In Association With:

WRc

Periodic Review: Customer Reseach 2003 - Company Results

Final Report

Research Study Conducted for:

Department for Environment, Food and Rural Affairs, Welsh Assembly Government, Office of Water Services, WaterVoice, Water UK, Environment Agency, Drinking Water Inspectorate, English Nature, Wildlife and Countryside Link

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Primary Author:	Paul Le Masurier
Other Author(s):	Becky Upfold
Reviewer(s):	Martin Dix

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1 Introduction

1.1 Study Background

1.1.1 In November 2004, the Office of Water Services (Ofwat) will set price limits for water and sewerage companies in England and Wales for the five years from 2005 to 2010. To inform this process, government and regulators have to decide what improvements should be made to the water environment, drinking water quality and customer service. These decisions need to take account of customers' views.

1.1.2 Other industry stakeholders, including the water companies, have a direct interest in the views of customers. The study's Steering Group comprises: Ofwat, the Department for the Environment, Food and Rural Affairs, Welsh Assembly, Water UK, Environmental Agency, The Drinking Water Inspectorate, WaterVoice, English Nature and Wildlife and Countryside Link.

1.1.3 MVA, in association with WRc, were commissioned to conduct the research into customers perceptions and willingness to pay for maintenance and improvements in water and sewerage services. A large, national survey was undertaken in September and October 2003. A representative sample of more than 6,000 customers (90% bill-payers or spouses jointly involved in the finances) was achieved.

1.2 Study Reports

1.2.1 The data has been analysed and reported at company, regional and national level.

1.2.2 This document provides a full account of the responses to every question by customers interviewed in each of the 23 company areas.

1.2.3 A separate MVA report[1] provides a national overview of the findings, highlighting significant variations at company level. It also sets out the specific objectives of the research and describes the survey methodology.

1.3 Contents of this Report

1.3.1 There are 23 subsequent sections to this report, one for each water company. For each company, we have provided:

- a summary of key findings and conclusions, specific to each company;
- a description of how, using show-cards, each company's proposals for the period 2005-2010 (in terms of service improvements and price increases) were presented to customers; and
- reports of the perceptions and attitudes of customers. Customers' responses are reported in relation to several key policy themes.

1.3.2 The themes addressed in this report are as follows:

- how satisfied are customers with their current provision of water and sewerage services?
- how important is it to maintain each element of service provision, and how important is it to have further improvements?

[1] Periodic Review: Customer Research 2003 – National Report, Final Report, MVA Ltd (Dec, 2003)

- how are each company's plans perceived, in terms of value for money, compared with the current service?
- are customers willing to pay for the company's proposed plans, and are there some costed elements that customers are particularly keen to see, and others that they would rather not?
- how important is the pace of delivery of improved services? And
- what bill profile do customers want?

1.3.3 Table 1 shows the order in which these company findings are set out in the report:

Table 1 Sequence of Company Reports

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

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

1.3.5 For example, customers' reactions to Severn Trent Water's proposals concerning water services are provided in Section 11, which reports the views of just over 400 water and sewerage service customers. Customers' reactions to Severn Trent Water's proposals concerning sewerage services are provided in Section 11, for the 400 customers receiving both water and sewerage service, and Section 12 reports the responses of a further 200 customers receiving sewerage services from Severn Trent but water services from South Staffordshire Water. .

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

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

1.3.7 To aid company comparisons, customer reaction to each question, in turn, is reported by company, region and nationally in Appendix B of the National Report.

1.3.8 A copy of the questionnaire is in Appendix A of the National Report.

1. Key Findings

Anglian Water is a water and sewerage company serving a population of 4.3 million customers with water and 5.9 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £102
Reference Plan A - £84
Reference Plan B - £106

☐ 77% of customers stated that they were satisfied with the services provided by Anglian Water, with 54% regarding this service as good value for money. 12% of customers indicated that they are dissatisfied with the service and 19% expressed the view that the service was poor value for money.

☐ Customers indicated that it was more important to maintain current levels of service than to introduce improvements. When considering improvements 'maintaining sewerage pipes, treatment works and reservoirs' (77%) and 'avoiding the risk of homes and gardens being flooded with sewage' (74%) were considered most important and 'Handling customer accounts, queries, complaints and customers with special needs' least important (55%).

