify yourself with…

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
3	Prefer to self describe as… (Please write in)		
86	Prefer not to say		

Q08.

Base: All respondents

And which of the following age groups do you fall into?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	16-29		
2	30-44		
3	45-59		
4	60-74		
5	75+ years old		
86	Prefer not to say		

Q09.

Base: All respondents

Are you retired? *Please choose one answer only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
3	Refused		

Q010.

Base: All respondents

Please answer the next set of questions based on your current job. If you're currently not working or are retired, please base your answers on your last job.

Do you (did you) work as an employee or are you (were you) self-employed?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Employee		GO TO Q11
2	Self-employed with employees		GO TO Q12
3	Self-employed/freelance without employees		GO TO Q14
4	Not applicable - Long term unemployed/never worked		GO TO Q15
5	Not applicable - Full time student		GO TO Q15

Q011.

Base: All code 1 (employees) at Q10 (Q10/1)

How many people work (worked) for your employer at the place where you work (worked)?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	1-24		GO TO Q13
2	25 or more		GO TO Q13

Q012.

Base: All code 2 (self-employed with employees) at Q10 (Q10/2)

How many people do (did) you employ?

SINGLE RESPONSE

Q013. Code	Answer list	Scripting notes	Routing
1	1-24		GO TO Q13
2	25 or more		GO TO Q13

Q014.

Base: All code 1/2 (employees / self-employed with employees) at Q10 (Q10/1_2)

Do (did) you supervise the work of other employees on a day to day basis? (e.g. a supervisor, manager or foreman responsible for overseeing the work of other employees on a day to day basis)

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		GO TO Q14
2	No		GO TO Q14

Q015.

Base: All code 1/2/3 (employees / self-employed with employees / self-employed without employees) at Q10 (Q10/1_3)

What do you do for work? If you are not working now, what did you do in your last job?

SINGLE RESPONSE

CAPI ONLY: INTERVIEWER, IF RESPONDENT REFUSES READ OUT: I would like to reassure you that this information is only being collected to make sure we have a good mix of people included in the survey, it will not be used for any other purpose. On this basis would you be happy to tell me about the sort of work you do, or if you're not working now, what you did in your last job?

Code	Answer list	Scripting notes	Routing
1	Modern professional occupations such as: teacher – nurse – physiotherapist – social worker – welfare officer – artist – musician – police officer (sergeant or above) – software designer		
2	Clerical and intermediate occupations such as: secretary, personal assistant – clerical worker – office clerk – call centre agent – nursing auxiliary – nursery nurse		
3	Senior managers or administrators (usually responsible for planning, organising and co-ordinating work, and for finance) such as: finance manager – chief executive		
4	Technical and craft occupations such as: motor mechanic – fitter – inspector – plumber – printer – tool maker – electrician – gardener – train driver		
5	Semi-routine manual and service occupations such as: postal worker – machine operative – security guard – caretaker – farm worker – catering assistant – receptionist – sales assistant		
6	Routine manual and service occupations such as: HGV driver – van driver – cleaner – porter – packer – sewing machinist – messenger – labourer – waiter/waitress – bar staff		

7	Middle or junior managers such as: office manager – retail manager – bank manager – restaurant manager – warehouse manager – publican		
8	Traditional professional occupations such as: accountant - – solicitor – medical practitioner – scientist – civil/mechanical engineer		
86	Refused		THANK AND CLOSE

DP NOTE: IF QUOTAS NOT MET SHOW FOLLOWING SCREEN

Thank you for your answers. Today we're looking for certain types of people to answer our survey. Unfortunately, this means we are unable to continue.

Please click the 'Finish Survey' button to complete the survey

Q016.

All respondents

How much do you agree or disagree that the water and sewerage charges that you pay for are affordable to you?

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree/nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

Q017.

All respondents

How much do you currently pay for your water and sewerage services? This can be found on your most recent bill. You should be able to see an amount for water services and a separate amount for sewerage services. Please look at your most recent bill and enter the two amounts in here, then specify how many months the bill covers [DP: Show four open numeric boxes, one for water amount and one for sewerage amount also show two open numeric boxes [MAX 12] one for water bill frequency and one for sewerage bill frequency].

[Only show if Hafren Dyfrdwy customer, Q03/1_2] If the name of your water company has changed in the last 12 months, please think about the last bill you received.

OPEN RESPONSE: NUMERIC. CALCULATE A YEARLY FIGURE FOR WATER AND SEWERAGE USING OPEN BOX VALUES AND FREQUENCY

Code	OPEN TEXT BOX	Scripting notes	Routing
		OPEN NUMERIC BOX	
85	Don't know IF UNKNOWN USE AVERAGE BILL AMOUNT MOVING FORWARD		

If DK coded at Q016: Please note that the average water and sewerage bill is [INSERT AVERAGE BILL FOR WATER COMPANY]. You will be asked a number of questions throughout this survey based on this average yearly bill.

Q018.
All respondents not code 85 (don't know) at Q16
You've said that your current overall bill is [SHOW FIGURE GIVEN at Q16] – can you confirm that this is for [SHOW NUMBER OF MONTHS ENTERED AT Q16] months?
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No - return to previous question to re-enter the amount		

Q019.
All respondents not code 85 (don't know) at Q16
Is this from a bill or is this your best estimate?
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	From a bill		
2	Best estimate		

UNINFORMED ACCEPTABILITY

INFO2.
Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)

The next set of questions are about proposed changes to your water and sewerage bill from the years 2020 to 2025. You will be shown a number of different figures relating to bill changes. Each of these changes include forecast inflation of 2% a year in line with current Treasury estimates. Please read the information about inflation below before continuing.

Inflation is the rate of increase in prices for goods and services over time and it is included in all utility bills. So, if inflation is 2% in 12 months time, 4 pints of milk which are £1 now will now cost £1.02. Bear in mind that your household income (e.g. wages, benefits, state pensions, etc.) also changes each year. If it keeps up with inflation then, all other things being equal, it will match the increase in the cost of goods and services. If your household income goes up by more than inflation each year, it will generally feel like it is going further. If it doesn't keep up with inflation, it may not feel as though it going as far as it used to.

[CAPI ONLY] Please note, if you would like to refer back to this information at any point, please ask your interviewer.

We would like you to imagine that it is now the year 2020 and you have just received your bill for water and sewerage services. Please answer the following question in terms of how you would feel based on the following…

Last year (2019) your bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your bill for the year is £[pull through with calculation based on current bill and 2020 formula].

DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WaSCs: ANGLIAN WATER, HAFREN DYFRDWY (POWYS), SEVERN TRENT, SOUTH WEST WATER, SOUTHERN WATER, THAMES WATER, UNITED UTILITIES, WESSEX WATER, YORKSHIRE WATER, WELSH WATER, NORTHUMBRIAN WATER

INFO PAGE

Q020.
Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)
How acceptable or unacceptable to you is the proposed change in your bill from 2019 to 2020? *Please choose one answer only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q021.
Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)

This screen is now showing how your bill could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE
Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P

Now, thinking about **how the bill changes each year** from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q022.
Base: WaSC customers only (Q02/1-12 - only include Q2/4 if also coding Q2a/2)

Thinking about the total bill increase/decrease of [INSERT TOTAL CHANGE FIGURE FROM Q20] from 2020 to 2025, how acceptable or unacceptable is this to you?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q023.
Base: All respondents who code 3 or 4 at any of Q19 / Q20 / Q21
You have said that one or more aspects of the bill change are unacceptable to you. Could you say why this is the case?
Please answer in the box below
OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
1		OPEN TEXT BOX	
85	Don't know/ can't say		

INFO3.
Base: WoC customers only (Q02/13-24 and Q03/1)
As you get your water and sewerage services from two different companies, we are going to ask you about the bill for each service separately. When answering these questions, please think about the charge for each service separately – we will ask you about the overall bill for both services later on.

The next set of questions are about proposed changes to your **water** bill from the years 2020 to 2025. You will be shown a number of different figures relating to bill changes. Each of these changes include

forecast inflation of 2% a year in line with current Treasury estimates. Please read the information about inflation below before continuing.

Inflation is the rate of increase in prices for goods and services over time and it is included in all utility bills. So, if inflation is 2% in 12 months time, 4 pints of milk which are £1 now will now cost £1.02. Bear in mind that your household income (e.g. wages, benefits, state pensions, etc.) also changes each year. If it keeps up with inflation then, all other things being equal, it will match the increase in the cost of goods and services. If your household income goes up by more than inflation each year, it will generally feel like it is going further. If it doesn't keep up with inflation, it may not feel as though it going as far as it used to.

[CAPI ONLY] Please note, if you would like to refer back to this information at any point, please ask your interviewer.

Thinking about your household bill for clean **water services**, we would like you to imagine that it is now the year 2020. Please answer the following question in terms of how you would feel based on the following…

Last year (2019) your bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your water bill for the year is £[pull through with calculation based on current bill and 2020 formula].

DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WoCs: AFFINITY WATER, BRISTOL WATER, CAMBRIDGE WATER, HAFREN DYFRDWY (WREXHAM), HARTLEPOOL WATER, PORTSMOUTH WATER, BOURNEMOUTH WATER, SOUTH EAST WATER, SOUTH STAFFORDSHIRE WATER, SUTTON & EAST SURREY WATER, ESSEX AND SUFFOLK WATER

INFO PAGE

Q024.
Base: WoC customers only (Q02/13-24 and Q03/1)
How acceptable or unacceptable to you is the proposed change in your water bill from 2019 to 2020?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q025.
Base: WoC customers only (Q02/13-24 and Q03/1)

This screen is now showing how your household bill for **water** could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE
Text to be pulled through based on their water bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P

Now, thinking about **how the water bill changes each year** , from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q026.
Base: WoC customers only (Q02/13-24 and Q03/1)
Thinking about the water bill increase/decrease of [INSERT TOTAL CHANGE FIGURE FROM Q24] from 2020 to 2025, how acceptable or unacceptable is this to you?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

INFO4.
Base: WoC customers only (Q02/13-24 and Q03/1)
Now, thinking just about the **sewerage** part of your bill, we would like you to imagine that it is now the year 2020. Please answer the following question in terms of how you would feel based on the following…

Last year (2019) your sewerage bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your sewerage bill for the year is £[pull through with calculation based on current bill and 2020 formula].

DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WoCs FOR THEIR SEWERAGE COMPANY: THAMES WATER, ANGLIAN WATER, SOUTHERN WATER, WESSEX WATER, WELSH WATER, NORTHUMBRIAN WATER, SEVERN TRENT

INFO PAGE

Q027.

Base: WoC customers only (Q02/13-24 and Q03/1)

How acceptable or unacceptable to you is the proposed change in your sewerage bill from 2019 to 2020?

Please choose one answer only

SINGLE RESPONSE

Q028. Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q029.

Base: WoC customers only (Q02/13-24 and Q03/1)

This screen is now showing how your household bill for **sewerage** could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE
Text to be pulled through based on their sewerage bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P

Now, thinking about **how the sewerage bill changes each year** , from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q030.

Base: WoC customers only (Q02/13-24 and Q03/1)

Thinking about the sewerage bill increase/decrease of [INSERT TOTAL CHANGE FIGURE FROM Q27] from 2020 to 2025, how acceptable or unacceptable is this to you?

Please choose one answer only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

INFO5.

Base: WoC customers only (Q02/13-24 and Q03/1)

You have just said how acceptable the water and sewerage parts of your bill will be to you. Now, we would like you to think about what your **combined water and sewerage** bill will look like and we would like you to imagine the following…

Last year (2019) your bill was £[pull through with calculation based on current bill and 2020 formula]. It's now 2020, and your water and sewerage bill for the year is £[pull through with calculation based on current bill and 2020 formula].

DP NOTE: AS PER QUESTION INSTRUCTION ONLY SHOW TO WoCs

INFO PAGE

Q031.

Base: WoC customers only (Q02/13-24 and Q03/1)

How acceptable or unacceptable to you is the proposed change in your combined water and sewerage bill from 2019 to 2020? *Please choose one answer only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q032.

Base: WoC customers only (Q02/13-24 and Q03/1)

This screen is now showing how your combined household bill for **water and sewerage** could change each year until 2025.

	2020	2021	2022	2023	2024	2025	TOTAL CHANGE

Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p	2025 £.p – 2020 £.P

Now, thinking about **how the combined bill for water and sewerage changes each year** , from 2020 to 2025, how acceptable or unacceptable is this to you? *Please choose one answer only*
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q033.
Base: WoC customers only (Q02/13-24 and Q03/1)
Thinking about the total bill increase/decrease of [INSERT TOTAL CHANGE FIGURE FROM Q30] from 2020 to 2025, how acceptable or unacceptable is this to you?
Please choose one answer only
SINGLE RESPONSE

Q034. Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q035.
Base: All respondents who code 3 or 4 at any of Q29 / Q30 / Q31

You've said that one or more aspects of the bill change are unacceptable to you. Could you say why this is the case?
Please answer in the box below
OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
1		OPEN TEXT BOX	
85	Don't know/ can't say		

INFORMED ACCEPTABILITY

INFO6.

Base: All respondents

Now we are going to show you how your water and sewerage services could change from 2020 to 2025. We would like to know how acceptable or unacceptable the proposed service changes are to you.

So, the next questions are about the **services** provided by <WaSCs: ANSWER GIVEN AT Q2> / <WoCs: ANSWER GIVEN AT Q2 which provides your water supply and ANSWER GIVEN AT Q4 which provides your sewerage services>.

When answering questions, please bear in mind that because you are charged for two services i.e. for water and for sewerage, you will be asked to consider these individually as there are different service levels and prices for each.

The information on the following pages shows the different water services provided by [ANSWER GIVEN AT Q2], and what they plan to improve or maintain between 2020 and 2025. Please note that the investment details shown are a snapshot of the proposals; if there is no detail shown it doesn't mean that the company isn't investing in that area.

The table also shows the total price change starting with the 2020 bill through to 2025, including inflation. When considering the price please bear in mind that your household income and inflation will also change over the next 5 years.

INFO PAGE

Q036.

Base: All respondents

DP: SHOWCARD A [WATER SUPPLY PLANS FOR 2020-2025]

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their individual water bill amount	£.p	£.p	£.p	£.p	£.p	£.p

Bearing in mind the investment and service levels that go with this, how acceptable or unacceptable do you think the proposed price changes are for the **water** services? *Please choose one answer only*

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q037.

Base: All respondents who code 3 or 4 at Q33

What are the two main reasons that you feel the proposals for your water services are unacceptable?

Please choose up to two answers only

MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST

Code	Answer list	Scripting notes	Routing
1	Already too expensive/it will still be too expensive		
2	Company profits too high		
3	Generally, expect bigger service improvements		
4	Companies should pay for service improvements out of their profits		
5	I expect better improvements for these prices		
6	The plan is poor value for money		
7	Compared to energy prices it is more expensive		
8	I am dissatisfied with current services & expected greater improvements		
9	Because of the price increases	ONLY SHOW IF BILL INCREASES	
10	Their plans don't focus on the right services		
11	I expect better improvements for these prices because Dŵr Cymru Welsh Water has no shareholders and therefore there should be more money to re-invest in the services	ONLY SHOW TO Q02/3 [WELSH WATER]	
12	I won't be able to afford this		
13	I don't trust them to make these service improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

Q038.

Base: All respondents who code 1 or 2 at Q33

What are the two main reasons that you feel the proposals for your water supply are acceptable?

Please choose up to two answers only
MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST

Code	Answer list	Scripting notes	Routing
1	The plan is good value for money		
2	Compared to energy prices it's cheaper		
3	Their plans seem to focus on the right services		
4	The company provides a good service now and it looks as if it will continue		
5	I support what they are trying to do in the long term		
6	There is little or no change to my bill		
7	I don't really understand it but I trust them to do what's best for customers		
8	I have been dissatisfied with the service recently but am pleased that they are making improvements		
9	Because of the price decreases	ONLY SHOW IF BILL DECREASES	
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

INFO6.
Base: All respondents
The following pages show the different sewerage services provided by [ANSWER GIVEN AT Q4], and what they plan to improve or maintain between 2020 and 2025. Please note that the investment details shown are a snapshot of the proposals; if there is no detail shown it doesn't mean that the company isn't investing in that area.

The table also shows the total price change starting with the 2020 bill through to 2025, including inflation. When considering the price please bear in mind that your household income and inflation will also change over the next 5 years.

INFO PAGE

Q039.
Base: All respondents
DP: SHOWCARD B [WATER SEWERAGE & OTHER SERVICES PLANS FOR 2020-2025]

	2020	2021	2022	2023	2024	2025

Text to be pulled through based on their individual sewerage bill amount	£.p	£.p	£.p	£.p	£.p	£.p

Bearing in mind the investment and service levels that go with this, how acceptable or unacceptable do you think the proposed price changes are for **sewerage** services?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q040.
Base: All respondents who code 3 or 4 at Q36
What are the two main reasons that you feel the proposals for your sewerage services are unacceptable?
Please choose up to two answers only

MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST

Code	Answer list	Scripting notes	Routing
1	Already too expensive/it will still be too expensive		
2	Company profits too high already		
3	Generally, expect bigger service improvements		
4	The company should be investing in their services as well as customers		
5	I expect better improvements for these prices		
6	The plan is poor value for money		
7	Compared to energy prices it is more expensive		
8	I am dissatisfied with current services & expected greater improvements		
9	Because of the price increases	ONLY SHOW IF BILL INCREASES	
10	Their plans don't focus on the right services		

11	I won't be able to afford this		
12	I don't trust them to make these service improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

Q041.

Base: All respondents who code 1 or 2 at Q36

What are the two main reasons that you feel the proposals for your sewerage services are acceptable?
Please choose up to two answers only

MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST

Code	Answer list	Scripting notes	Routing
1	The plan is good value for money		
2	Compared to energy prices it's cheaper		
3	Their plans seem to focus on the right things		
4	The company provide a good service now and it looks as if it will continue		
5	I support what they are trying to do in the long term		
6	There is little or no change to my bill		
7	I don't really understand it but I trust them to do what's best for customers		
8	I have been dissatisfied with the service recently but am pleased that they are making improvements		
9	Because of the price increases	ONLY SHOW IF BILL INCREASES	
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

INFO7.

Base: All respondents

WaSCs only

Now you have seen all the proposed service changes for your water and sewerage services, we want to tell you that there are also some service changes relating to customer services and other specific services that need to be taken into account.

WoCs only
Now you have seen all the proposed service changes for your water and sewerage services, we want to tell you that there are also some service changes relating to customer services and other specific services that need to be taken into account.

All respondents
Changes to these services *are shown on the following pages.*

INFO PAGE

Q042.
Base: All respondents
DP: SHOWCARD C [OTHER SERVICES FOR 2020-2025] ALONG WITH PRICE CHANGES FOR 2020-2025

Please review the proposed price changes for the combined water and sewerage bill.

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p

Bearing in mind the investment and service levels that go with this, how acceptable or unacceptable do you think the proposed price changes are for water and sewerage services?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q043.
Base: All respondents who code 3 or 4 at Q39
What are the two main reasons that you feel the proposals for your water and sewerage services are unacceptable?
Please choose up to two answers only
MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST

Code	Answer list	Scripting notes	Routing
1	Already too expensive/it will still be too expensive		

2	Company profits too high already		
3	Generally, expect bigger service improvements		
4	The company should be investing in their services as well as customers		
5	I expect better improvements for these prices		
6	The plan is poor value for money		
7	Compared to energy prices it is more expensive		
8	I am dissatisfied with current services and expected greater improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

Q044.

Base: All respondents who code 1 or 2 at Q39

What are the two main reasons that you feel the proposals for your water and sewerage services are acceptable?

Please choose up to two answers only

MULTI RESPONSE UP TO A MAXIMUM OF TWO. ROTATE LIST

Code	Answer list	Scripting notes	Routing
1	The plan is good value for money		
2	Compared to energy prices it's cheaper		
3	Their plans seem to focus on the right things		
4	The company provide a good service now and it looks as if it will continue		
5	I support what they are trying to do in the long term		
6	There is little or no change to my bill		
7	I don't really understand it but I trust them to do what's best for customers		
8	I have been dissatisfied with the service recently but am pleased that they are making improvements		
80	Other 1 – (please specify)	OPEN TEXT BOX, FIXED	
81	Other 2 – (please specify)	OPEN TEXT BOX, FIXED	
85	Don't know/ can't say	EXCLUSIVE, FIXED	

Q045.
Base: All WaSC respondents (Q02/1_12)

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their individual bill amount	£.p	£.p	£.p	£.p	£.p	£.p

How much do you agree or disagree that the proposed water and sewerage charges from 2020 to 2025 are affordable to you?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

Q046.
Base: All WoC respondents (Q02/13_24 OR Q03/1)

	2020	2021	2022	2023	2024	2025
Text to be pulled through based on their total bill amount	£.p	£.p	£.p	£.p	£.p	£.p

How much do you agree or disagree that the proposed **combined water and sewerage charges** (i.e. your total bill amount) from 2020 to 2025 are affordable to you?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

ODI Section

Q047.
Base: All WaSC respondents (Q01/12)

We have just shown you the baseline service plan and charges proposed for your water and sewerage services from 2020 to 2025.

Sometimes, the level of service customers get is different to this baseline plan. It could be lower than in the plan, for example, because extreme weather affected water supplies or caused flooding, or the service level could end up being better because new technology means the company has become more efficient. By 2022, it will be clear whether your company is providing a service which is better or worse than planned, and your bill could change to reflect this.
SHOWCARD D

If [insert water company from Q02/1-12] **did not meet any of these service levels**, and gave you notably lower service levels than in their plan, your annual water and sewerage bill from 2022 onwards, including inflation, would go down by up to £xxx.

On the other hand, if [insert water company from Q02/1-12] **exceeds all of these service levels** to give you notably better service levels than in their plan, your annual water and sewerage bill from 2022, including inflation, would go up, by up to £xxx.

In practice, it's unlikely that your company would either miss all of it's service level targets, or exceed them all. Experience is that companies miss some, beat others, or are so close to the planned service level that it makes no change to the bill. So it's more likely that your bill would end up being **closer to the middle rather than at the bottom of the range ([pull through from bottom]) or at the top ([pull through from top]).**

Thinking about this, could you please state how acceptable or unacceptable the potential bill for lower and higher service levels is to you? Please remember that your household income will also change over the five years from 2020 to 2025 – it may change in line with inflation, by less than inflation, or increase by more than inflation.
SINGLE RESPONSE

Q048. Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q049.
Base: All respondents who code 1-4 at Q044
Why do you say that? Please choose as many of the options below that fit your view
MULTI RESPONSE

Code	Answer list	Scripting notes	Routing

1	The bill should be fixed and not be open to change as services change	Only show if coding 3-4 @ Q44	
2	I disagree that bills should be linked with service performance	Only show if coding 3-4 @ Q44	
3	The company should be penalised in other ways if they under achieve on services	Only show if coding 3-4 @ Q44	
4	The company should be rewarded in other ways if they over achieve on services	Only show if coding 3-4 @ Q44	
5	It's good that the bill can reflect the level of service provided	Only show if coding 1-2 @ Q44	
6	It's good because this should help get even better service improvements because companies will try harder	Only show if coding 1-2 @ Q44	
7	Uncertainty about how the bill could change each year makes budgeting for it difficult and I don't know if I'll able to afford it	Only show if coding 3-4 @ Q44	
8	Other – please write in		
85	Don't know		

Q050.
Base: All WoC respondents (Q02/13-24 OR Q03/1)

We have already shown you the baseline service plan and charges proposed for your water services starting from the next bill in 2020 through to 2025.

Sometimes, the level of service customers get ends up being different to what has been planned. Performance against targets could end up being worse, for example, because extreme weather affected water supplies or caused flooding, or could end up being better because new technology means the company has become more efficient. By 2022, it will be clear whether your company is providing a service which is better or worse than planned, and your bill could change to reflect this.
SHOWCARD D

If [insert water company from Q02/13-22 or 24 OR Q02a/1] **did not meet any of these service levels**, and gave you notably lower service levels than in their plan, your annual water bill from 2022 onwards, including inflation, would go down by up to £xxx.

On the other hand, if [insert water company from Q02/13-22 or 24 OR Q02a/1] **exceeds all of these service levels** to give you notably better service levels than in their plan, your annual water bill from 2022, including inflation, would go up by up to £xxx.

In practice, it's unlikely that your company would either miss all of it's service level targets, or exceed them all. Experience is that companies miss some, beat others, or are so close to the planned service

level that it makes no change to the bill. So it's more likely that your bill would end up being towards the middle of this range than at the bottom or top.

Thinking about this, could you please state how acceptable or unacceptable this potential range that your bill could fall into is to you as a customer? Please remember that your household income will also change over the five years from 2020 to 2025. If it keeps up with inflation it should match the increase in cost of goods and services over time.

TEXT FOR SOUTH STAFFORDSHIRE WATER CUSTOMERS ONLY (Q02/23)

If South Staffordshire Water did not meet any of these service levels, and gave you notably lower service levels than in their plan, your water bill, including inflation, could go down. On the other hand, if they exceeded all of these service levels and gave you notably better service levels than in their plan, your water bill could go up to reflect this higher level of service. Your bill could increase by up to £2.50 a year, and go down by up to £3 a year

However, South Staffordshire Water propose to keep their water bills the same from 2020 to 2025 and apply any difference in the bills they could have charged from 2026 onwards – which will depend on how good their service performance was from 2020-2025. So from 2020-2025, the average household water bill will be unchanged, regardless of performance and the effect of inflation, at £xxx

Thinking about this, could you please state how acceptable or unacceptable this is to you?
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q051.
Base: All respondents who code 1-4 at Q046
Why do you say that? Please choose as many of the options below that fit your view

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	The bill should be fixed and not be open to change as services change	Only show if coding 3-4 @ Q46	
2	I disagree that bills should be linked with service performance	Only show if coding 3-4 @ Q46	
3	The company should be penalised in other ways if they under achieve on services	Only show if coding 3-4 @ Q46	

4	The company should be rewarded in other ways if they over achieve on services	Only show if coding 3-4 @ Q46	
5	It's good that the bill can reflect the level of service provided	Only show if coding 1-2 @ Q46	
6	It's good because this should help get even better service improvements because companies will try harder	Only show if coding 1-2 @ Q46	
7	Uncertainty about how the bill could change each year makes budgeting for it difficult and I don't know if I'll able to afford it	Only show if coding 3-4 @ Q46	
8	I'd worry that saving up all these bill changes until 2026 might have a big effect on the bill	Only show if code 23 @ Q03 (South Staffs Water)	
9	I'd prefer the bill to be flat for a few years, and for it to change from 2026 onwards than for it to change each year	Only show if code 23 @ Q03 (South Staffs Water)	
86	Other – please write in		
85	Don't know		

Q052.
Base: All WoC respondents (Q02/13-24 OR Q03/1)

We have already shown you the baseline service plan and charges proposed for your sewerage starting from your bill in 2020 through to 2025.
Sometimes, the level of service customers get ends up being different to what has been planned. Performance against targets could end up being worse, for example, because extreme weather affected water supplies or caused flooding, or could end up being better because new technology means the company has become more efficient. By 2022, it will be clear whether your company is providing a service which is better or worse than planned, and your bill could change to reflect this.

SHOWCARD D - VISUAL EXAMPLE HERE

If [insert sewerage company from Q03] **did not meet any of these service levels**, and gave you notably lower service levels than in their plan, your annual sewerage bill from 2022 onwards, including inflation, would go down by up to £xxx.

On the other hand, if [insert sewerage company from Q03] **exceeds all of these service levels** to give you notably better service levels than in their plan, your annual sewerage bill from 2022, including inflation, would go up by up to £xxx.

In practice, it's unlikely that your company would either miss all of it's service level targets, or exceed them all. Experience is that companies miss some, beat others, or are so close to the planned service level that it makes no change to the bill. So, it's more likely that your bill would end up being towards the middle of this range than at the bottom or top.

Thinking about this, could you please state how acceptable or unacceptable this potential range that your bill could fall into is to you as a customer? Please remember that your household income will also change over the five years from 2020 to 2025. If it keeps up with inflation it should match the increase in cost of goods and services over time.

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Completely acceptable		
2	Acceptable		
3	Unacceptable		
4	Completely unacceptable		
85	Don't know/ can't say		

Q053.

Base: All respondents who code 1-4 at Q048

Why do you say that? Please choose as many of the options below that fit your view

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	The bill should be fixed and not be open to change as services change	Only show if coding 3-4 @ Q48	
2	I disagree with linking bills to company service performance	Only show if coding 3-4 @ Q48	
3	The company should be penalised in other ways if they under achieve on services	Only show if coding 3-4 @ Q48	
4	The company should be rewarded in other ways if they over achieve on services	Only show if coding 3-4 @ Q48	
5	It's good that the bill can reflect the level of service provided	Only show if coding 1-2 @ Q48	
6	It's good because this should help get even better service improvements as companies will try harder	Only show if coding 1-2 @ Q48	
7	Uncertainty about how the bill could change each year makes budgeting for it difficult and I don't know if I'll able to afford it	Only show if coding 3-4 @ Q48	
8	I'd worry that saving up all these bill changes until 2026 might have a big effect on the bill	Only show if code 23 @ Q03 (South Staffs Water)	
9	I'd prefer the bill to be flat for a few years, and for it to change from 2026 onwards than for it to change each year	Only show if code 23 @ Q03 (South Staffs Water)	
86	Other – please write in		
85	Don't know		

Q054.

Base: All respondents

To what extent do you agree or disagree with each of the following statements about inflation and household bills?

Please choose one answer only per statement

SINGLE RESPONSE PER STATEMENT, GRID, RANDOMISE ORDER OF STATEMENTS

Code	Row	Scripting notes	Routing
1	I accept that all my household bills automatically include inflation		
2	Generally, my income doesn't keep up with changes in inflation		
3	Changes in the inflation rate aren't a particular concern for me		
4	I don't think about the effect of inflation on my bills		
5	I know that all of my bills change by inflation over time		
6	I think it's hard to predict what level inflation is going to reach in the next few years		

Code	Column	Scripting notes	Routing
1	Strongly agree		
2	Tend to agree		
3	Neither agree nor disagree		
4	Tend to disagree		
5	Strongly disagree		
85	Don't know		

Q055.

Base: All respondents

And looking ahead, how likely do you think it is that your household income is generally going to keep up with changes in inflation on household bills, food, entertainment etc. over the next 5 years?

Please choose one answer only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very likely		
2	Fairly likely		
3	Neither likely nor unlikely		
4	Fairly unlikely		
5	Very unlikely		
85	Don't know		

Q056.

Base: All respondents
Why do you say that?
Please answer in the box below
OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
		OPEN TEXT BOX	
85	Don't know		

Q057.
Base: All respondents
Which of the following best describes your financial position?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	I do not have problems paying my water bill		
2	It is difficult to pay my bill but I always pay it on time		
3	It is difficult to pay my bill and I sometimes pay it late		
4	It is difficult to pay my bill and I never pay it on time		
85	Don't know		
86	I would rather not say		

Q058.
Base: All respondents
We would like to make sure that we take account of the views of people of all incomes. Could you tell me which of the following income bands your household falls into?
Please take account of the income of all those in the household (before tax and national insurance) and include any pensions, benefits or extra earnings
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Less than £10,000		
2	£10,000 to £19,999		
3	£20,000 to £29,999		
4	£30,000 to £39,999		
5	£40,000 to £49,999		
6	£50,000 to £74,999		
7	£75,000 to £99,999		
8	£100,000 or more		

85	Don't know		
86	Prefer not to say		

Q059.

Base: All respondents

Including yourself, how many adults, i.e. 18 years or over, are there in your household? And how many children, i.e. under 18 years old and under 5 years, are there in your household?

SINGLE RESPONSE GRID

Code	List	Scripting notes	Routing
1	Adults (i.e. people aged 18 or over)	MINIMUM ONE @ ANSWER LIST	
2	Children aged 6-17		
3	Children aged 0-5		

Code	Answer list	Scripting notes	Routing
1	None		
2	One		
3	Two		
4	Three		
5	Four		
6	Five or more		
86	Prefer not to say		

Q060.

Base: All respondents

Could you please tell me which, if any, of the following disabilities, conditions or life events you or someone in your household may be experiencing?

Please choose as many as apply

MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Serious/ Chronic Illness		
2	Poor mobility e.g. physical impairment, restricted movement		
3	Blind/partially sighted/ have a hearing difficulty		
4	Communication/speech difficulties		
5	Have dementia, cognitive impairment, loss of mental capacity (due to injury or illness) or a developmental condition		
6	Have a mental health condition/mental disability or chronic anxiety/depression		
7	Temporarily recovering after being in hospital or having an operation		

8	Recovering after a traumatic event (e.g a bereavement, recent child birth, divorce, loss of job or other stressful event)		
9	Recovering after an accident, injury or serious illness		
10	Living with an alcohol or substance addition/abuse		
11	High water use due to a medical condition (e.g. kidney dialysis, skin conditions etc)		
80	Other (*please write in here in as much detail as you are comfortable supplying*)		
87	Do not suffer with any disabilities	EXCLUSIVE	
85	Don't know	EXCLUSIVE	
86	Prefer not to say	EXCLUSIVE	

Q061.

Base: All respondents

Are you on your water company's Priority Services Register? Priority services registers hold information about customers' needs for services like large print bills, or passwords, and also so that if there is a problem with their water supply, their supplier will know if they need bottled water, for example for a medical condition or if they can't get to a bottled water station.

Please select one response only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
86	Prefer not to say		

Q062.

Base: All respondents

Have you experienced any issues with the water and sewerage services at your home which have affected your responses to this survey? *Please select one response only*

Please select one response only

SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
86	Prefer not to say		

Q063.

Base: All code 2 at Q058

What were these experiences? *Please select one response only*

Please select as many as apply
MULTI RESPONSE

Code	Answer list	Scripting notes	Routing
1	Loss of water supply		
2	Inaccurate bills/meter readings		
3	Poor customer service		
4	Problems with sewerage/drainage services		
	Other - specify		
86	Prefer not to say		

Q064.
Base: All respondents
We are interested to know how easy to understand you found the information you have been presented with today.
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Very easy to understand		
2	Quite easy to understand		
3	Quite difficult to understand		
4	Very difficult to understand		
85	Don't know		

Q065.

Base: All respondents saying they don't understand (Q60/3-4)

What didn't you understand? Please provide as much detail as you can. *Please answer in the box below*

OPEN RESPONSE

Code	Answer list	Scripting notes	Routing
		OPEN TEXT BOX	
85	Don't know		

Q066.

Base: All respondents
Do you have any further comments on anything you have read during this survey?
Please answer in the box below

OPEN RESPONSE

Q067. Code	Answer list	Scripting notes	Routing
		OPEN TEXT BOX	
85	Don't know		

Q068.
Base: CAPI only
Would you like to receive invitations to take part in future customer research from CCWater[17]?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		

Q069.
Base: all respondents
What is your postcode? (Please note: your postcode like all the information you have provided in the questionnaire will remain strictly confidential and will be used for analysis purposes only. If you would prefer, you can provide only the first part of your postcode eg. LS16).
OPEN RESPONSE

Q070. Code	Answer list	Scripting notes	Routing
		OPEN TEXT BOX	
85	Prefer not to say		

Q071.
Base: CAPI only
And finally, have you taken part in research on behalf of your water company in the past year, excluding this survey today?
Please choose one answer only
SINGLE RESPONSE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		

THANK YOU FOR YOUR HELP IN THIS RESEARCH

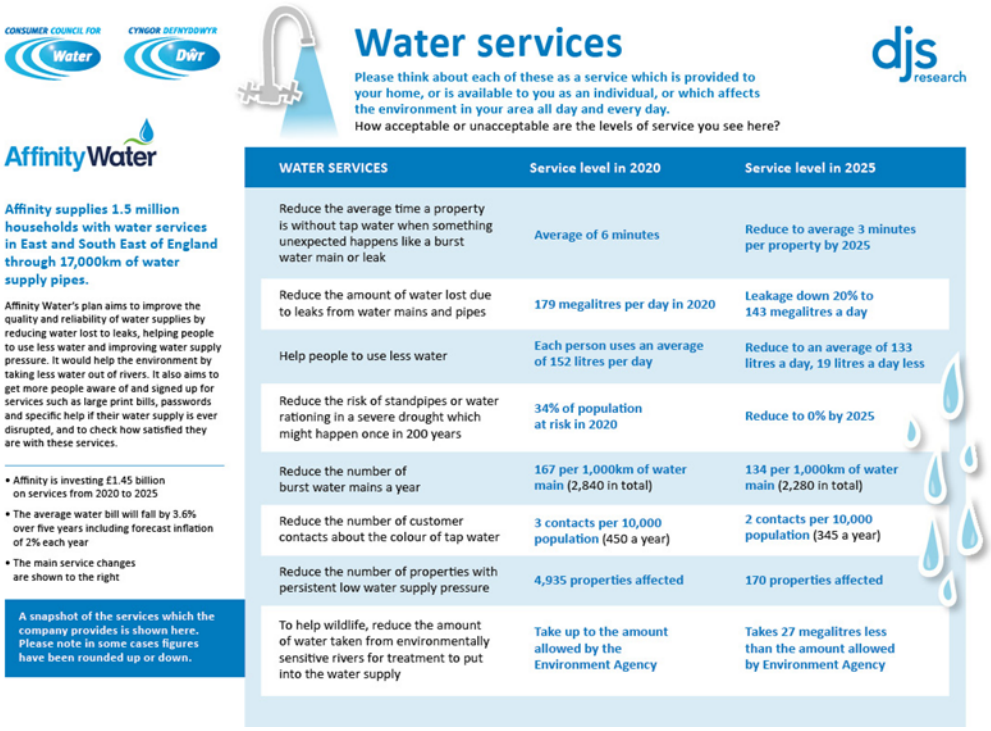
This research was conducted under the terms of the Market Research Society (MRS) code of conduct and is completely confidential. If you would like to confirm the Researchers credentials please call the MRS free on 0500 396999.

[17] Since the this survey was conducted, CCWater has rebranded to CCW.

We would be grateful if you could provide your name and telephone number for quality control purposes. Please note that these will only be used by our quality control team and will not be passed onto any third parties.

15. Appendix 3 – showcards

Figure 55: Affinity Water



Affinity sewerage: Southern Water

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

Southern Water

While Affinity supplies your water service, sewerage services are provided by Southern Water, which provides services through 39,700km of sewers and drains across its sewerage service area.

Southern Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (398 in total)	1.3 homes in 10,000 affected (284 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	58 per 10,000km of sewers (231 in total)	54.8 per 10,000km of sewers (225 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	32.5 pollution incidents per 10,000km sewers (130 in total)	19.5 pollution incidents per 10,000km sewers (80 in total)
Reduce sewage flooding of gardens or outbuildings	5,040 occasions a year	3,525 a year, a fall of 30%
Ensure that 'Excellent' bathing water quality is maintained at all beaches where the Environment Agency has given this rating	57 beaches with bathing waters designated as 'Excellent'	57 beaches with bathing waters designated as 'Excellent'
Increase the number of beaches with bathing water rated by the Environment Agency as 'Excellent'	57 out of 83 beaches with bathing waters designated as 'Excellent'	59 out of 83 beaches with bathing waters designated as 'Excellent'
Improve bathing water at these 5 beaches to 'Good' quality as rated by the Environment Agency: Broadstairs Viking Bay, Littlestone, Lancing Beach Green, Hastings Pelham Beach and Felpham	0 out of these 5 are rated 'Good'	All 5 are rated 'Good'

Affinity sewerage: Anglian Water

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

love every drop anglianwater

While Affinity supplies your water service, sewerage services are provided by Anglian Water, which provides services through 77,000km of sewers and drains across its sewerage service area.

Anglian Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	1.7 homes in 10,000 affected (357 in total)	1.3 homes in 10,000 affected (295 in total)
Keep the number of collapsed sewers at a steady level	61 per 10,000km of sewers (464 in total)	55 per 10,000km of sewers (424 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	29 pollution incidents per 10,000km sewers (219 in total)	20 pollution incidents per 10,000km sewers (154 in total)
Reduce sewage flooding of gardens, outbuildings or public spaces	4,240 occasions a year	3,990 a year, a fall of 6%
Increase the number of beaches with bathing water rated by the Environment Agency as 'Excellent'	33 out of 49 beaches with bathing waters designated as 'Excellent'	36 out of 49 beaches with bathing waters designated as 'Excellent'

Affinity sewerage: Thames Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While Affinity supplies your water service, sewerage services are provided by Thames Water, which provides services through 109,000km of sewers and drains across its sewerage service area.

Thames Water's plan for sewerage services aims to reduce flooding from sewers and help the water environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (1,244 in total)	1 home in 10,000 affected (800 in total)
Maintain the number of collapsed sewers per 10,000km of sewer at a steady level	40 per 10,000km of sewers (437 in total)	40 per 10,000km of sewers (437 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	28 pollution incidents per 10,000km sewers (306 in total)	19.5 pollution incidents per 10,000km sewers (213 in total)

Other services

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

Affinity supplies 1.5 million households with water services in East and South East of England through 17,000km of water supply pipes.

Affinity Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would help the environment by taking less water out of rivers. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted, and to check how satisfied they are with these services.

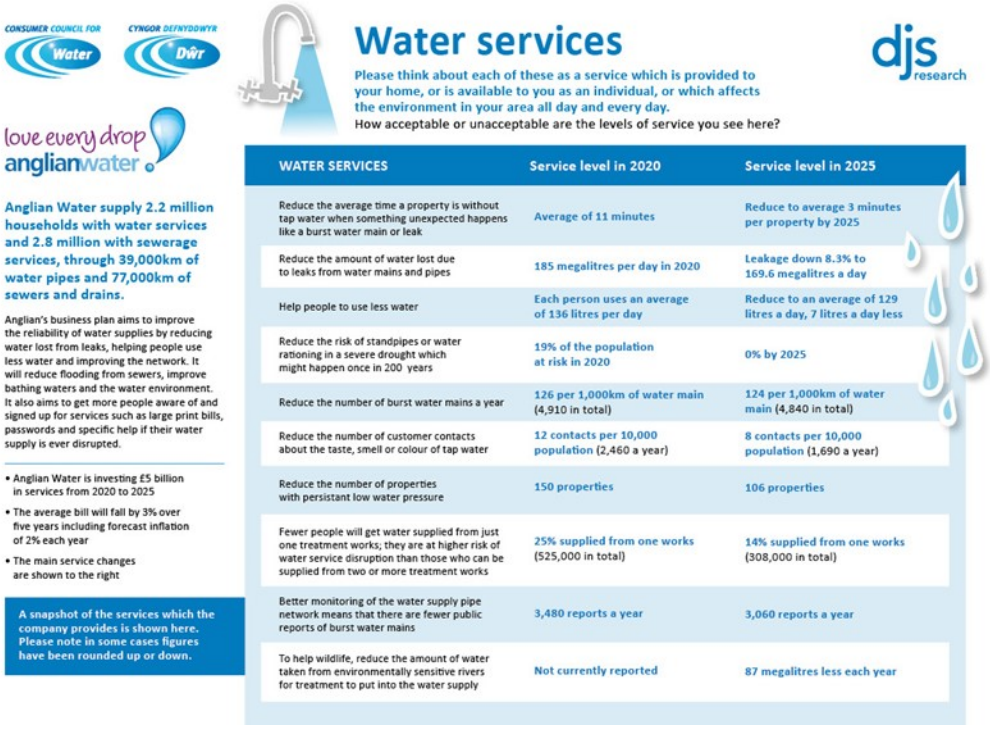
- Affinity is investing £1.45 billion on services from 2020 to 2025
- The average water bill will fall by 3.6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2% of households are signed up	7.2% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	83% of records are checked	90% of records are checked
Ensure that customers who, for example, are struggling with bills or who get Priority Services are satisfied with these services	Not currently measured	90% satisfied – as found by an independent survey

Figure 56: Anglian Water



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

love every drop anglianwater

Anglian Water supply 2.2 million households with water services and 2.8 million with sewerage services, through 39,000km of water pipes and 77,000km of sewers and drains.