☐ Customers indicated that they regarded the Company’s Preferred Plans for 'ensuring the safety of tap water' (60%-63%) as the most important priority and this is evident across all three business plan proposals (each of which proposed a combination of maintained and improved services). Following this element, Anglian customers would most like to see proposed outputs for 'managing the appearance, taste and smell of tap water' (55%-58%) and then 'ensuring a reliable and continuous water supply' (54%- 56%).

☐ 61% of customers indicated that they did not wish to see any improvement in addition to those in the proposed plans. However, 11% would like to see further improvement in 'managing the appearance, taste and smell of tap water', and 10% would like to further improvement to 'maintaining sewers and sewage treatment works, ensuring the network meets new demands and controlling smells from sewage works'.

☐ A greater proportion of customers indicated that Plan A was good value for money than the Company Preferred Plan and Plan B. Plan A was regarded as good value by 31% and as poor value by 54% of customers. 34% of customers said that the Company Preferred Plan represented good value for money whilst 45% stated that it represents poor value for money. Plan B was regarded as poor value for money by 54% of customers, and good value by 31%.

☐ When considering the three plans, customers were fairly evenly divided between 'willing to pay' and 'not willing to pay'. The proportion of customers 'willing to pay' ranged between 47% for Reference Plan B (40% probably willing, 7% definitely willing), 52% for the Company Preferred Plan (47% probably willing, 5% definitely willing) and 54% for Reference Plan A (46% probably willing, 8% definitely willing). Of those 'not willing to pay' the split was between 'definitely' and 'probably not willing' was approximately half For Reference Plan B, 50% of customers indicated that they were not willing to pay (25% definitely not willing, 25% probably not willing),whilst for the Company Preferred Plan 45% were not willing to pay (24% definitely not willing, 21% probably not willing). For Reference Plan A, 42% were not willing to pay (20% definitely not willing, 22% probably not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'costs were too much for the improvements' (47% for Company Preferred Plan, 46% for Reference Plan A and 50% for Reference Plan B). Between 16% and 18% of all Anglian customers indicated that they could not afford to pay the proposed bill increases in the three plans (16% for the Company Preferred Plan, 18% for Reference Plan A and 17% for Reference Plan B).

☐ 43% of customers indicated that they would be concerned if some of the improvements had to be delayed until after 2010, and 49% would not be concerned. Delays to improvements in the safety of tap water (16%) would cause the greatest concern.

☐ 74% of Anglian Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £5-£6/annum), 'managing the appearance, taste and smell of tap water' (£3/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£41-43/annum).

2. Introduction

The attitudes and preferences of Anglian Water customers, reported in section 3, are based on a sample of 263 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty five years
	3. Ensuring the safety of tap water	99.89% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 19,722 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	185 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 99.5% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	334 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	5 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	80% of rivers are of good, 10% fair and 10% poor quality. 100% of designated bathing waters meet minimum standards and 57% meet higher standards. 52% of rivers may be at risk from weed growth that can adversely affect wildlife.