Anglian's business plan aims to improve the reliability of water supplies by reducing water lost from leaks, helping people use less water and improving the network. It will reduce flooding from sewers, improve bathing waters and the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Anglian Water is investing £5 billion in services from 2020 to 2025
- The average bill will fall by 3% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

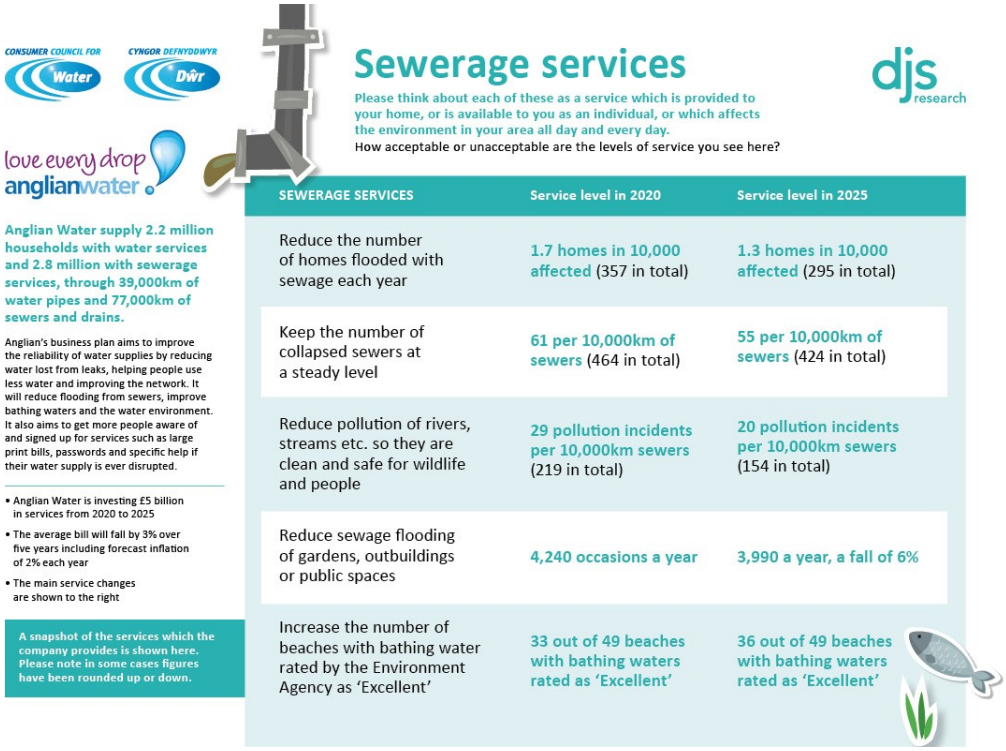
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 11 minutes	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	185 megalitres per day in 2020	Leakage down 8.3% to 169.6 megalitres a day
Help people to use less water	Each person uses an average of 136 litres per day	Reduce to an average of 129 litres a day, 7 litres a day less
Reduce the risk of standpipes or water rationing in a severe drought which might happen once in 200 years	19% of the population at risk in 2020	0% by 2025
Reduce the number of burst water mains a year	126 per 1,000km of water main (4,910 in total)	124 per 1,000km of water main (4,840 in total)
Reduce the number of customer contacts about the taste, smell or colour of tap water	12 contacts per 10,000 population (2,460 a year)	8 contacts per 10,000 population (1,690 a year)
Reduce the number of properties with persistant low water pressure	150 properties	106 properties
Fewer people will get water supplied from just one treatment works; they are at higher risk of water service disruption than those who can be supplied from two or more treatment works	25% supplied from one works (525,000 in total)	14% supplied from one works (308,000 in total)
Better monitoring of the water supply pipe network means that there are fewer public reports of burst water mains	3,480 reports a year	3,060 reports a year
To help wildlife, reduce the amount of water taken from environmentally sensitive rivers for treatment to put into the water supply	Not currently reported	87 megalitres less each year



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

love every drop anglianwater

Anglian Water supply 2.2 million households with water services and 2.8 million with sewerage services, through 39,000km of water pipes and 77,000km of sewers and drains.

Anglian's business plan aims to improve the reliability of water supplies by reducing water lost from leaks, helping people use less water and improving the network. It will reduce flooding from sewers, improve bathing waters and the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Anglian Water is investing £5 billion in services from 2020 to 2025
- The average bill will fall by 3% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

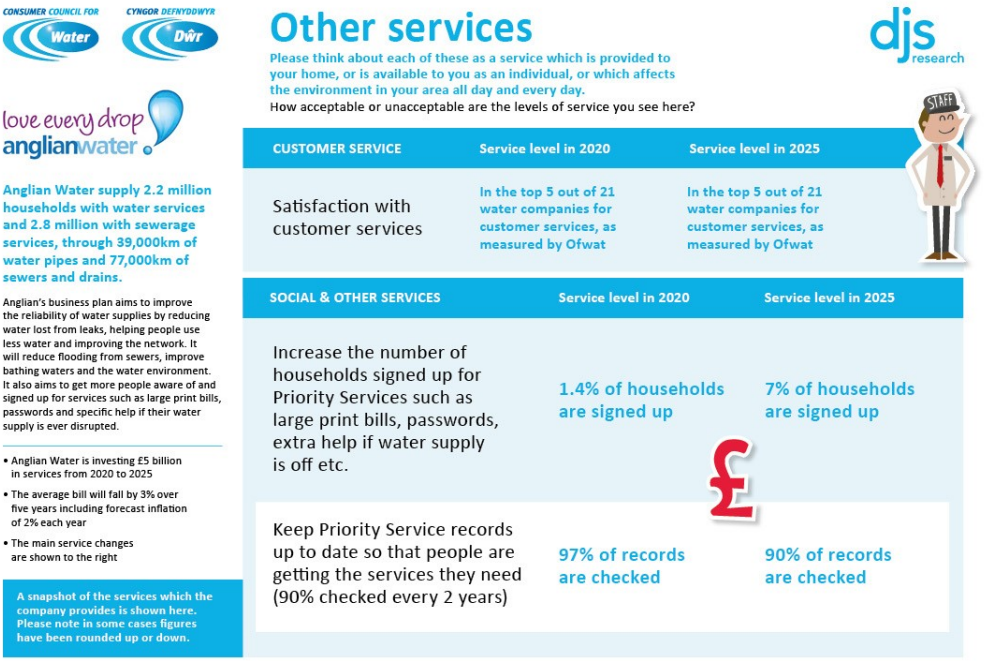
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Sewerage services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	1.7 homes in 10,000 affected (357 in total)	1.3 homes in 10,000 affected (295 in total)
Keep the number of collapsed sewers at a steady level	61 per 10,000km of sewers (464 in total)	55 per 10,000km of sewers (424 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	29 pollution incidents per 10,000km sewers (219 in total)	20 pollution incidents per 10,000km sewers (154 in total)
Reduce sewage flooding of gardens, outbuildings or public spaces	4,240 occasions a year	3,990 a year, a fall of 6%
Increase the number of beaches with bathing water rated by the Environment Agency as 'Excellent'	33 out of 49 beaches with bathing waters rated as 'Excellent'	36 out of 49 beaches with bathing waters rated as 'Excellent'



Other services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	1.4% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	97% of records are checked	90% of records are checked

love every drop anglianwater

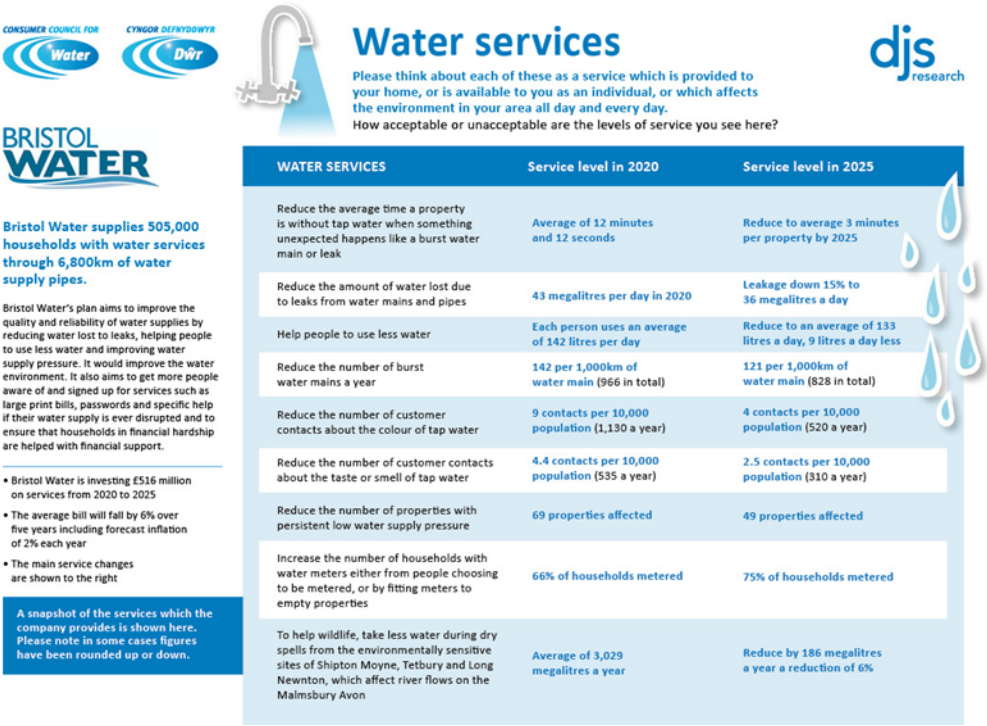
Anglian Water supply 2.2 million households with water services and 2.8 million with sewerage services, through 39,000km of water pipes and 77,000km of sewers and drains.

Anglian's business plan aims to improve the reliability of water supplies by reducing water lost from leaks, helping people use less water and improving the network. It will reduce flooding from sewers, improve bathing waters and the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Anglian Water is investing £5 billion in services from 2020 to 2025
- The average bill will fall by 3% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Figure 57: Bristol Water



Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 12 minutes and 12 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	43 megalitres per day in 2020	Leakage down 15% to 36 megalitres a day
Help people to use less water	Each person uses an average of 142 litres per day	Reduce to an average of 133 litres a day, 9 litres a day less
Reduce the number of burst water mains a year	142 per 1,000km of water main (966 in total)	121 per 1,000km of water main (828 in total)
Reduce the number of customer contacts about the colour of tap water	9 contacts per 10,000 population (1,130 a year)	4 contacts per 10,000 population (520 a year)
Reduce the number of customer contacts about the taste or smell of tap water	4.4 contacts per 10,000 population (535 a year)	2.5 contacts per 10,000 population (310 a year)
Reduce the number of properties with persistent low water supply pressure	69 properties affected	49 properties affected
Increase the number of households with water meters either from people choosing to be metered, or by fitting meters to empty properties	66% of households metered	75% of households metered
To help wildlife, take less water during dry spells from the environmentally sensitive sites of Shipton Moyne, Tetbury and Long Newnton, which affect river flows on the Malmsbury Avon	Average of 3,029 megalitres a year	Reduce by 186 megalitres a year a reduction of 6%

BRISTOL WATER

Bristol Water supplies 505,000 households with water services through 6,800km of water supply pipes.

Bristol Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted and to ensure that households in financial hardship are helped with financial support.

- Bristol Water is investing £516 million on services from 2020 to 2025
- The average bill will fall by 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Bristol Water sewerage: Wessex Water

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While Bristol Water supplies your water service, sewerage services are provided by Wessex Water, which provides services through 35,000km of sewers and drains across its sewerage service area.

Wessex Water's plan for sewerage services aims to reduce flooding from sewers and help the water environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	1.6 homes in 10,000 affected (200 in total)	1.3 homes in 10,000 affected (167 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	181 per 10,000km of sewers (634 in total)	130 per 10,000km of sewers (455 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	22 pollution incidents per 10,000km sewers (77 in total)	19.5 pollution incidents per 10,000km sewers (68 in total)
Reduce sewage flooding of gardens or outbuildings	2,180 occasions a year	1,960 a year, a fall of 10%
Supporting or creating community projects at beaches to improve the experience of beach users	14 beaches	47 beaches

Other services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

Bristol Water supplies 505,000 households with water services through 6,800km of water supply pipes.

Bristol Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted and to ensure that households in financial hardship are helped with financial support.

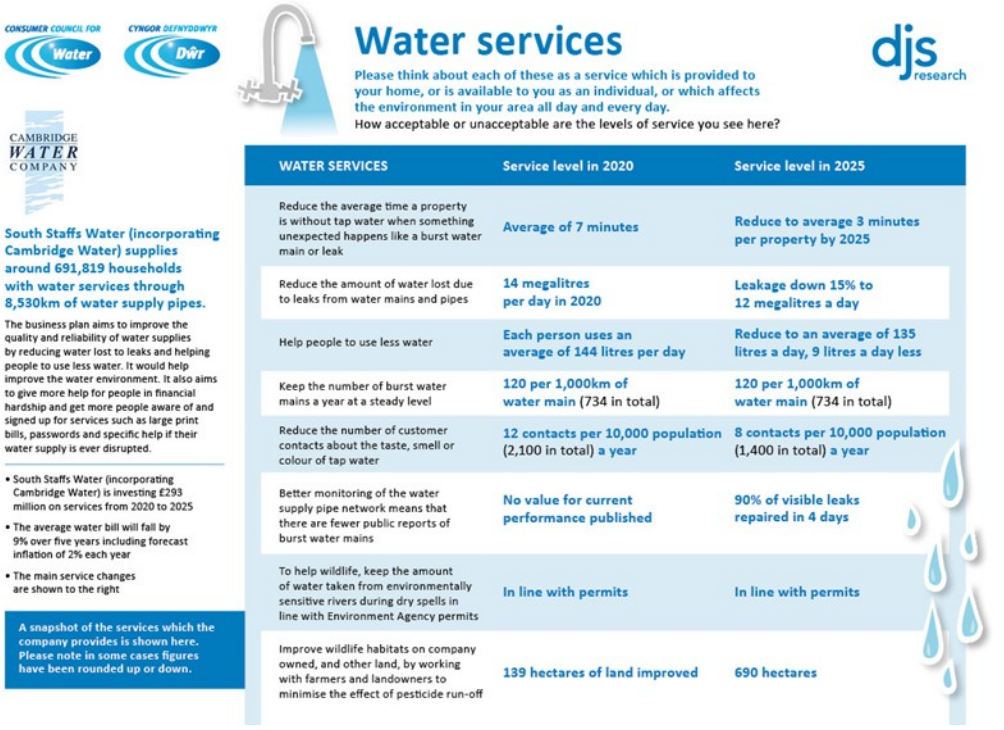
- Bristol Water is investing £516 million on services from 2020 to 2025
- The average bill will fall by 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

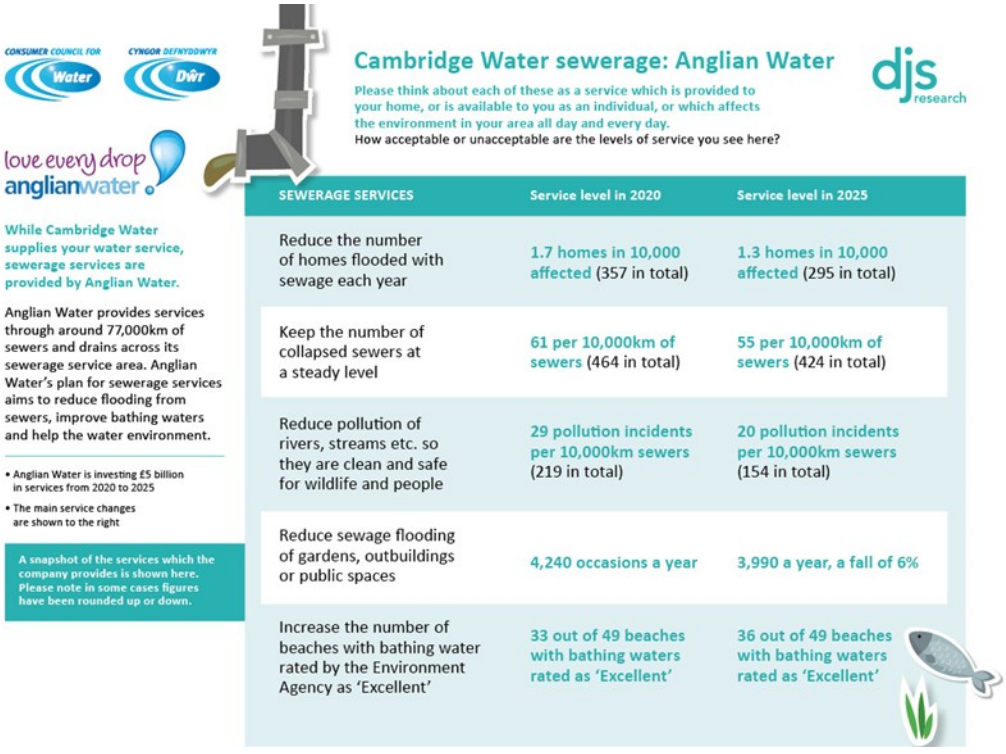
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

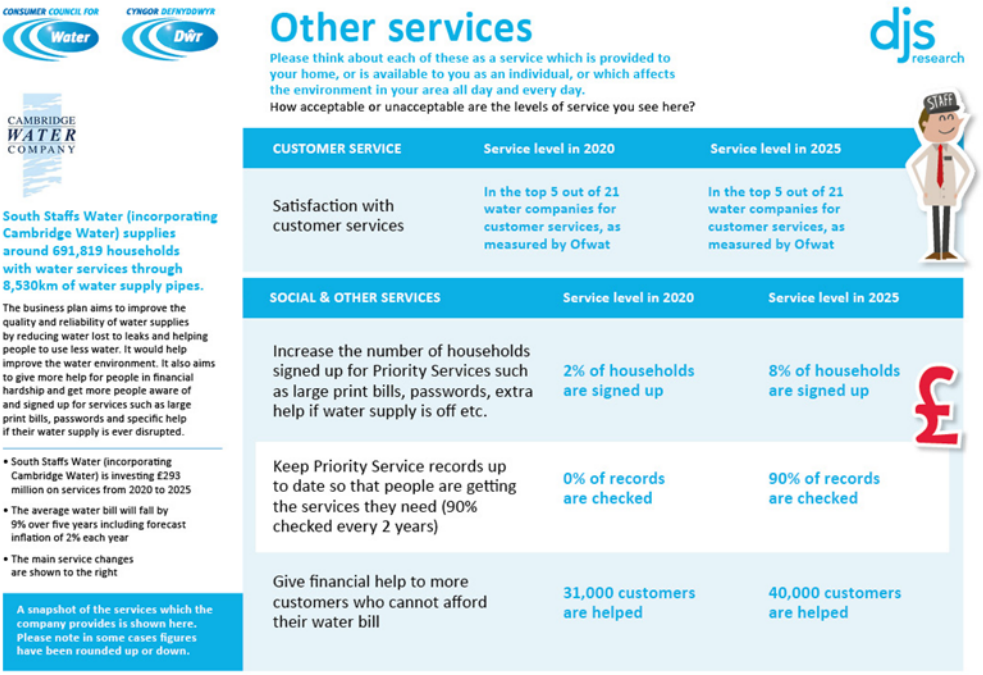
CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	1.6% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	0% of records are checked	90% of records are checked
Continue to offer financial help to customers in hardship, so that no-one spends more than 2% of their income on their water bill	0 customers spend more than 2%	0 customers spend more than 2%
Help more customers who cannot afford their water bill	18,800 customers are helped	25,300 customers are helped

Figure 58: Cambridge Water







CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

CAMBRIDGE WATER COMPANY

South Staffs Water (incorporating Cambridge Water) supplies around 691,819 households with water services through 8,530km of water supply pipes.

The business plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It would help improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- South Staffs Water (incorporating Cambridge Water) is investing £293 million on services from 2020 to 2025
- The average water bill will fall by 9% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Other services

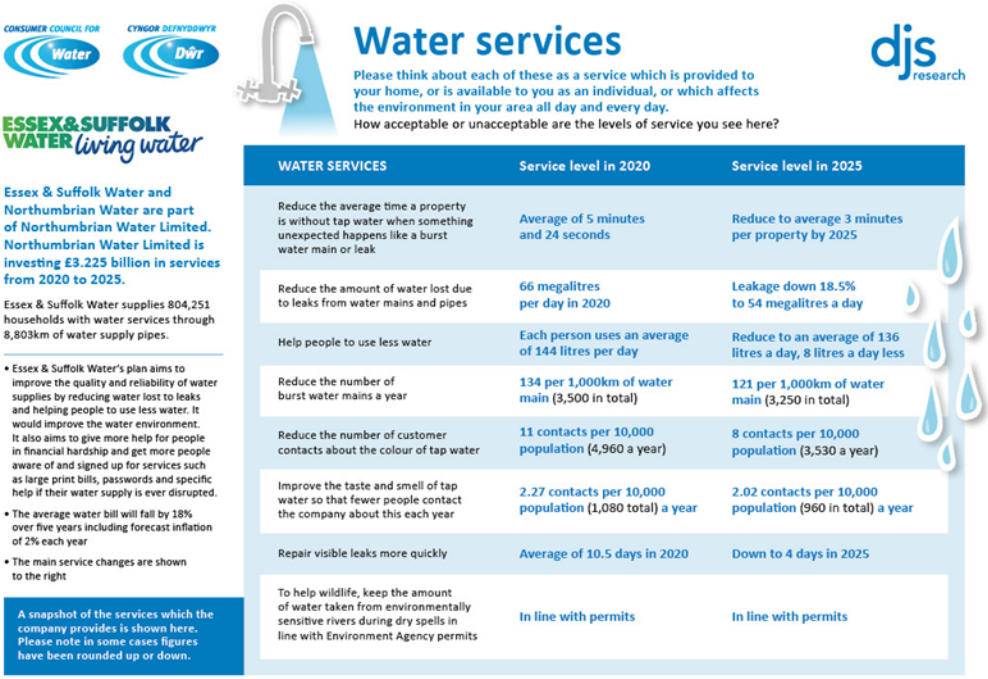
djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2% of households are signed up	8% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	0% of records are checked	90% of records are checked
Give financial help to more customers who cannot afford their water bill	31,000 customers are helped	40,000 customers are helped

Figure 59: Essex & Suffolk Water



CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

ESSEX&SUFFOLK WATER living water

Essex & Suffolk Water and Northumbrian Water are part of Northumbrian Water Limited. Northumbrian Water Limited is investing £3.225 billion in services from 2020 to 2025.