- Average bill in this area = £273 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	1%	1%	0%	0%
Very dissatisfied	4%	5%	3%	0%	4%	2%	8%	4%	4%	4%	5%	3%	0%	6%	4%	3%	6%	2%	5%	4%	3%
Fairly dissatisfied	8%	4%	12%	0%	5%	15%	2%	8%	9%	8%	11%	6%	0%	9%	8%	5%	7%	10%	2%	12%	8%
Neither satisfied nor dissatisfied	10%	11%	9%	11%	14%	7%	5%	14%	8%	8%	5%	15%	0%	6%	8%	3%	15%	13%	11%	3%	21%
Fairly satisfied	38%	39%	38%	22%	35%	43%	37%	47%	33%	36%	38%	38%	51%	31%	38%	38%	48%	37%	38%	40%	33%
Very satisfied	30%	30%	30%	54%	29%	24%	39%	20%	34%	34%	31%	27%	49%	39%	33%	37%	22%	25%	24%	34%	27%
Extremely satisfied	9%	10%	9%	13%	12%	6%	9%	5%	12%	10%	8%	10%	0%	10%	8%	12%	3%	11%	16%	6%	8%
Dont know/cant say	1%	2%	0%	0%	1%	1%	0%	2%	1%	0%	2%	0%	0%	0%	0%	2%	0%	2%	2%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	2%	2%	15%	0%	4%	0%	2%	1%	4%	3%	1%	0%	5%	2%	0%	0%	2%	7%	1%	0%
Very poor value	6%	3%	10%	0%	7%	7%	5%	4%	6%	9%	8%	5%	0%	7%	7%	5%	4%	8%	6%	4%	13%
Fairly poor value	11%	9%	13%	0%	10%	14%	8%	5%	14%	13%	11%	11%	0%	17%	9%	18%	2%	10%	8%	10%	13%
Neither poor nor good value	23%	23%	22%	11%	24%	26%	12%	29%	24%	14%	19%	26%	25%	14%	15%	19%	33%	26%	22%	23%	23%
Fairly good value	38%	47%	28%	38%	36%	35%	49%	42%	33%	38%	35%	40%	49%	35%	46%	29%	41%	36%	37%	38%	37%
Very good value	14%	10%	17%	36%	14%	8%	22%	9%	15%	17%	16%	12%	0%	15%	16%	19%	10%	12%	14%	14%	13%
Extremely good value	2%	1%	3%	0%	2%	2%	3%	2%	1%	3%	3%	1%	0%	5%	2%	7%	0%	0%	1%	4%	0%
Dont know/cant say	5%	5%	5%	0%	8%	4%	1%	7%	5%	2%	6%	4%	25%	2%	2%	3%	11%	6%	5%	7%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	90%	91%	89%	85%	91%	88%	95%	86%	92%	93%	90%	90%	100%	91%	94%	89%	96%	85%	89%	89%	93%
Ensuring a reliable & continuous water supply	93%	97%	90%	85%	97%	92%	90%	91%	95%	94%	92%	94%	100%	86%	95%	95%	100%	92%	90%	96%	91%
Ensuring the safety of tap water	92%	90%	94%	85%	92%	92%	93%	87%	92%	97%	92%	92%	100%	91%	98%	90%	96%	87%	83%	95%	93%
Managing the appearance, taste & smell of tap water	87%	89%	86%	85%	91%	86%	83%	82%	85%	95%	85%	89%	100%	91%	90%	88%	92%	81%	79%	92%	86%
Managing the pressure of water in your taps & the number of unplanned interruptions	86%	93%	79%	85%	85%	86%	87%	84%	85%	88%	83%	88%	100%	81%	90%	80%	96%	82%	79%	86%	91%
Handling customers' accounts, queries, complaints & customers with special needs	79%	76%	83%	85%	82%	79%	72%	71%	86%	81%	74%	83%	100%	79%	75%	84%	84%	77%	76%	78%	86%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	88%	92%	84%	85%	90%	85%	91%	84%	86%	95%	86%	89%	100%	88%	91%	78%	93%	88%	77%	91%	92%
Avoid the risk of homes & gardens being flooded with sewerage	88%	92%	85%	74%	87%	88%	95%	83%	89%	94%	87%	90%	68%	90%	95%	81%	87%	88%	82%	92%	87%
Managing the amount of water taken from the environment to supply customers	88%	93%	82%	85%	86%	91%	87%	90%	91%	83%	90%	85%	100%	82%	85%	89%	96%	88%	90%	89%	84%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	83%	85%	81%	85%	85%	79%	85%	80%	88%	80%	85%	81%	100%	71%	93%	86%	85%	82%	85%	87%	73%
No of respondents	255	127	129	7	106	96	44	82	93	81	124	129	2	47	47	34	46	82	58	132	63

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	64%	70%	59%	62%	61%	66%	67%	69%	63%	60%	65%	63%	67%	60%	68%	52%	76%	63%	53%	71%	58%
Ensuring a reliable & continuous water supply	64%	66%	62%	73%	67%	60%	69%	61%	66%	66%	65%	64%	51%	64%	67%	60%	69%	62%	49%	74%	55%
Ensuring the safety of tap water	69%	74%	65%	63%	71%	68%	73%	66%	73%	68%	67%	72%	51%	64%	77%	63%	73%	69%	66%	76%	58%
Managing the appearance, taste & smell of tap water	77%	75%	78%	85%	78%	75%	76%	73%	78%	78%	78%	74%	100%	72%	78%	72%	86%	74%	67%	86%	64%
Managing the pressure of water in your taps & the number of unplanned interruptions	60%	63%	58%	62%	58%	63%	60%	65%	61%	56%	59%	61%	51%	53%	55%	61%	71%	61%	64%	62%	54%
Handling customers' accounts, queries, complaints & customers with special needs	55%	55%	56%	64%	52%	57%	59%	55%	56%	54%	55%	56%	51%	58%	51%	52%	56%	58%	54%	58%	53%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	77%	74%	80%	75%	73%	80%	81%	73%	75%	83%	74%	80%	51%	79%	77%	73%	79%	76%	60%	82%	79%
Avoid the risk of homes & gardens being flooded with sewerage	74%	73%	75%	74%	70%	77%	75%	69%	74%	78%	72%	75%	75%	78%	73%	54%	90%	70%	64%	78%	71%
Managing the amount of water taken from the environment to supply customers	62%	65%	60%	85%	63%	60%	62%	71%	58%	58%	59%	65%	51%	56%	57%	57%	72%	65%	63%	67%	54%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	66%	64%	68%	70%	65%	68%	64%	80%	61%	58%	70%	63%	51%	62%	59%	68%	74%	67%	66%	76%	47%
No of respondents	244	121	123	7	99	95	41	80	85	79	117	124	3	46	47	33	43	75	50	132	60