Essex & Suffolk Water supplies 804,251 households with water services through 8,803km of water supply pipes.

- Essex & Suffolk Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It would improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.
- The average water bill will fall by 18% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 5 minutes and 24 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	66 megalitres per day in 2020	Leakage down 18.5% to 54 megalitres a day
Help people to use less water	Each person uses an average of 144 litres per day	Reduce to an average of 136 litres a day, 8 litres a day less
Reduce the number of burst water mains a year	134 per 1,000km of water main (3,500 in total)	121 per 1,000km of water main (3,250 in total)
Reduce the number of customer contacts about the colour of tap water	11 contacts per 10,000 population (4,960 a year)	8 contacts per 10,000 population (3,530 a year)
Improve the taste and smell of tap water so that fewer people contact the company about this each year	2.27 contacts per 10,000 population (1,080 total) a year	2.02 contacts per 10,000 population (960 in total) a year
Repair visible leaks more quickly	Average of 10.5 days in 2020	Down to 4 days in 2025
To help wildlife, keep the amount of water taken from environmentally sensitive rivers during dry spells in line with Environment Agency permits	In line with permits	In line with permits

Essex & Suffolk sewerage: Anglian Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While Essex & Suffolk supplies your water service, sewerage services are provided by Anglian Water.

Anglian Water provides services through around 77,000km of sewers and drains across its sewerage service area. Anglian Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment.

- Anglian Water is investing £5 billion in services from 2020 to 2025
- Anglian Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment
- The main service changes are shown on the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	1.7 homes in 10,000 affected (357 in total)	1.3 homes in 10,000 affected (295 in total)
Keep the number of collapsed sewers at a steady level	61 per 10,000km of sewers (464 in total)	55 per 10,000km of sewers (424 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	29 pollution incidents per 10,000km sewers (219 in total)	20 pollution incidents per 10,000km sewers (154 in total)
Reduce sewage flooding of gardens, outbuildings or public spaces	4,240 occasions a year	3,990 a year, a fall of 6%
Increase the number of beaches with bathing water rated by the Environment Agency as 'Excellent'	33 out of 49 beaches with bathing waters designated as 'Excellent'	36 out of 49 beaches with bathing waters designated as 'Excellent'

Essex & Suffolk Water sewerage: Thames Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

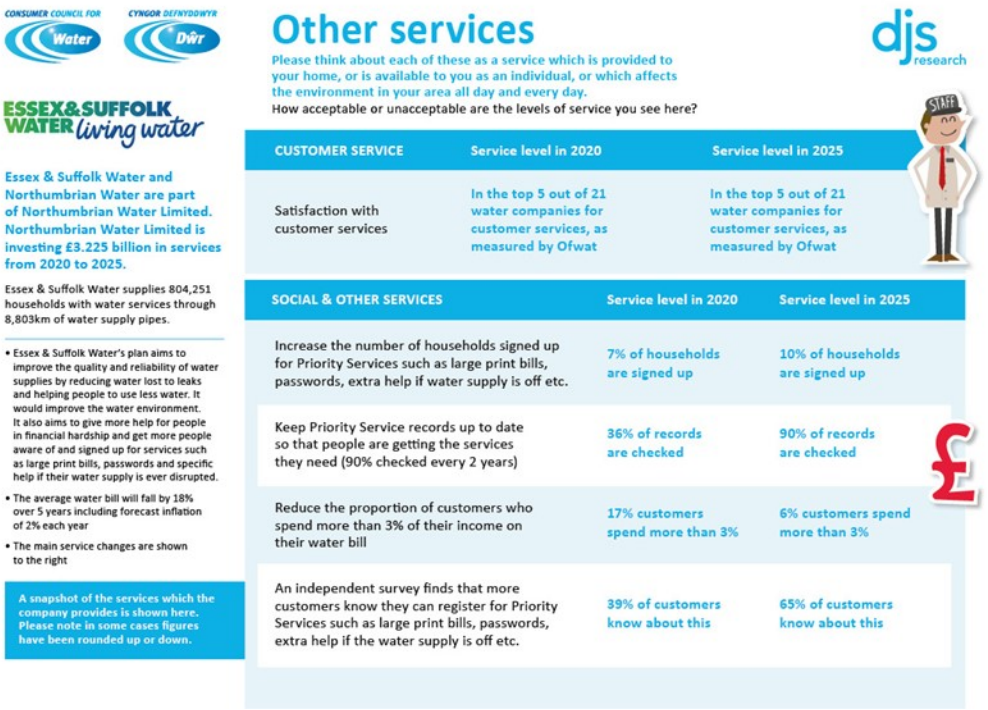
While Essex & Suffolk Water supplies your water service, sewerage services are provided by Thames Water.

Thames Water provides services through around 109,000km of sewers and drains across its sewerage service area.

- Thames Water is investing £9.26 billion in services from 2020 to 2025
- Thames Water's plan for sewerage services aims to reduce flooding from sewers and help the water environment
- The main service changes are shown on the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (1,244 in total)	1 home in 10,000 affected (800 in total)
Maintain the number of collapsed sewers per 10,000km of sewer at a steady level	40 per 10,000km of sewers (437 in total)	40 per 10,000km of sewers (437 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	28 pollution incidents per 10,000km sewers (306 in total)	19.5 pollution incidents per 10,000km sewers (213 in total)



Other services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	7% of households are signed up	10% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	36% of records are checked	90% of records are checked
Reduce the proportion of customers who spend more than 3% of their income on their water bill	17% customers spend more than 3%	6% customers spend more than 3%
An independent survey finds that more customers know they can register for Priority Services such as large print bills, passwords, extra help if the water supply is off etc.	39% of customers know about this	65% of customers know about this

CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

ESSEX&SUFFOLK WATER living water

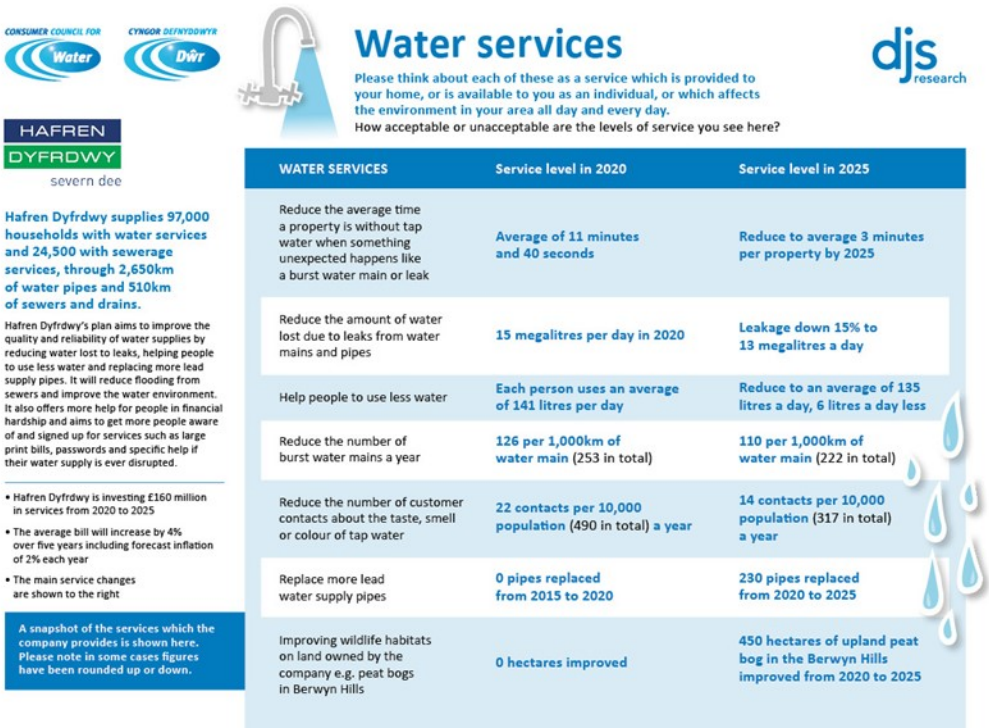
Essex & Suffolk Water and Northumbrian Water are part of Northumbrian Water Limited. Northumbrian Water Limited is investing £3.225 billion in services from 2020 to 2025.

Essex & Suffolk Water supplies 804,251 households with water services through 8,803km of water supply pipes.

- Essex & Suffolk Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It would improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.
- The average water bill will fall by 18% over 5 years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Figure 60: Hafren Dyfrdwy



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

HAFREN DYFRDWY severn dee

Hafren Dyfrdwy supplies 97,000 households with water services and 24,500 with sewerage services, through 2,650km of water pipes and 510km of sewers and drains.

Hafren Dyfrdwy's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead supply pipes. It will reduce flooding from sewers and improve the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Hafren Dyfrdwy is investing £160 million in services from 2020 to 2025
- The average bill will increase by 4% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 11 minutes and 40 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	15 megalitres per day in 2020	Leakage down 15% to 13 megalitres a day
Help people to use less water	Each person uses an average of 141 litres per day	Reduce to an average of 135 litres a day, 6 litres a day less
Reduce the number of burst water mains a year	126 per 1,000km of water main (253 in total)	110 per 1,000km of water main (222 in total)
Reduce the number of customer contacts about the taste, smell or colour of tap water	22 contacts per 10,000 population (490 in total) a year	14 contacts per 10,000 population (317 in total) a year
Replace more lead water supply pipes	0 pipes replaced from 2015 to 2020	230 pipes replaced from 2020 to 2025
Improving wildlife habitats on land owned by the company e.g. peat bogs in Berwyn Hills	0 hectares improved	450 hectares of upland peat bog in the Berwyn Hills improved from 2020 to 2025

Sewerage services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

HAFREN DYFRDWY severn dee

Sewerage services in Powys are provided by Hafren Dyfrdwy with 510km of sewers and drains.

Hafren Dyfrdwy's plan aims to improve pollution, reduce internal sewer flooding and improve the environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (5 in total)	1 home in 10,000 affected (4 in total)
Reduce the number of collapsed sewers per 1,000km of sewer	8 per 1,000km of sewers (4 in total)	5 per 1,000km of sewers (3 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	158 pollution incidents per 10,000km sewers (8 in total)	97 pollution incidents per 10,000km sewers (5 in total)
Reduce the number of blocked sewers	283 blockages a year	244 blockages a year

Hafren Dyfrdwy sewerage: Welsh Water

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

Dŵr Cymru Welsh Water

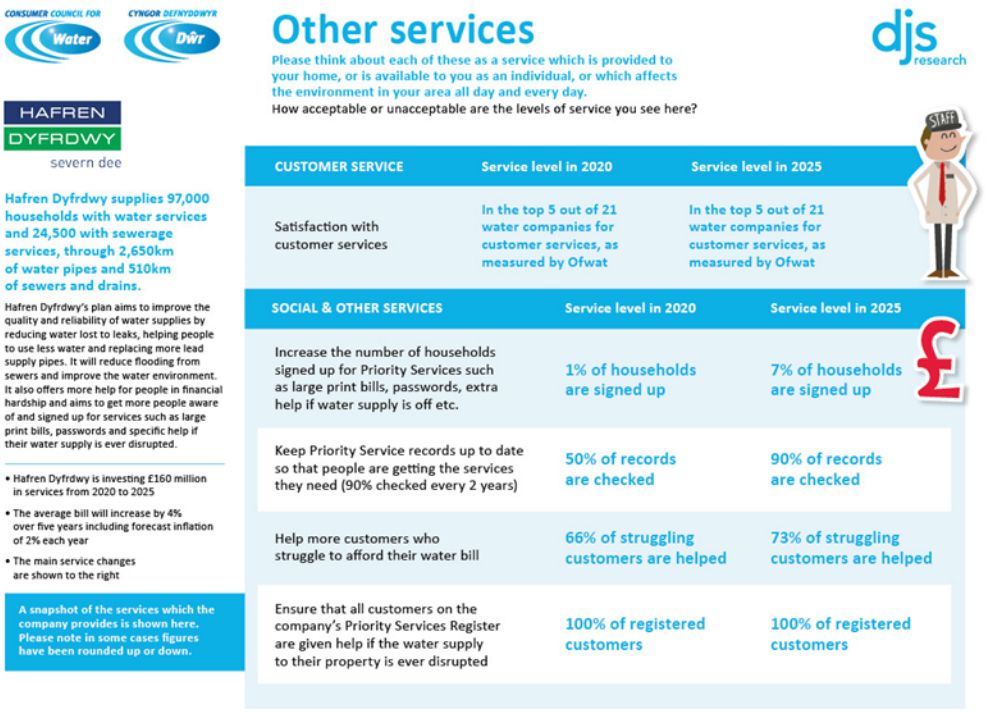
Sewerage services in North-East Wales (Wrexham, Flintshire and Denbighshire) are provided by Dŵr Cymru Welsh Water with around 36,500km of sewers and drains across its sewerage service area.

Dŵr Cymru Welsh Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2.1 homes in 10,000 affected (300 in total)	1.3 homes in 10,000 affected (188 in total)
Keep the number of collapsed sewers at a steady level	75 per 10,000km of sewers (274 in total)	72 per 10,000km of sewers (263 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	25 pollution incidents per 10,000km sewers (106 in total)	20 pollution incidents per 10,000km sewers (73 in total)
Reduce the number of properties and gardens at risk of repeated sewage flooding	368 properties & gardens in 2020	357 properties & gardens in 2025
Reduce sewage flooding of gardens or outbuildings	4,100 occasions a year	3,200 a year, a fall of 22.5%



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

HAFREN DYFRDWY severn dee

Hafren Dyfrdwy supplies 97,000 households with water services and 24,500 with sewerage services, through 2,650km of water pipes and 510km of sewers and drains.

Hafren Dyfrdwy's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead supply pipes. It will reduce flooding from sewers and improve the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Hafren Dyfrdwy is investing £160 million in services from 2020 to 2025
- The average bill will increase by 4% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Other services

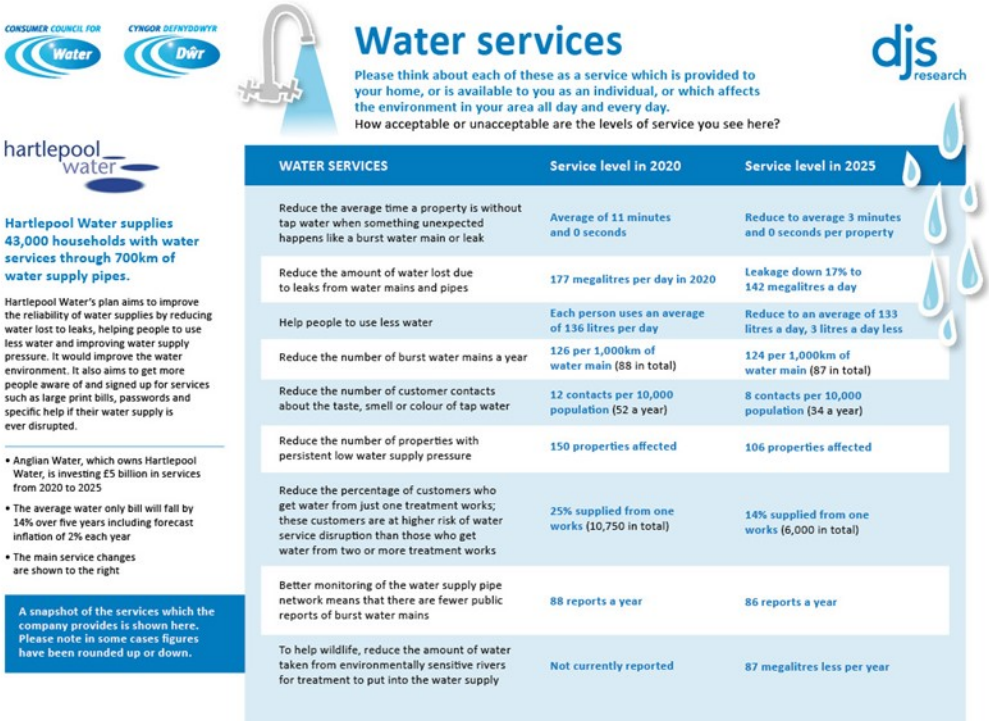
djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	1% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	50% of records are checked	90% of records are checked
Help more customers who struggle to afford their water bill	66% of struggling customers are helped	73% of struggling customers are helped
Ensure that all customers on the company's Priority Services Register are given help if the water supply to their property is ever disrupted	100% of registered customers	100% of registered customers

Figure 61: Hartlepool Water



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

hartlepool water

Hartlepool Water supplies 43,000 households with water services through 700km of water supply pipes.

Hartlepool Water's plan aims to improve the reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Anglian Water, which owns Hartlepool Water, is investing £5 billion in services from 2020 to 2025
- The average water only bill will fall by 14% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 11 minutes and 0 seconds	Reduce to average 3 minutes and 0 seconds per property
Reduce the amount of water lost due to leaks from water mains and pipes	177 megalitres per day in 2020	Leakage down 17% to 142 megalitres a day
Help people to use less water	Each person uses an average of 136 litres per day	Reduce to an average of 133 litres a day, 3 litres a day less
Reduce the number of burst water mains a year	126 per 1,000km of water main (88 in total)	124 per 1,000km of water main (87 in total)
Reduce the number of customer contacts about the taste, smell or colour of tap water	12 contacts per 10,000 population (52 a year)	8 contacts per 10,000 population (34 a year)
Reduce the number of properties with persistent low water supply pressure	150 properties affected	106 properties affected
Reduce the percentage of customers who get water from just one treatment works; these customers are at higher risk of water service disruption than those who get water from two or more treatment works	25% supplied from one works (10,750 in total)	14% supplied from one works (6,000 in total)
Better monitoring of the water supply pipe network means that there are fewer public reports of burst water mains	88 reports a year	86 reports a year
To help wildlife, reduce the amount of water taken from environmentally sensitive rivers for treatment to put into the water supply	Not currently reported	87 megalitres less per year

Hartlepool sewerage: Northumbrian Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While Hartlepool supplies your water service, sewerage services are provided by Northumbrian Water, which provides services through 30,000km of sewers and drains across its sewerage service area.

- Northumbrian Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water enviroment
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2.4 homes in 10,000 affected (292 in total)	1.3 homes in 10,000 affected (170 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	113 per 10,000km of sewers (340 in total)	81 per 10,000km of sewers (245 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	25 pollution incidents per 10,000km sewers (75 in total)	19.5 pollution incidents per 10,000km sewers (59 in total)
Reduce sewage flooding of gardens or outbuildings	3,550 occasions a year	2,650 a year, a fall of 25.5%
Reduce the number of properties flooded by sewage more than once within 5 years	48 properties	37 properties
Increase the number of beaches with bathing water rated by the Environment Agency as 'Good' or 'Excellent'	32 out of 34 beaches with bathing waters designated as 'Excellent' or 'Good'	33 out of 34 beaches with bathing waters designated as 'Excellent' or 'Good'

Other services

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

Hartlepool Water supplies 43,000 households with water services through 700km of water supply pipes.

Hartlepool Water's plan aims to improve the reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

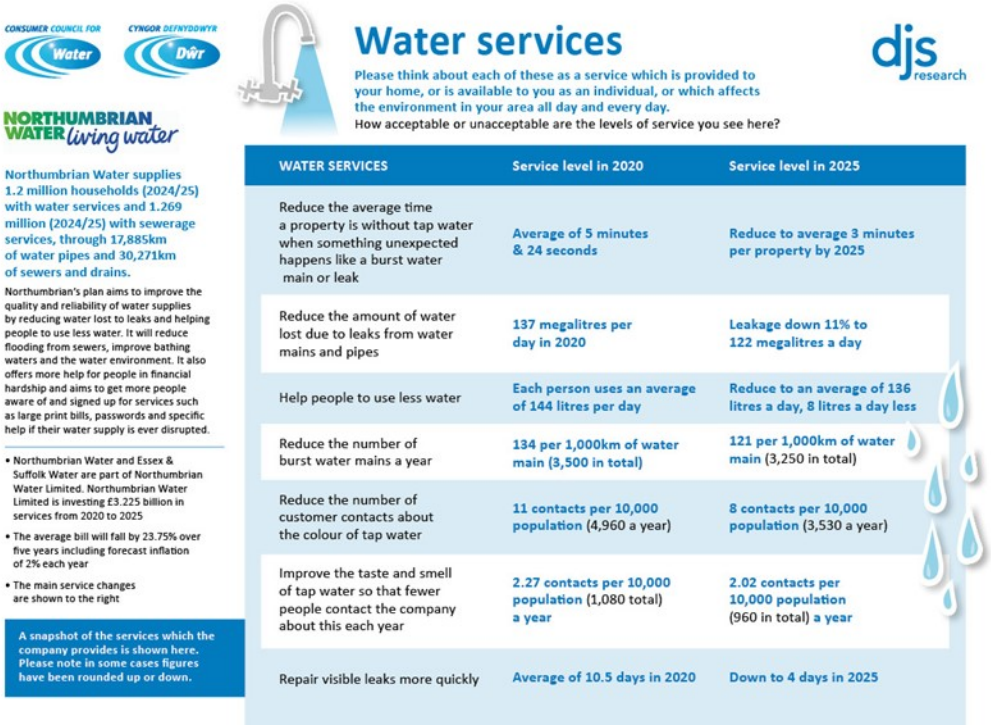
- Anglian Water, which owns Hartlepool Water, is investing £5 billion in services from 2020 to 2025
- The average water only bill will fall by 14% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

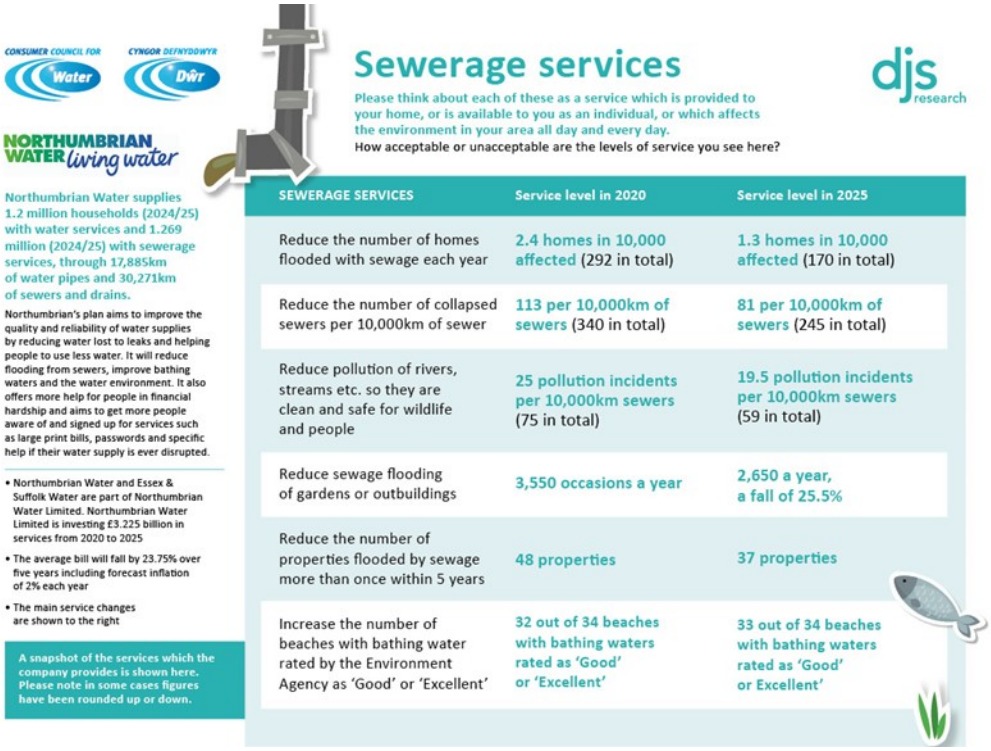
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

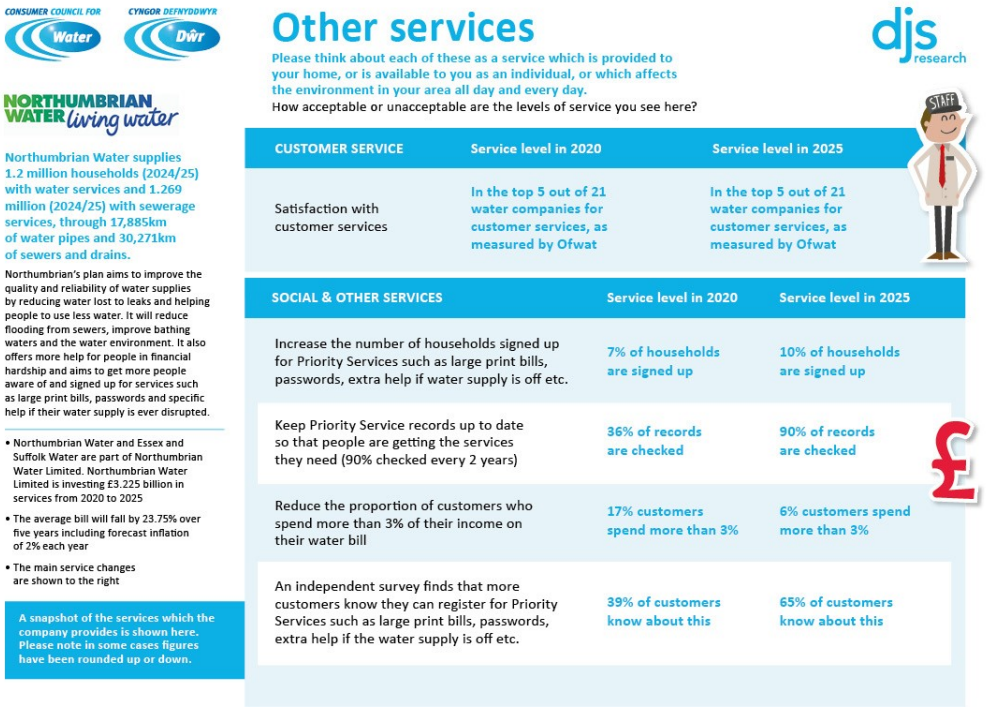
CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	1.4% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	97% of records are checked	90% of records are checked

Figure 62: Northumbrian Water







CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

NORTHUMBRIAN WATER living water

Northumbrian Water supplies 1.2 million households (2024/25) with water services and 1.269 million (2024/25) with sewerage services, through 17,885km of water pipes and 30,271km of sewers and drains.

Northumbrian's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It will reduce flooding from sewers, improve bathing waters and the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Northumbrian Water and Essex and Suffolk Water are part of Northumbrian Water Limited. Northumbrian Water Limited is investing £3.225 billion in services from 2020 to 2025
- The average bill will fall by 23.75% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Other services

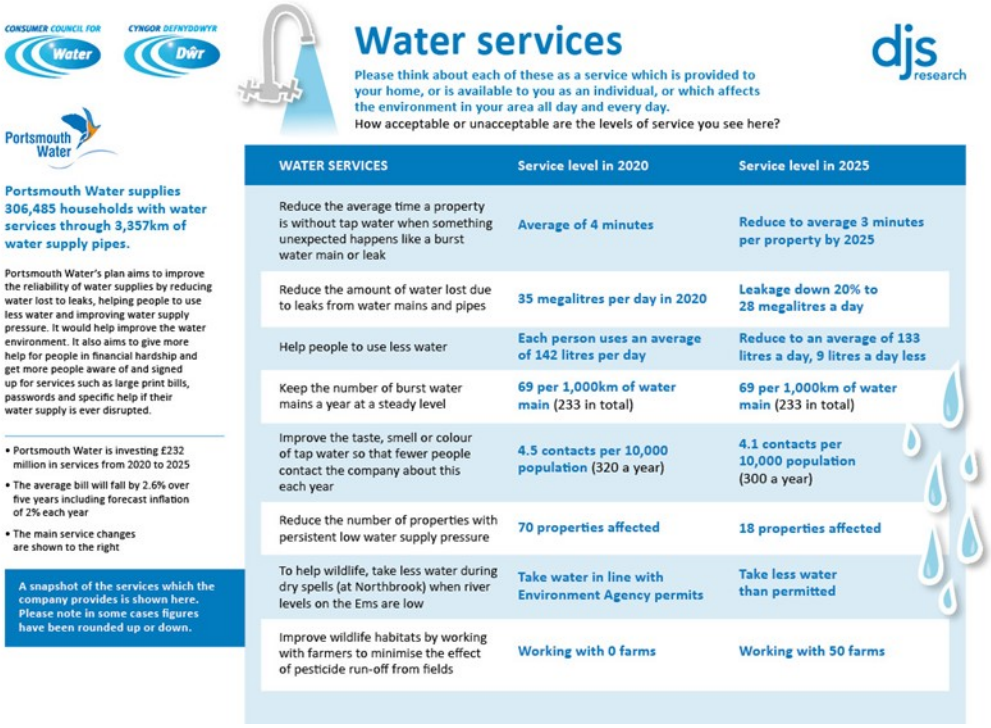
djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	7% of households are signed up	10% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	36% of records are checked	90% of records are checked
Reduce the proportion of customers who spend more than 3% of their income on their water bill	17% customers spend more than 3%	6% customers spend more than 3%
An independent survey finds that more customers know they can register for Priority Services such as large print bills, passwords, extra help if the water supply is off etc.	39% of customers know about this	65% of customers know about this

Figure 63: Portsmouth Water



CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

Portsmouth Water

Portsmouth Water supplies 306,485 households with water services through 3,357km of water supply pipes.

Portsmouth Water's plan aims to improve the reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would help improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Portsmouth Water is investing £232 million in services from 2020 to 2025
- The average bill will fall by 2.6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 4 minutes	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	35 megalitres per day in 2020	Leakage down 20% to 28 megalitres a day
Help people to use less water	Each person uses an average of 142 litres per day	Reduce to an average of 133 litres a day, 9 litres a day less
Keep the number of burst water mains a year at a steady level	69 per 1,000km of water main (233 in total)	69 per 1,000km of water main (233 in total)
Improve the taste, smell or colour of tap water so that fewer people contact the company about this each year	4.5 contacts per 10,000 population (320 a year)	4.1 contacts per 10,000 population (300 a year)
Reduce the number of properties with persistent low water supply pressure	70 properties affected	18 properties affected
To help wildlife, take less water during dry spells (at Northbrook) when river levels on the Ems are low	Take water in line with Environment Agency permits	Take less water than permitted
Improve wildlife habitats by working with farmers to minimise the effect of pesticide run-off from fields	Working with 0 farms	Working with 50 farms

Portsmouth Water sewerage: Southern Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While Portsmouth Water supplies your water service, sewerage services are provided by Southern Water, which provides services through 39,700km of sewers and drains across its sewerage service area.

- Southern Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (398 in total)	1.3 homes in 10,000 affected (284 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	58 per 10,000km of sewers (231 in total)	54.8 per 10,000km of sewers (225 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	32.5 pollution incidents per 10,000km sewers (130 in total)	19.5 pollution incidents per 10,000km sewers (80 in total)
Reduce sewage flooding of gardens or outbuildings	5,040 occasions a year	3,525 a year, a fall of 30%
Ensure that 'Excellent' bathing water quality is maintained at all beaches where the Environment Agency has already given this rating	57 beaches with bathing waters designated as 'Excellent'	59 beaches with bathing waters designated as 'Excellent'
Increase the number of beaches with bathing water rated by the Environment Agency as 'Excellent'	57 out of 83 beaches with bathing waters designated as 'Excellent'	59 out of 83 beaches with bathing waters designated as 'Excellent'
Improve bathing water at these 5 beaches to 'Good' quality as rated by the Environment Agency: Broadstairs Viking Bay, Littlestone, Lancing Beach Green, Hastings Pelham Beach and Felpham	0 out of these 5 are rated 'Good'	All 5 are rated 'Good'

Other services

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

Portsmouth Water supplies 306,485 households with water services through 3,357km of water supply pipes.

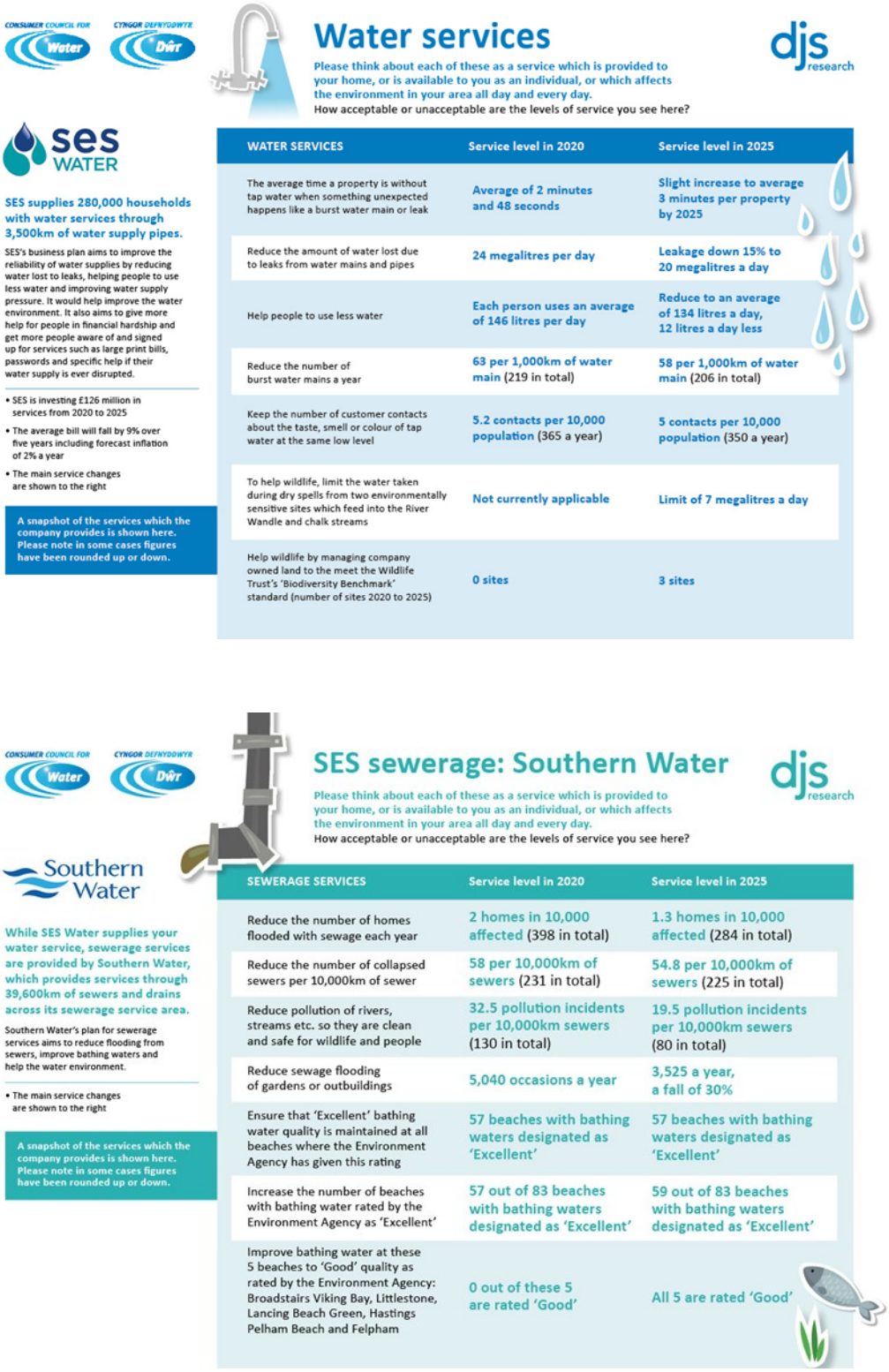
Portsmouth Water's plan aims to improve the reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would help improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Portsmouth Water is investing £232 million in services from 2020 to 2025
- The average bill will fall by 2.6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	0.1% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	0% of records are checked	90% of records are checked
Give financial help to more customers who cannot afford their water bill	6,000 customers are helped	10,000 customers are helped

Figure 64: SES Water



SES sewerage: Thames Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While SES Water supplies your water service, sewerage services are provided by Thames Water, which provides services through 100,000km of sewers and drains across its sewerage service area.

Thames Water's plan for sewerage services aims to reduce flooding from sewers and help the water environment.

- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (1,244 in total)	1 home in 10,000 affected (800 in total)
Maintain the number of collapsed sewers per 10,000km of sewer at a steady level	40 per 10,000km of sewers (437 in total)	40 per 10,000km of sewers (437 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	28 pollution incidents per 10,000km sewers (306 in total)	19.5 pollution incidents per 10,000km sewers (213 in total)

Other services

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

SES supplies 280,000 households with water services through 3,500km of water supply pipes.

SES's business plan aims to improve the reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would help improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

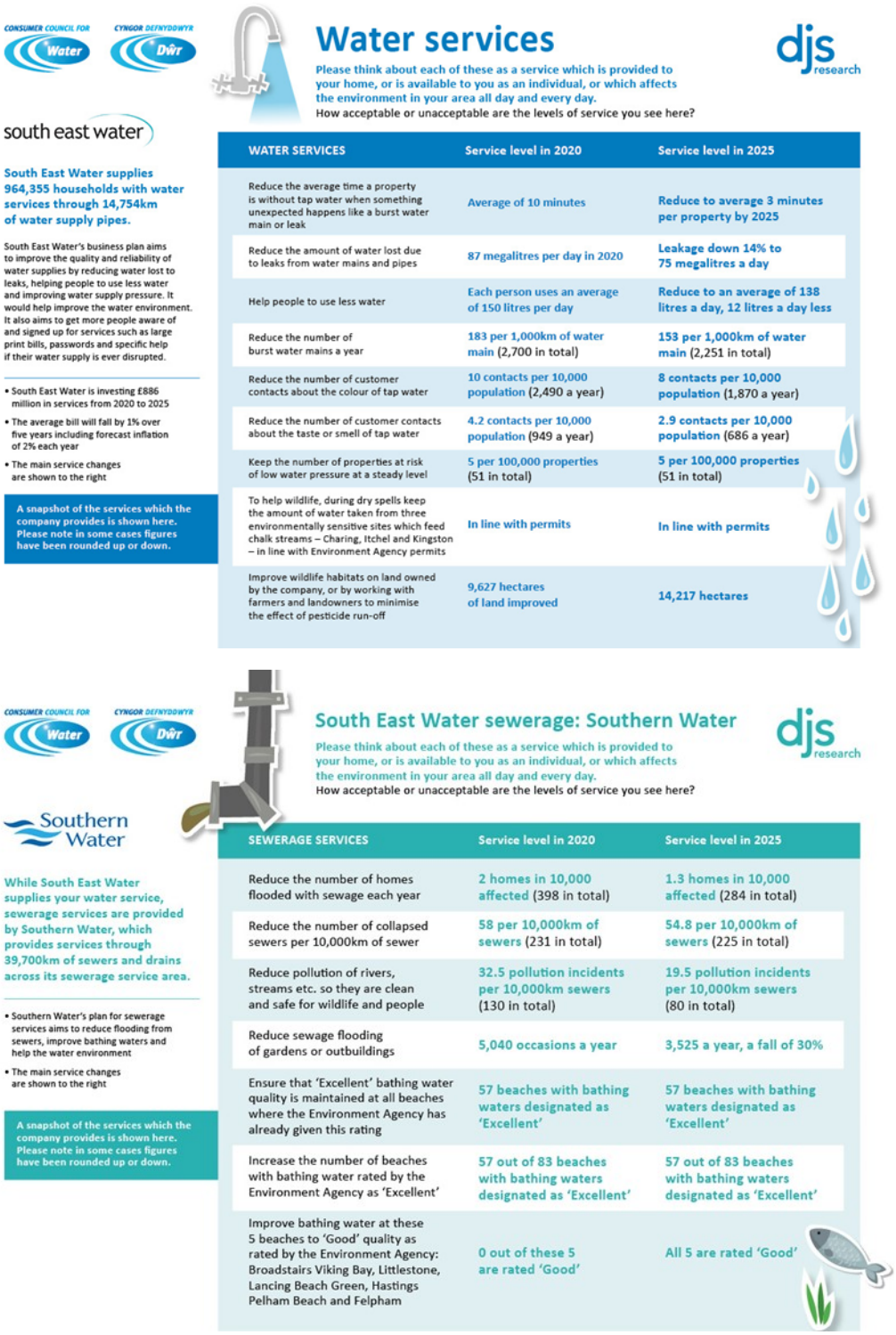
- SES is investing £126 million in services from 2020 to 2025
- The average bill will fall by 9% over five years including forecast inflation of 2% a year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	3% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	0% of records are checked	90% of records are checked
Give financial help to more customers who cannot afford their water bill	11,450 customers are helped	25,000 customers are helped
Better handling of customer contacts	78% of queries are resolved on first contact	90% of queries are resolved on first contact

Figure 65: South East Water



CONSUMER COUNCIL FOR Water · CYNGOR DEFNYDDWYR Dŵr

south east water

South East Water supplies 964,355 households with water services through 14,754km of water supply pipes.

South East Water's business plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would help improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- South East Water is investing £886 million in services from 2020 to 2025
- The average bill will fall by 1% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 10 minutes	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	87 megalitres per day in 2020	Leakage down 14% to 75 megalitres a day
Help people to use less water	Each person uses an average of 150 litres per day	Reduce to an average of 138 litres a day, 12 litres a day less
Reduce the number of burst water mains a year	183 per 1,000km of water main (2,700 in total)	153 per 1,000km of water main (2,251 in total)
Reduce the number of customer contacts about the colour of tap water	10 contacts per 10,000 population (2,490 a year)	8 contacts per 10,000 population (1,870 a year)
Reduce the number of customer contacts about the taste or smell of tap water	4.2 contacts per 10,000 population (949 a year)	2.9 contacts per 10,000 population (686 a year)
Keep the number of properties at risk of low water pressure at a steady level	5 per 100,000 properties (51 in total)	5 per 100,000 properties (51 in total)
To help wildlife, during dry spells keep the amount of water taken from three environmentally sensitive sites which feed chalk streams – Charing, Itchel and Kingston – in line with Environment Agency permits	In line with permits	In line with permits
Improve wildlife habitats on land owned by the company, or by working with farmers and landowners to minimise the effect of pesticide run-off	9,627 hectares of land improved	14,217 hectares

CONSUMER COUNCIL FOR Water · CYNGOR DEFNYDDWYR Dŵr

Southern Water

While South East Water supplies your water service, sewerage services are provided by Southern Water, which provides services through 39,700km of sewers and drains across its sewerage service area.