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	50%	56%	44%	61%	53%	47%	48%	48%	56%	44%	46%	53%	75%	39%	58%	56%	54%	46%	48%	46%	59%
Ensuring a reliable & continuous water supply	54%	62%	46%	72%	53%	56%	53%	55%	58%	49%	49%	58%	75%	39%	72%	59%	57%	49%	52%	53%	58%
Ensuring the safety of tap water	62%	69%	55%	61%	66%	64%	53%	62%	66%	57%	61%	63%	75%	53%	72%	65%	72%	56%	67%	61%	59%
Managing the appearance, taste & smell of tap water	55%	59%	52%	62%	55%	58%	52%	50%	60%	55%	54%	56%	75%	51%	53%	56%	64%	54%	69%	52%	48%
Managing the pressure of water in your taps & the number of unplanned interruptions	49%	50%	48%	40%	51%	52%	40%	44%	53%	49%	48%	49%	75%	44%	52%	54%	57%	44%	49%	47%	53%
Handling customers' accounts, queries, complaints & customers with special needs	41%	44%	38%	50%	43%	42%	34%	34%	44%	45%	41%	40%	75%	42%	45%	48%	42%	36%	33%	42%	49%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	52%	53%	51%	61%	53%	54%	42%	54%	56%	45%	53%	50%	75%	41%	60%	68%	61%	42%	34%	57%	60%
Avoid the risk of homes & gardens being flooded with sewerage	45%	49%	40%	61%	42%	47%	44%	41%	49%	44%	42%	46%	75%	41%	52%	56%	51%	35%	30%	47%	53%
Managing the amount of water taken from the environment to supply customers	46%	51%	41%	61%	46%	50%	33%	45%	53%	38%	44%	46%	100%	37%	51%	51%	55%	41%	46%	45%	48%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	45%	49%	42%	61%	48%	49%	32%	44%	53%	38%	41%	49%	75%	36%	46%	56%	53%	42%	44%	42%	54%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	51%	56%	47%	61%	56%	48%	50%	44%	61%	48%	47%	55%	75%	39%	68%	47%	54%	50%	50%	47%	59%
Ensuring a reliable & continuous water supply	56%	63%	50%	72%	57%	56%	54%	56%	62%	50%	52%	60%	75%	39%	78%	55%	57%	54%	56%	54%	59%
Ensuring the safety of tap water	63%	70%	56%	61%	70%	62%	51%	63%	69%	56%	62%	64%	75%	47%	82%	58%	74%	58%	69%	63%	57%
Managing the appearance, taste & smell of tap water	57%	61%	54%	72%	61%	56%	49%	51%	65%	53%	53%	60%	75%	47%	61%	52%	68%	57%	67%	55%	51%
Managing the pressure of water in your taps & the number of unplanned interruptions	52%	55%	49%	40%	56%	53%	46%	49%	56%	51%	52%	52%	75%	45%	67%	49%	59%	46%	53%	51%	52%
Handling customers' accounts, queries, complaints & customers with special needs	47%	51%	42%	40%	50%	46%	42%	41%	48%	51%	45%	48%	75%	45%	60%	43%	50%	40%	39%	47%	53%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	53%	52%	53%	61%	56%	53%	43%	55%	56%	47%	52%	53%	75%	42%	66%	59%	66%	43%	37%	57%	61%
Avoid the risk of homes & gardens being flooded with sewerage	50%	54%	47%	61%	54%	49%	44%	54%	54%	42%	48%	52%	75%	37%	65%	60%	61%	39%	38%	51%	59%
Managing the amount of water taken from the environment to supply customers	45%	49%	42%	61%	49%	48%	30%	44%	52%	39%	39%	50%	100%	39%	45%	37%	61%	44%	41%	45%	50%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	44%	46%	41%	61%	49%	47%	25%	39%	51%	40%	39%	48%	75%	40%	44%	40%	58%	40%	36%	43%	53%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	50%	55%	46%	61%	53%	49%	47%	46%	56%	48%	44%	56%	75%	40%	60%	52%	50%	50%	51%	44%	63%
Ensuring a reliable & continuous water supply	55%	60%	49%	61%	54%	56%	53%	56%	58%	49%	48%	60%	75%	42%	68%	58%	54%	53%	55%	51%	62%
Ensuring the safety of tap water	60%	65%	55%	50%	65%	60%	53%	57%	66%	56%	56%	63%	75%	50%	70%	58%	62%	60%	65%	58%	60%
Managing the appearance, taste & smell of tap water	58%	63%	53%	61%	61%	61%	45%	59%	61%	52%	57%	58%	75%	50%	55%	52%	73%	58%	67%	55%	54%
Managing the pressure of water in your taps & the number of unplanned interruptions	51%	53%	50%	40%	53%	53%	45%	49%	52%	52%	49%	53%	75%	45%	57%	53%	57%	48%	51%	50%	55%
Handling customers' accounts, queries, complaints & customers with special needs	45%	49%	40%	40%	47%	46%	39%	39%	44%	51%	41%	47%	75%	46%	53%	44%	44%	40%	37%	43%	55%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	53%	49%	56%	50%	57%	53%	42%	57%	53%	47%	52%	53%	75%	40%	61%	59%	62%	47%	35%	56%	62%
Avoid the risk of homes & gardens being flooded with sewerage	48%	50%	46%	50%	51%	50%	39%	54%	48%	44%	46%	50%	75%	37%	58%	50%	63%	41%	36%	48%	62%
Managing the amount of water taken from the environment to supply customers	44%	46%	42%	46%	46%	51%	24%	48%	46%	37%	38%	49%	75%	37%	47%	35%	56%	44%	42%	40%	53%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	44%	45%	43%	46%	49%	48%	26%	47%	48%	38%	38%	49%	75%	37%	40%	38%	56%	47%	39%	41%	55%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	6%
Ensuring a reliable & continuous water supply	3%
Ensuring the safety of tap water	8%
Managing the appearance, taste & smell of tap water	11%
Managing the pressure of water in your taps & the number of unplanned interruptions	5%
Handling customers' accounts, queries, complaints & customers with special needs	6%
Maintaining sewers & sewerage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	10%
Avoid the risk of homes & gardens being flooded with sewerage	8%
Managing the amount of water taken from the environment to supply customers	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	5%
(further) reduce sewerage treatment works smells	6%
(further) reduce limescale in water	4%
Upgrade water pipes	1%
(further) reduce sewerage drainage problems	1%
Reduce risk of flood	1%
Introduce option of having a water meter	1%
(further) improve cleanliness of the rivers	1%
No, none	61%
No of respondents	263