- Southern Water's plan for sewerage services aims to reduce flooding from sewers, improve bathing waters and help the water environment
- The main service changes are shown to the right

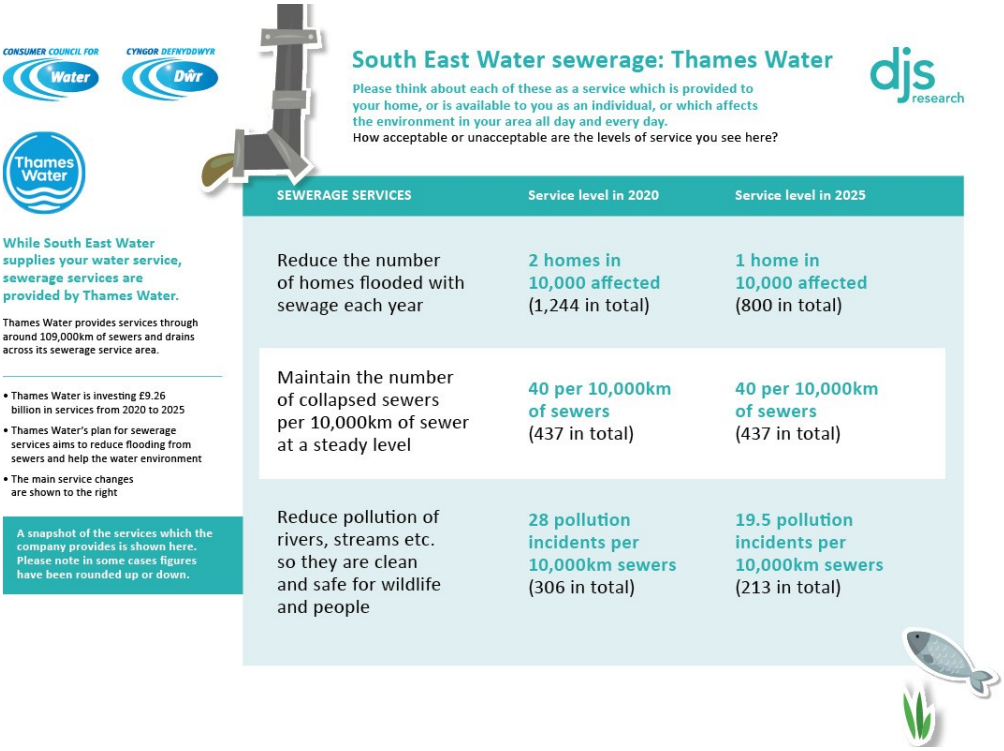
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

South East Water sewerage: Southern Water

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (398 in total)	1.3 homes in 10,000 affected (284 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	58 per 10,000km of sewers (231 in total)	54.8 per 10,000km of sewers (225 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	32.5 pollution incidents per 10,000km sewers (130 in total)	19.5 pollution incidents per 10,000km sewers (80 in total)
Reduce sewage flooding of gardens or outbuildings	5,040 occasions a year	3,525 a year, a fall of 30%
Ensure that 'Excellent' bathing water quality is maintained at all beaches where the Environment Agency has already given this rating	57 beaches with bathing waters designated as 'Excellent'	57 beaches with bathing waters designated as 'Excellent'
Increase the number of beaches with bathing water rated by the Environment Agency as 'Excellent'	57 out of 83 beaches with bathing waters designated as 'Excellent'	57 out of 83 beaches with bathing waters designated as 'Excellent'
Improve bathing water at these 5 beaches to 'Good' quality as rated by the Environment Agency: Broadstairs Viking Bay, Littlestone, Lancing Beach Green, Hastings Pelham Beach and Felpham	0 out of these 5 are rated 'Good'	All 5 are rated 'Good'



South East Water sewerage: Thames Water

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While South East Water supplies your water service, sewerage services are provided by Thames Water.

Thames Water provides services through around 109,000km of sewers and drains across its sewerage service area.

- Thames Water is investing £9.26 billion in services from 2020 to 2025
- Thames Water's plan for sewerage services aims to reduce flooding from sewers and help the water environment
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (1,244 in total)	1 home in 10,000 affected (800 in total)
Maintain the number of collapsed sewers per 10,000km of sewer at a steady level	40 per 10,000km of sewers (437 in total)	40 per 10,000km of sewers (437 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	28 pollution incidents per 10,000km sewers (306 in total)	19.5 pollution incidents per 10,000km sewers (213 in total)

Other services

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

South East Water supplies 964,355 households with water services through 14,754km of water supply pipes.

South East Water's business plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It would help improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- South East Water is investing £886 million in services from 2020 to 2025
- The average bill will fall by 1% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2.1% of households are signed up	10.8% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	9.7% of records are checked	90% of records are checked
Give financial help to more customers who cannot afford their water bill	30,000 customers are helped	75,000 customers are helped

Figure 66: South Staffs Water

CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

South Staffs Water

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

South Staffs Water (incorporating Cambridge Water) supplies around 691,819 households with water services through 8,530km of water supply pipes.

South Staffs Water's business plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It would help improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- South Staffs Water (incorporating Cambridge Water) is investing £293 million on services from 2020 to 2025
- The average bill will fall by 9% over 5 years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 7 minutes	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	71 megalitres per day in 2020	Leakage down 25% to 53 megalitres a day
Help people to use less water	Each person uses an average of 130 litres per day	Reduce to an average of 128 litres a day, 2 litres a day less
Keep the number of burst water mains a year at a steady level	120 per 1,000km of water main (799 in total)	120 per 1,000km of water main (799 in total)
Reduce the number of customer contacts about the taste, smell or colour of tap water	12 contacts per 10,000 population (2,100 in total) a year	8 contacts per 10,000 population (1,400 in total) a year
Better monitoring of the water supply pipe network means that there are fewer public reports of burst water mains	No value for current performance published	90% of visible leaks repaired in 4 days
To help wildlife, keep the amount of water taken from environmentally sensitive rivers during dry spells in line with Environment Agency permits	In line with permits	In line with permits
Improve wildlife habitats on company owned, and other land, by working with farmers and landowners to minimise the effect of pesticide run-off	139 hectares of land improved	690 hectares

CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

SEVERN TRENT

South Staffs Water sewerage: Severn Trent Water

djs research

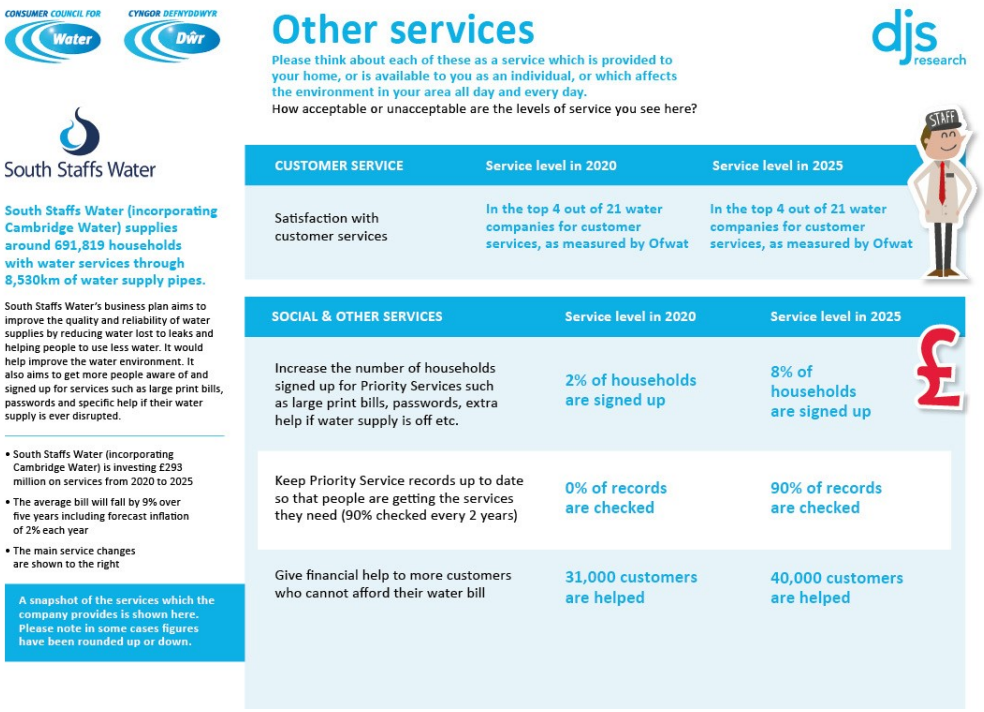
Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

While South Staffs Water supplies your water service, sewerage services are provided by Severn Trent, which provides services through 93,500km of sewers and drains across its sewerage service area.

- Severn Trent's plan for sewerage services aims to reduce flooding from sewers and help the water environment
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (705 in total)	1 home in 10,000 affected (572 in total)
Keep the number of collapsed sewers at a steady level	5 per 1,000km of sewers (484 in total)	5 per 1,000km of sewers (484 in total)
Reduce sewage flooding of public spaces and highways	2,000 occasions a year	1,900 a year, a fall of 5%
Reduce sewage flooding of gardens or outbuildings	3,700 occasions a year	3,400 a year, a fall of 8%
Reduce the number of blocked sewers	43,200 blockages a year	41,000 blockages a year, a fall of 4%
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	27 pollution incidents per 10,000km sewers (258 in total)	20 pollution incidents per 10,000km sewers (186 in total)



Other services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

South Staffs Water

South Staffs Water (incorporating Cambridge Water) supplies around 691,819 households with water services through 8,530km of water supply pipes.

South Staffs Water's business plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It would help improve the water environment. It also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

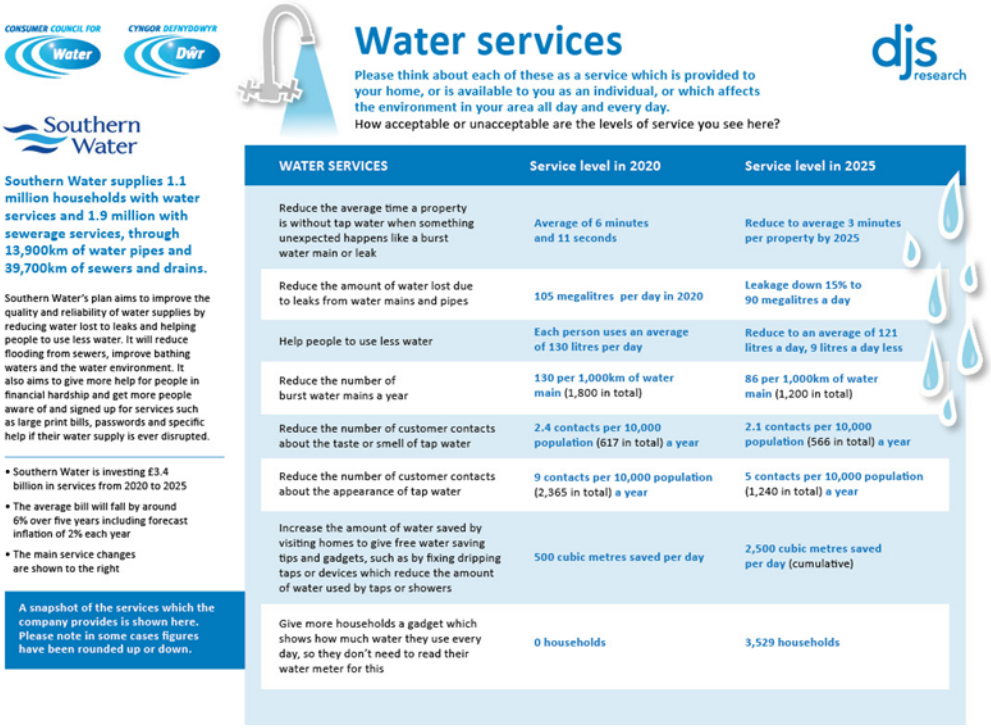
- South Staffs Water (incorporating Cambridge Water) is investing £293 million on services from 2020 to 2025
- The average bill will fall by 9% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 4 out of 21 water companies for customer services, as measured by Ofwat	In the top 4 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2% of households are signed up	8% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	0% of records are checked	90% of records are checked
Give financial help to more customers who cannot afford their water bill	31,000 customers are helped	40,000 customers are helped

Figure 67: Southern Water



Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

Southern Water

Southern Water supplies 1.1 million households with water services and 1.9 million with sewerage services, through 13,900km of water pipes and 39,700km of sewers and drains.

Southern Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It will reduce flooding from sewers, improve bathing waters and the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Southern Water is investing £3.4 billion in services from 2020 to 2025
- The average bill will fall by around 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 6 minutes and 11 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	105 megalitres per day in 2020	Leakage down 15% to 90 megalitres a day
Help people to use less water	Each person uses an average of 130 litres per day	Reduce to an average of 121 litres a day, 9 litres a day less
Reduce the number of burst water mains a year	130 per 1,000km of water main (1,800 in total)	86 per 1,000km of water main (1,200 in total)
Reduce the number of customer contacts about the taste or smell of tap water	2.4 contacts per 10,000 population (617 in total) a year	2.1 contacts per 10,000 population (566 in total) a year
Reduce the number of customer contacts about the appearance of tap water	9 contacts per 10,000 population (2,365 in total) a year	5 contacts per 10,000 population (1,240 in total) a year
Increase the amount of water saved by visiting homes to give free water saving tips and gadgets, such as by fixing dripping taps or devices which reduce the amount of water used by taps or showers	500 cubic metres saved per day	2,500 cubic metres saved per day (cumulative)
Give more households a gadget which shows how much water they use every day, so they don't need to read their water meter for this	0 households	3,529 households

CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

Southern Water

Southern Water supplies 1.1 million households with water services and 1.9 million with sewerage services, through 13,900km of water pipes and 39,700km of sewers and drains.

Southern Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It will reduce flooding from sewers, improve bathing waters and the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Southern Water is investing £3.4 billion in services from 2020 to 2025
- The average bill will fall by around 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Sewerage services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (398 in total)	1.3 homes in 10,000 affected (284 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	58 per 10,000km of sewers (231 in total)	54.8 per 10,000km of sewers (225 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	32.5 pollution incidents per 10,000km sewers (130 in total)	19.5 pollution incidents per 10,000km sewers (80 in total)
Reduce sewage flooding of gardens or outbuildings	5,040 occasions a year	3,525 a year, a fall of 30%
Ensure that 'Excellent' bathing water quality is maintained at all beaches where the Environment Agency has given this rating	57 beaches with bathing waters designated as 'Excellent'	57 beaches with bathing waters designated as 'Excellent'
Increase the number of beaches with bathing water rated by the Environment Agency as 'Excellent'	57 out of 83 beaches with bathing waters designated as 'Excellent'	59 out of 83 beaches with bathing waters designated as 'Excellent'
Improve bathing water at these 5 beaches to 'Good' quality as rated by the Environment Agency: Broadstairs Viking Bay, Littlestone, Lancing Beach Green, Hastings Pelham Beach and Felpham	0 out of these 5 are rated 'Good'	All 5 are rated 'Good'

CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

Southern Water

Southern Water supplies 1.1 million households with water services and 1.9 million with sewerage services, through 13,900km of water pipes and 39,700km of sewers and drains.

Southern Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It will reduce flooding from sewers, improve bathing waters and the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Southern Water is investing £3.4 billion in services from 2020 to 2025
- The average bill will fall by around 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Other services

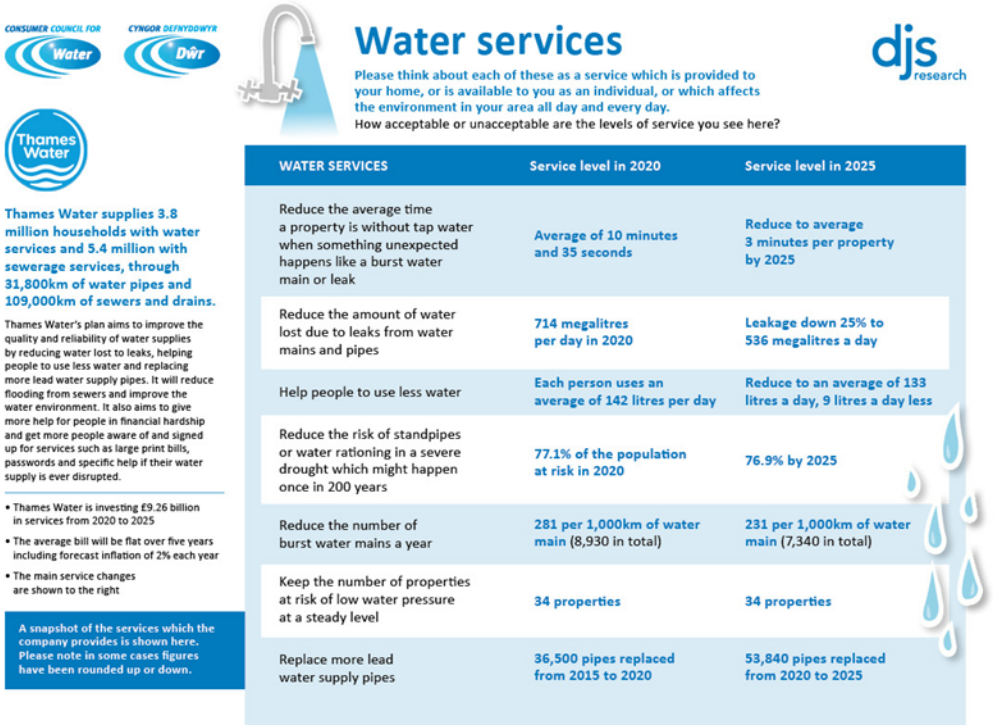
djs research

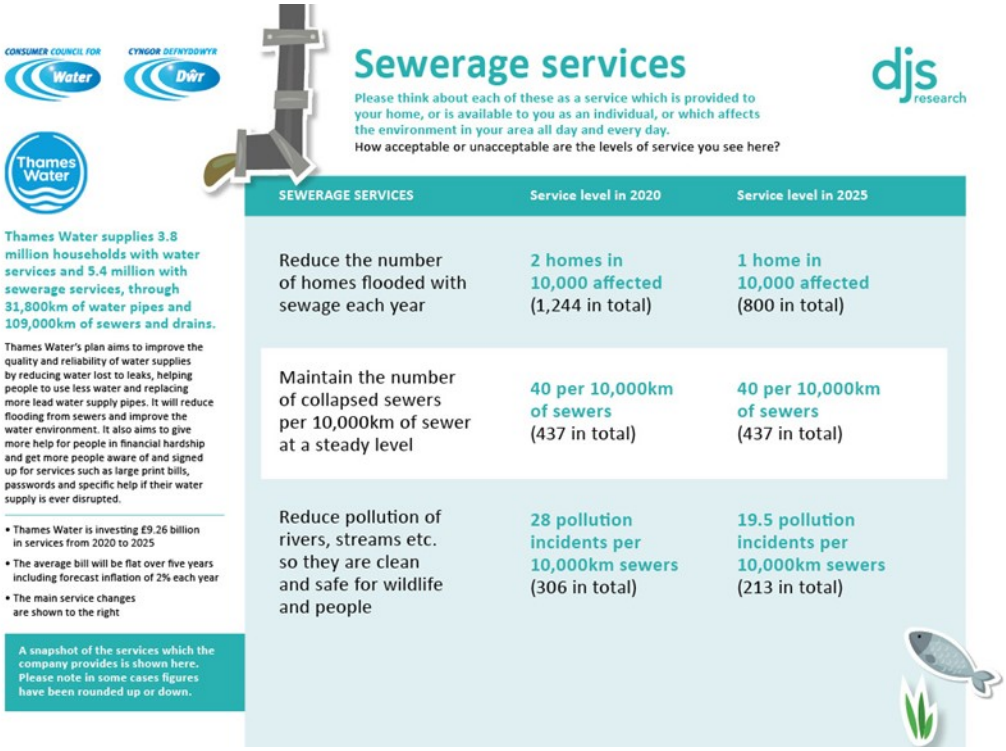
Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

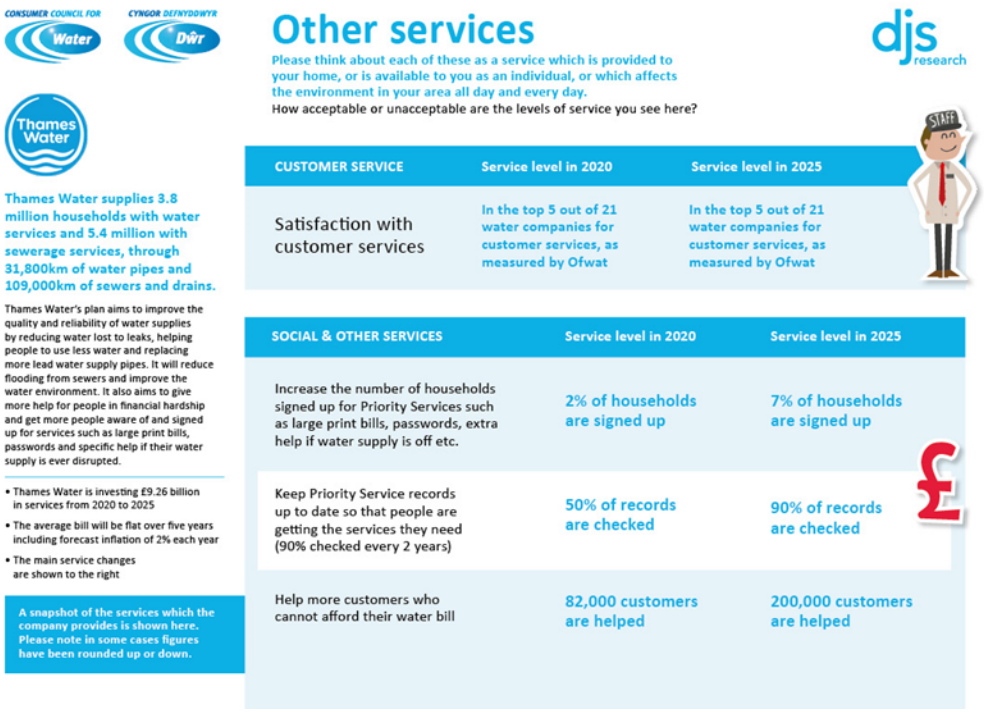
CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	1.2% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	15% of records are checked	90% of records are checked
More customers who cannot afford their water bill are given the right level of financial help to enable them to pay	65% of those helped can then afford their water bill	90% of those helped can afford their water bill

Figure 68: Thames Water







Other services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	50% of records are checked	90% of records are checked
Help more customers who cannot afford their water bill	82,000 customers are helped	200,000 customers are helped

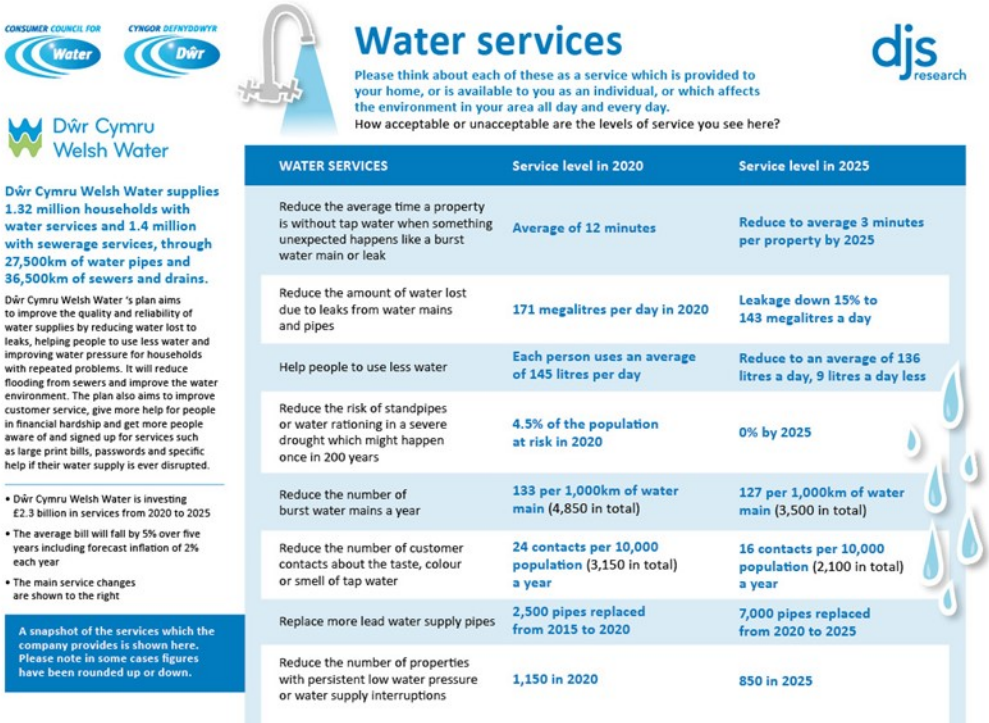
Thames Water supplies 3.8 million households with water services and 5.4 million with sewerage services, through 31,800km of water pipes and 109,000km of sewers and drains.

Thames Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead water supply pipes. It will reduce flooding from sewers and improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Thames Water is investing £9.26 billion in services from 2020 to 2025
- The average bill will be flat over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Figure 69: Dwr Cymru (Welsh Water)



Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 12 minutes	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	171 megalitres per day in 2020	Leakage down 15% to 143 megalitres a day
Help people to use less water	Each person uses an average of 145 litres per day	Reduce to an average of 136 litres a day, 9 litres a day less
Reduce the risk of standpipes or water rationing in a severe drought which might happen once in 200 years	4.5% of the population at risk in 2020	0% by 2025
Reduce the number of burst water mains a year	133 per 1,000km of water main (4,850 in total)	127 per 1,000km of water main (3,500 in total)
Reduce the number of customer contacts about the taste, colour or smell of tap water	24 contacts per 10,000 population (3,150 in total) a year	16 contacts per 10,000 population (2,100 in total) a year
Replace more lead water supply pipes	2,500 pipes replaced from 2015 to 2020	7,000 pipes replaced from 2020 to 2025
Reduce the number of properties with persistent low water pressure or water supply interruptions	1,150 in 2020	850 in 2025

Dŵr Cymru Welsh Water supplies 1.32 million households with water services and 1.4 million with sewerage services, through 27,500km of water pipes and 36,500km of sewers and drains.

Dŵr Cymru Welsh Water 's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water pressure for households with repeated problems. It will reduce flooding from sewers and improve the water environment. The plan also aims to improve customer service, give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Dŵr Cymru Welsh Water is investing £2.3 billion in services from 2020 to 2025
- The average bill will fall by 5% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

Dŵr Cymru Welsh Water

Dŵr Cymru Welsh Water supplies 1.32 million households with water services and 1.4 million with sewerage services, through 27,500km of water pipes and 36,500km of sewers and drains.

Dŵr Cymru Welsh Water 's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water pressure for households with repeated problems. It will reduce flooding from sewers and improve the water environment. The plan also aims to improve customer service, give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Dŵr Cymru Welsh Water is investing £2.3 billion in services from 2020 to 2025
- The average bill will fall by 5% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Sewerage services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2.1 homes in 10,000 affected (300 in total)	1.3 homes in 10,000 affected (188 in total)
Keep the number of collapsed sewers at a steady level	75 per 10,000km of sewers (274 in total)	72 per 10,000km of sewers (263 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	25 pollution incidents per 10,000km sewers (106 in total)	20 pollution incidents per 10,000km sewers (73 in total)
Reduce the number of properties and gardens at risk of repeated sewage flooding	368 properties & gardens in 2020	357 properties & gardens in 2025
Reduce sewage flooding of gardens or outbuildings	4,100 occasions a year	3,200 a year, a fall of 22.5%

CONSUMER COUNCIL FOR Water | CYNGOR DEFNYDDWYR Dŵr

Dŵr Cymru Welsh Water

Dŵr Cymru Welsh Water supplies 1.32 million households with water services and 1.4 million with sewerage services, through 27,500km of water pipes and 36,500km of sewers and drains.

Dŵr Cymru Welsh Water 's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water pressure for households with repeated problems. It will reduce flooding from sewers and improve the water environment. The plan also aims to improve customer service, give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Dŵr Cymru Welsh Water is investing £2.3 billion in services from 2020 to 2025
- The average bill will fall by 5% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Other services

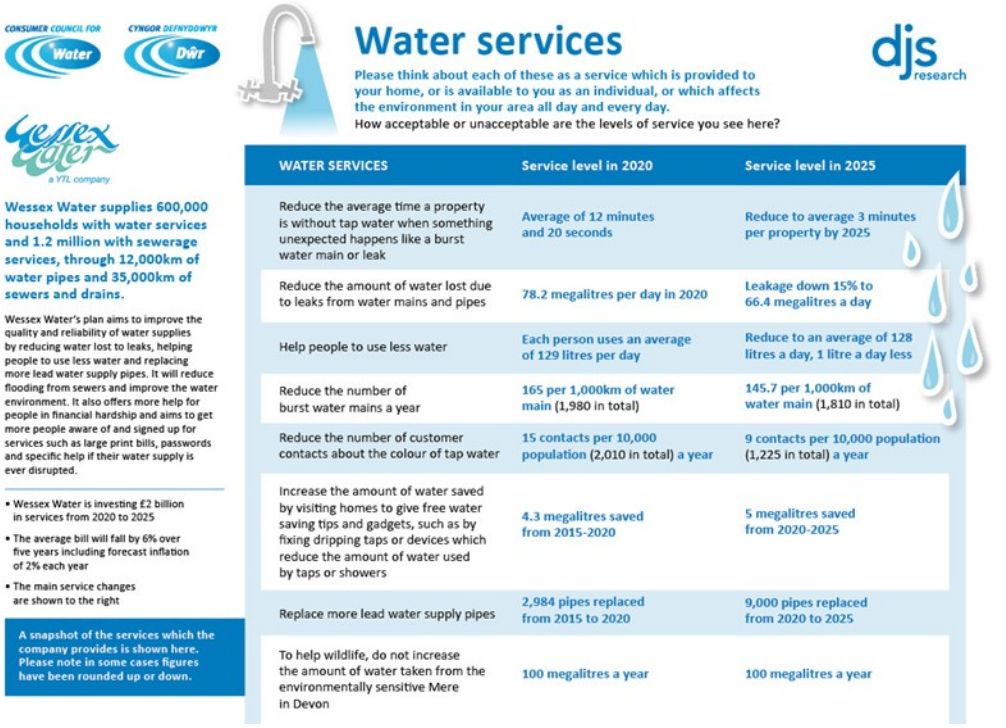
djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat
Reduce the number of written and telephone complaints	319 complaints per 10,000 customers (42,100 in total)	210 complaints per 10,000 customers (27,700 in total)

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	3.7% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	0% of records are checked	90% of records are checked
Help more customers who cannot afford their water bill	133,100 customers are helped	160,300 customers are helped

Figure 70: Wessex Water



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

Wessex Water a YTL company

Wessex Water supplies 600,000 households with water services and 1.2 million with sewerage services, through 12,000km of water pipes and 35,000km of sewers and drains.

Wessex Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead water supply pipes. It will reduce flooding from sewers and improve the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Wessex Water is investing £2 billion in services from 2020 to 2025
- The average bill will fall by 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

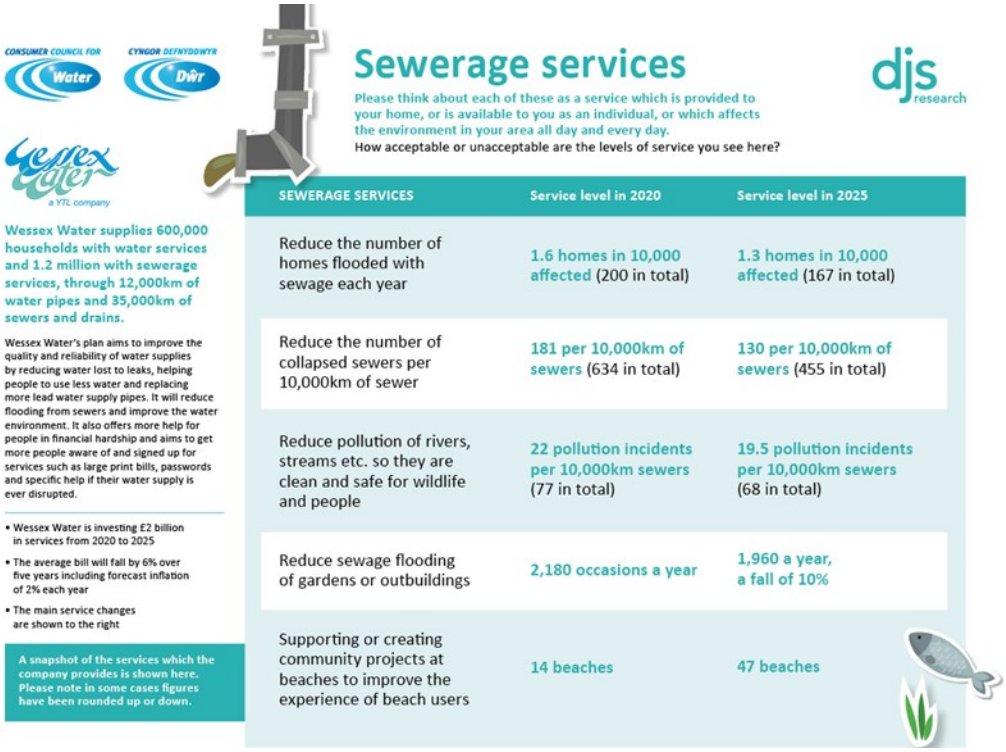
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 12 minutes and 20 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	78.2 megalitres per day in 2020	Leakage down 15% to 66.4 megalitres a day
Help people to use less water	Each person uses an average of 129 litres per day	Reduce to an average of 128 litres a day, 1 litre a day less
Reduce the number of burst water mains a year	165 per 1,000km of water main (1,980 in total)	145.7 per 1,000km of water main (1,810 in total)
Reduce the number of customer contacts about the colour of tap water	15 contacts per 10,000 population (2,010 in total) a year	9 contacts per 10,000 population (1,225 in total) a year
Increase the amount of water saved by visiting homes to give free water saving tips and gadgets, such as by fixing dripping taps or devices which reduce the amount of water used by taps or showers	4.3 megalitres saved from 2015-2020	5 megalitres saved from 2020-2025
Replace more lead water supply pipes	2,984 pipes replaced from 2015 to 2020	9,000 pipes replaced from 2020 to 2025
To help wildlife, do not increase the amount of water taken from the environmentally sensitive Mere in Devon	100 megalitres a year	100 megalitres a year



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

Wessex Water a YTL company

Wessex Water supplies 600,000 households with water services and 1.2 million with sewerage services, through 12,000km of water pipes and 35,000km of sewers and drains.

Wessex Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead water supply pipes. It will reduce flooding from sewers and improve the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Wessex Water is investing £2 billion in services from 2020 to 2025
- The average bill will fall by 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

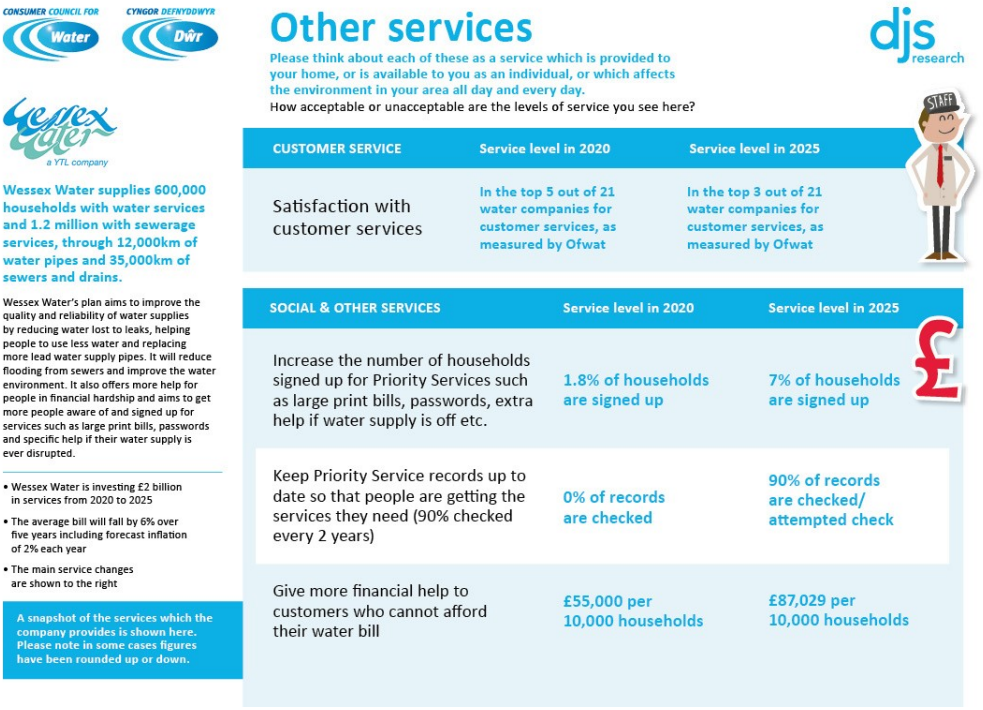
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Sewerage services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	1.6 homes in 10,000 affected (200 in total)	1.3 homes in 10,000 affected (167 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	181 per 10,000km of sewers (634 in total)	130 per 10,000km of sewers (455 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	22 pollution incidents per 10,000km sewers (77 in total)	19.5 pollution incidents per 10,000km sewers (68 in total)
Reduce sewage flooding of gardens or outbuildings	2,180 occasions a year	1,960 a year, a fall of 10%
Supporting or creating community projects at beaches to improve the experience of beach users	14 beaches	47 beaches



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

Wessex Water — a YTL company

Wessex Water supplies 600,000 households with water services and 1.2 million with sewerage services, through 12,000km of water pipes and 35,000km of sewers and drains.

Wessex Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and replacing more lead water supply pipes. It will reduce flooding from sewers and improve the water environment. It also offers more help for people in financial hardship and aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- Wessex Water is investing £2 billion in services from 2020 to 2025
- The average bill will fall by 6% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Other services

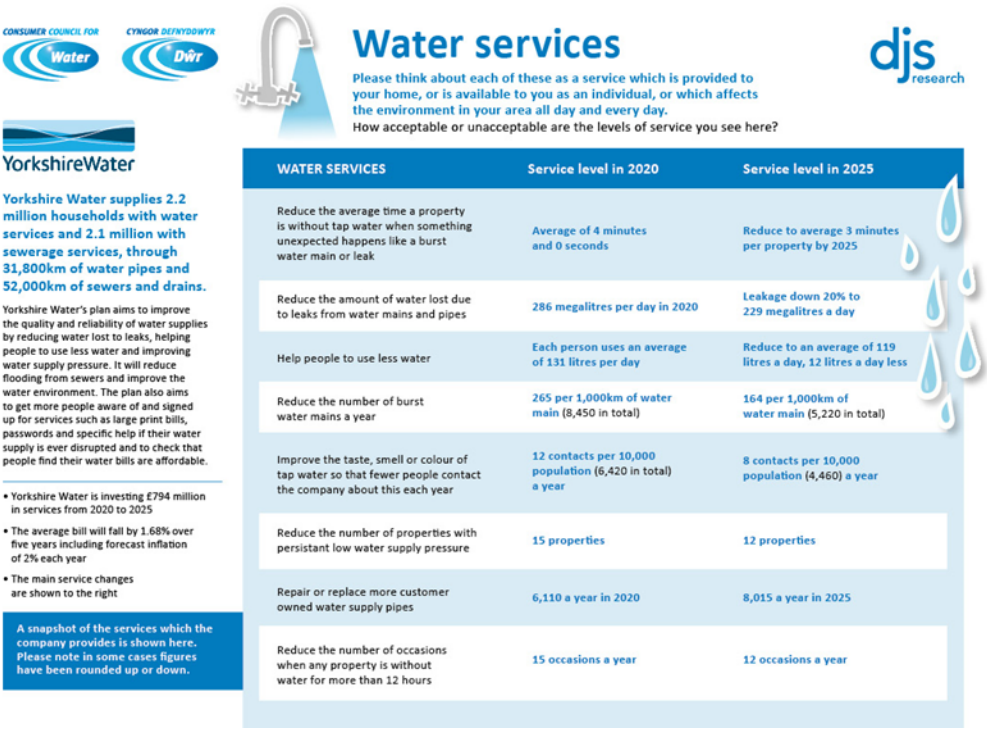
djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 3 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	1.8% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	0% of records are checked	90% of records are checked/ attempted check
Give more financial help to customers who cannot afford their water bill	£55,000 per 10,000 households	£87,029 per 10,000 households

Figure 71: Yorkshire Water



CONSUMER COUNCIL FOR Water — CYNGOR DEFNYDDWYR Dŵr

YorkshireWater

Yorkshire Water supplies 2.2 million households with water services and 2.1 million with sewerage services, through 31,800km of water pipes and 52,000km of sewers and drains.

Yorkshire Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It will reduce flooding from sewers and improve the water environment. The plan also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted and to check that people find their water bills are affordable.

- Yorkshire Water is investing £794 million in services from 2020 to 2025
- The average bill will fall by 1.68% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 4 minutes and 0 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	286 megalitres per day in 2020	Leakage down 20% to 229 megalitres a day
Help people to use less water	Each person uses an average of 131 litres per day	Reduce to an average of 119 litres a day, 12 litres a day less
Reduce the number of burst water mains a year	265 per 1,000km of water main (8,450 in total)	164 per 1,000km of water main (5,220 in total)
Improve the taste, smell or colour of tap water so that fewer people contact the company about this each year	12 contacts per 10,000 population (6,420 in total) a year	8 contacts per 10,000 population (4,460) a year
Reduce the number of properties with persistant low water supply pressure	15 properties	12 properties
Repair or replace more customer owned water supply pipes	6,110 a year in 2020	8,015 a year in 2025
Reduce the number of occasions when any property is without water for more than 12 hours	15 occasions a year	12 occasions a year

Sewerage services

djs research

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YorkshireWater

Yorkshire Water supplies 2.2 million households with water services and 2.1 million with sewerage services, through 31,800km of water pipes and 52,000km of sewers and drains.

Yorkshire Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water and improving water supply pressure. It will reduce flooding from sewers and improve the water environment. The plan also aims to get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted and to check that people find their water bills are affordable.

- Yorkshire Water is investing £794 million in services from 2020 to 2025
- The average bill will fall by 1.68% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	3 homes in 10,000 affected (582 in total)	1 home in 10,000 affected (323 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	190 per 10,000km of sewers (995 in total)	137 per 10,000km of sewers (770 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	33 pollution incidents per 10,000km sewers (174 in total)	19 pollution incidents per 10,000km sewers (102 in total)
Reduce sewage flooding of gardens or outbuildings	7,566 occasions a year	5,675 a year, a fall of 25%
Ensure that 'Good' or 'Excellent' bathing water quality is maintained at all beaches where the Environment Agency has given these ratings	18 out of 19 beaches with bathing waters designated as 'Excellent' or 'Good'	18 out of 19 beaches with bathing waters designated as 'Excellent' or 'Good'
Reduce the risk of sewer flooding in high risk areas by diverting rainwater away from sewers into natural drains where it soaks into the ground	0 hectares diverted	40 hectares diverted

Other services

djs research

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YorkshireWater

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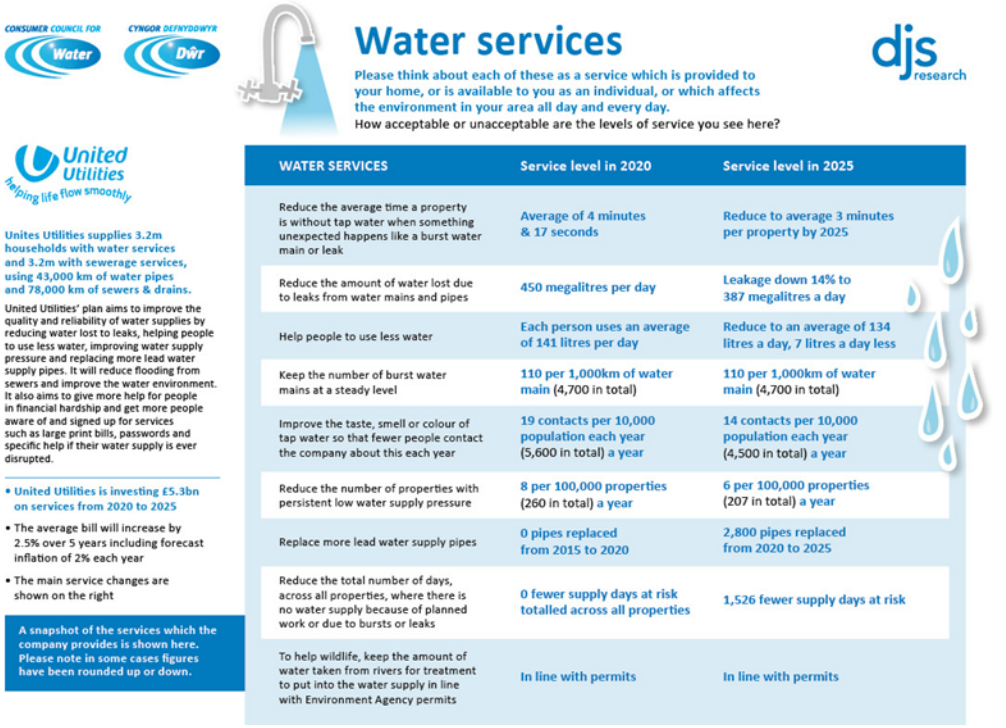
- Yorkshire Water is investing £794 million in services from 2020 to 2025
- The average bill will fall by 1.68% over five years including forecast inflation of 2% each year
- The main service changes are shown to the right

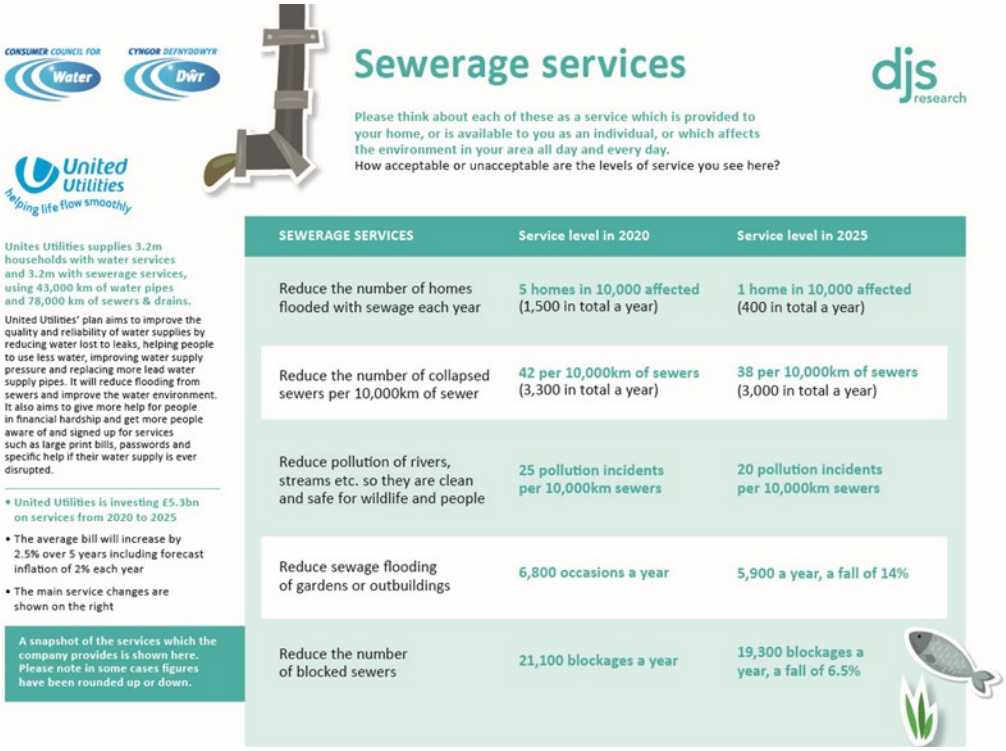
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

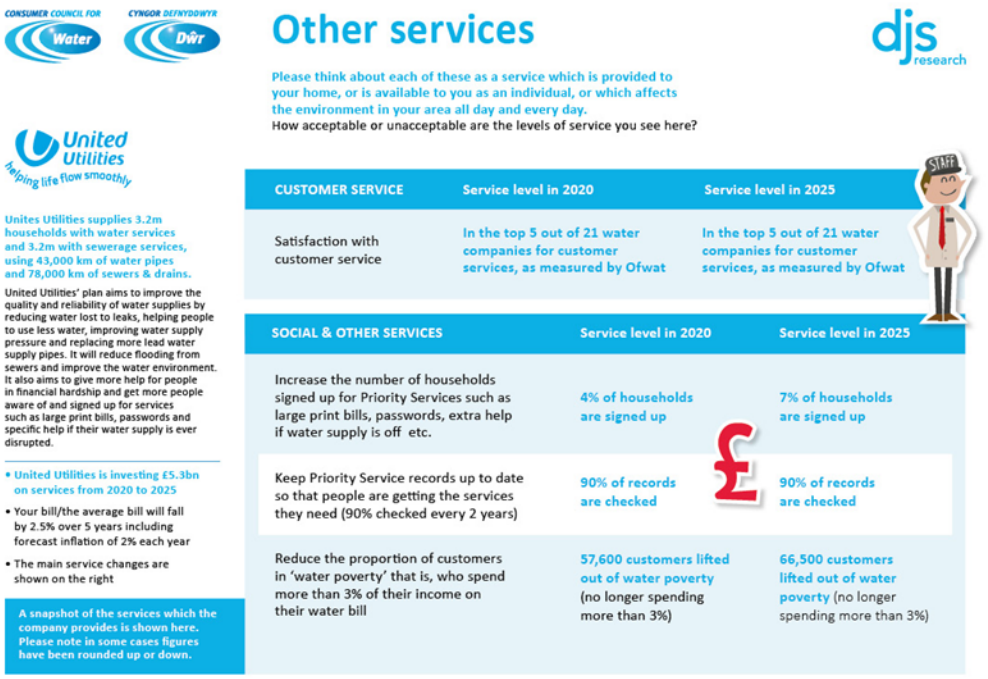
CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer services	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2.8% of households are signed up	10% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	28.7% of records are checked	90% of records are checked
An independent survey finds that more customers know they can register for Priority Services such as large print bills, passwords, extra help if the water supply is off etc.	48% aware in 2020	65% in 2025
An independent survey finds that more customers agree that their water and sewerage bills are affordable	80% agree in 2020	85% agree in 2025
Help more customers who cannot afford their water bill	40,000 customers are helped	83,000 customers are helped

Figure 72: United Utilities







Other services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

United Utilities
helping life flow smoothly

Unites Utilities supplies 3.2m households with water services and 3.2m with sewerage services, using 43,000 km of water pipes and 78,000 km of sewers & drains.

United Utilities' plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks, helping people to use less water, improving water supply pressure and replacing more lead water supply pipes. It will reduce flooding from sewers and improve the water environment. It also aims to give more help for people in financial hardship and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

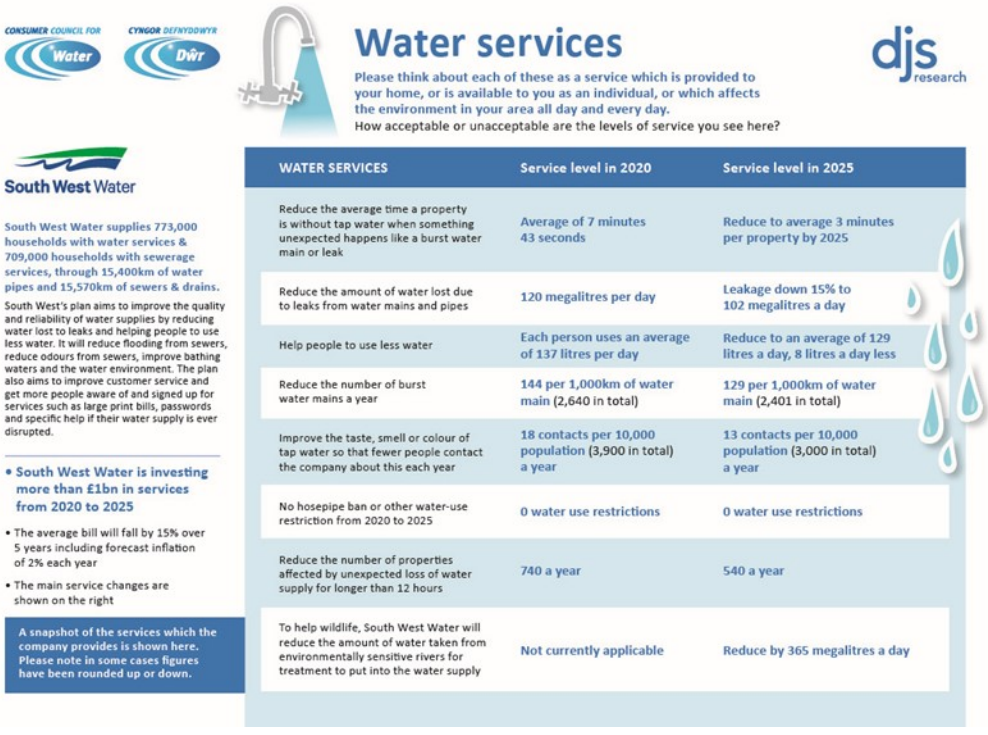
- United Utilities is investing £5.3bn on services from 2020 to 2025
- Your bill/the average bill will fall by 2.5% over 5 years including forecast inflation of 2% each year
- The main service changes are shown on the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer service	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	4% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	90% of records are checked	90% of records are checked
Reduce the proportion of customers in 'water poverty' that is, who spend more than 3% of their income on their water bill	57,600 customers lifted out of water poverty (no longer spending more than 3%)	66,500 customers lifted out of water poverty (no longer spending more than 3%)

Figure 73: South West Water



Water services

djs research

Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

South West Water

South West Water supplies 773,000 households with water services & 709,000 households with sewerage services, through 15,400km of water pipes and 15,570km of sewers & drains.

South West's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It will reduce flooding from sewers, reduce odours from sewers, improve bathing waters and the water environment. The plan also aims to improve customer service and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- South West Water is investing more than £1bn in services from 2020 to 2025
- The average bill will fall by 15% over 5 years including forecast inflation of 2% each year
- The main service changes are shown on the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

WATER SERVICES	Service level in 2020	Service level in 2025
Reduce the average time a property is without tap water when something unexpected happens like a burst water main or leak	Average of 7 minutes 43 seconds	Reduce to average 3 minutes per property by 2025
Reduce the amount of water lost due to leaks from water mains and pipes	120 megalitres per day	Leakage down 15% to 102 megalitres a day
Help people to use less water	Each person uses an average of 137 litres per day	Reduce to an average of 129 litres a day, 8 litres a day less
Reduce the number of burst water mains a year	144 per 1,000km of water main (2,640 in total)	129 per 1,000km of water main (2,401 in total)
Improve the taste, smell or colour of tap water so that fewer people contact the company about this each year	18 contacts per 10,000 population (3,900 in total) a year	13 contacts per 10,000 population (3,000 in total) a year
No hosepipe ban or other water-use restriction from 2020 to 2025	0 water use restrictions	0 water use restrictions
Reduce the number of properties affected by unexpected loss of water supply for longer than 12 hours	740 a year	540 a year
To help wildlife, South West Water will reduce the amount of water taken from environmentally sensitive rivers for treatment to put into the water supply	Not currently applicable	Reduce by 365 megalitres a day

Sewerage services

djs research

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How acceptable or unacceptable are the levels of service you see here?

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- South West Water is investing more than £1bn in services from 2020 to 2025
- The average bill will fall by 15% over 5 years including forecast inflation of 2% each year
- The main service changes are shown on the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

SEWERAGE SERVICES	Service level in 2020	Service level in 2025
Reduce the number of homes flooded with sewage each year	2 homes in 10,000 affected (135 in total)	1 home in 10,000 affected (107 in total)
Reduce the number of collapsed sewers per 10,000km of sewer	194 per 10,000km of sewers (309 in total)	140 per 10,000km of sewers (249 in total)
Reduce pollution of rivers, streams etc. so they are clean and safe for wildlife and people	46 pollution incidents per 10,000km sewers (72 in total)	20 pollution incidents per 10,000km sewers (35 in total)
Reduce sewage flooding of gardens or outbuildings	1,808 occasions a year	1,100 a year, a fall of 33%
Reduce the number of blocked sewers	7,800 blockages a year	6,500 blockages a year, a fall of 14%
Better management of smells from sewage treatment works means that fewer people make contact about this	238 contacts a year	196 contacts a year – a fall of 15%
To help wildlife, work with farmers & landowners to reduce pesticide and slurry run off into rivers and lakes	63,200 hectares of land	113,200 hectares

Other services

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Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.
How acceptable or unacceptable are the levels of service you see here?

South West Water

South West Water supplies 773,000 households with water services & 709,000 households with sewerage services, through 15,400km of water pipes and 15,570km of sewers & drains.

South West's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water. It will reduce flooding from sewers, reduce odours from sewers, improve bathing waters and the water environment. The plan also aims to improve customer service and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

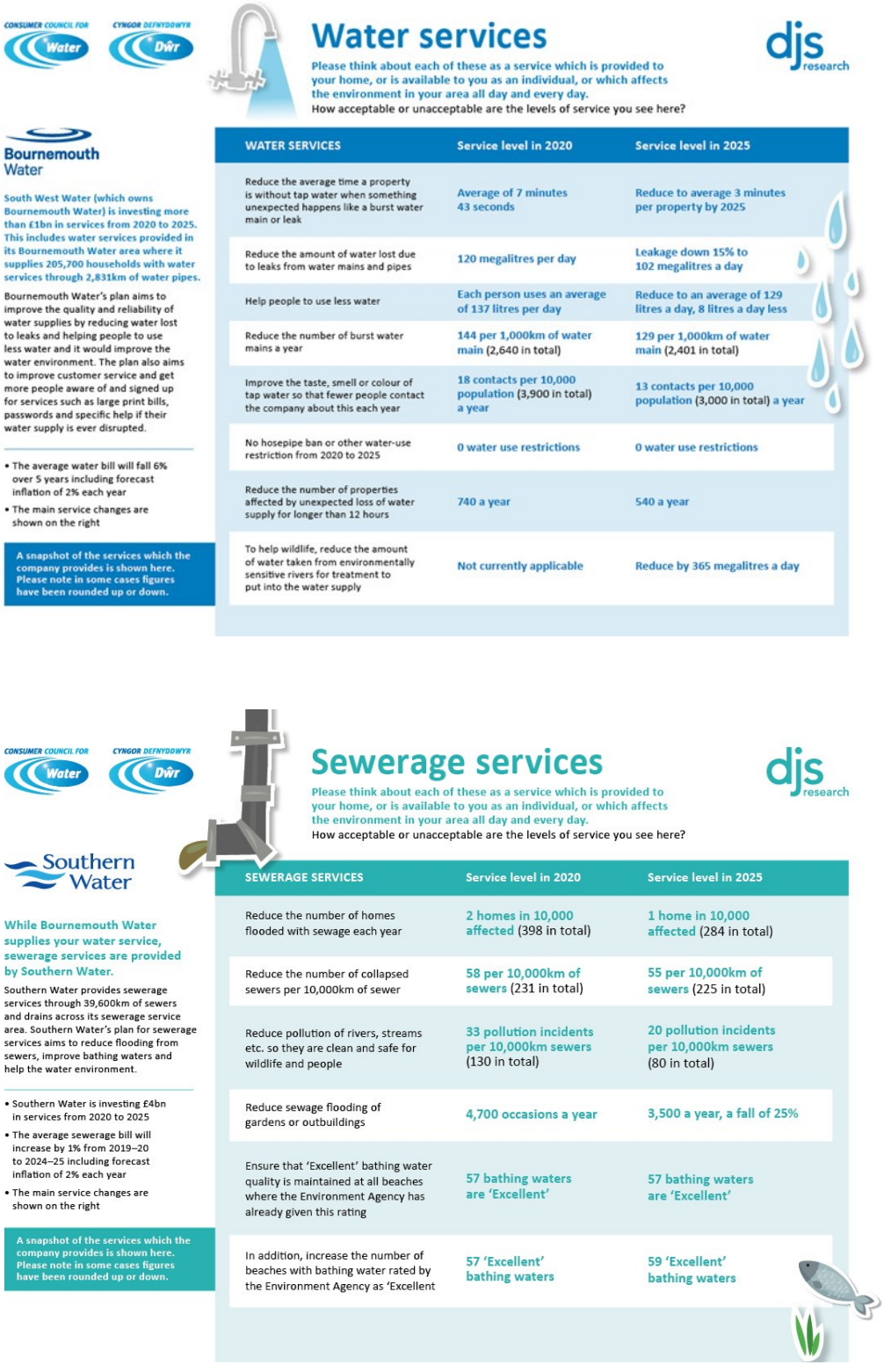
- South West Water is investing more than £1bn in services from 2020 to 2025
- The average bill will fall by 15% over 5 years including forecast inflation of 2% each year
- The main service changes are shown on the right

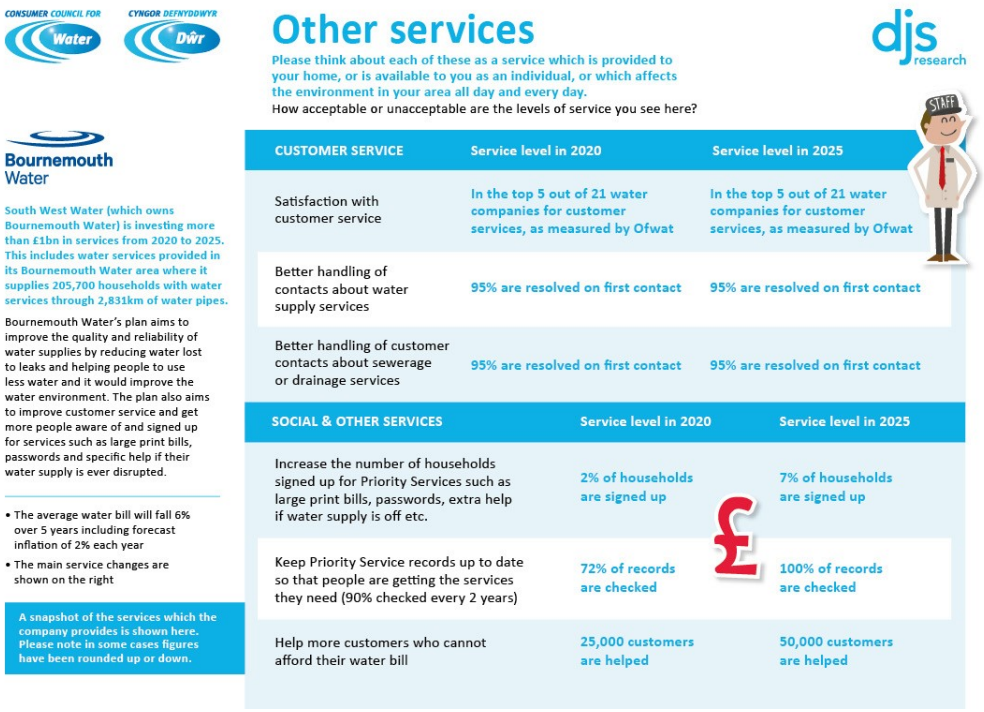
A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer service	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat
Maintain handling of contacts about water supply services	95% are resolved on first contact	95% are resolved on first contact
Maintain handling of contacts about sewerage or drainage services	95% are resolved on first contact	95% are resolved on first contact

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	72% of records are checked	100% of records are checked
Help more customers who cannot afford their water bill	25,000 customers are helped	50,000 customers are helped

Figure 74: Bournemouth Water





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Bournemouth Water

South West Water (which owns Bournemouth Water) is investing more than £1bn in services from 2020 to 2025. This includes water services provided in its Bournemouth Water area where it supplies 205,700 households with water services through 2,831km of water pipes.

Bournemouth Water's plan aims to improve the quality and reliability of water supplies by reducing water lost to leaks and helping people to use less water and it would improve the water environment. The plan also aims to improve customer service and get more people aware of and signed up for services such as large print bills, passwords and specific help if their water supply is ever disrupted.

- The average water bill will fall 6% over 5 years including forecast inflation of 2% each year
- The main service changes are shown on the right

A snapshot of the services which the company provides is shown here. Please note in some cases figures have been rounded up or down.

Other services

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Please think about each of these as a service which is provided to your home, or is available to you as an individual, or which affects the environment in your area all day and every day.

How acceptable or unacceptable are the levels of service you see here?

CUSTOMER SERVICE	Service level in 2020	Service level in 2025
Satisfaction with customer service	In the top 5 out of 21 water companies for customer services, as measured by Ofwat	In the top 5 out of 21 water companies for customer services, as measured by Ofwat
Better handling of contacts about water supply services	95% are resolved on first contact	95% are resolved on first contact
Better handling of customer contacts about sewerage or drainage services	95% are resolved on first contact	95% are resolved on first contact

SOCIAL & OTHER SERVICES	Service level in 2020	Service level in 2025
Increase the number of households signed up for Priority Services such as large print bills, passwords, extra help if water supply is off etc.	2% of households are signed up	7% of households are signed up
Keep Priority Service records up to date so that people are getting the services they need (90% checked every 2 years)	72% of records are checked	100% of records are checked
Help more customers who cannot afford their water bill	25,000 customers are helped	50,000 customers are helped

Figure 75: ODI explanation

Performance incentives

As the regulator, Ofwat monitors the performance of water companies against their targets.

To encourage them to reach their targets, Ofwat instructs companies to develop performance incentives. These are based on;

1

Missed service level targets → lower bills than the baseline plan

Bills fall where targets are missed and a much lower service is given

2

Exceeded service level targets → higher bills than the baseline plan

Bills increase where targets are beaten and a much higher service is given

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