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	11%	9%	13%	11%	6%	19%	3%	16%	9%	8%	9%	13%	0%	9%	6%	3%	13%	17%	16%	4%	20%
Very poor value	14%	12%	16%	0%	20%	8%	15%	18%	8%	17%	12%	16%	0%	21%	9%	10%	15%	14%	10%	10%	25%
Fairly poor value	20%	20%	20%	28%	18%	24%	17%	16%	23%	21%	20%	20%	49%	16%	27%	22%	23%	17%	10%	29%	13%
Neither poor nor good value	20%	22%	18%	24%	25%	11%	27%	17%	20%	22%	19%	21%	0%	24%	19%	19%	14%	21%	19%	19%	22%
Fairly good value	26%	32%	19%	37%	23%	29%	21%	27%	28%	21%	29%	22%	51%	14%	28%	39%	28%	24%	35%	25%	17%
Very good value	6%	3%	8%	0%	5%	5%	10%	4%	8%	5%	5%	6%	0%	8%	4%	7%	5%	5%	5%	8%	2%
Extremely good value	2%	0%	5%	0%	2%	2%	5%	2%	1%	5%	4%	1%	0%	4%	8%	0%	0%	1%	4%	3%	0%
Dont know/cant say	1%	1%	2%	0%	0%	3%	2%	0%	3%	1%	1%	1%	0%	4%	0%	0%	2%	1%	1%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	10%	9%	11%	0%	6%	18%	2%	14%	6%	11%	7%	13%	0%	13%	6%	3%	6%	16%	17%	1%	22%
Very poor value	13%	11%	16%	26%	13%	12%	13%	15%	10%	16%	14%	13%	25%	21%	5%	10%	19%	13%	2%	12%	28%
Fairly poor value	17%	18%	17%	0%	19%	16%	22%	21%	18%	13%	17%	17%	24%	15%	10%	24%	18%	20%	18%	22%	7%
Neither poor nor good value	17%	19%	15%	13%	21%	11%	25%	11%	20%	20%	17%	17%	0%	15%	27%	12%	18%	14%	14%	21%	14%
Fairly good value	29%	33%	24%	50%	32%	28%	21%	30%	32%	23%	30%	27%	51%	21%	36%	32%	31%	26%	37%	26%	24%
Very good value	8%	7%	8%	11%	8%	5%	12%	3%	9%	11%	8%	8%	0%	7%	7%	12%	5%	7%	9%	10%	2%
Extremely good value	3%	0%	7%	0%	2%	5%	4%	4%	3%	4%	6%	1%	0%	4%	8%	7%	0%	1%	2%	5%	0%
Dont know/cant say	2%	3%	2%	0%	0%	5%	2%	2%	3%	2%	1%	4%	0%	4%	2%	0%	2%	3%	1%	2%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	262	130	132	7	107	102	44	83	96	83	127	131	3	47	48	34	46	88	64	132	64

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	17%	18%	16%	11%	15%	22%	8%	23%	13%	16%	15%	20%	0%	20%	10%	11%	17%	22%	18%	10%	32%
Very poor value	17%	14%	21%	15%	16%	16%	23%	20%	14%	18%	20%	15%	25%	21%	12%	13%	23%	17%	14%	17%	19%
Fairly poor value	20%	21%	19%	37%	24%	14%	21%	21%	24%	15%	20%	20%	24%	22%	20%	27%	16%	18%	12%	28%	12%
Neither poor nor good value	14%	18%	10%	4%	15%	13%	18%	9%	14%	20%	13%	17%	0%	14%	18%	16%	20%	9%	13%	14%	16%
Fairly good value	22%	18%	25%	22%	22%	25%	14%	21%	23%	21%	22%	21%	25%	13%	26%	31%	14%	25%	30%	20%	17%
Very good value	6%	8%	4%	11%	6%	4%	8%	2%	8%	6%	5%	5%	25%	5%	4%	2%	5%	8%	6%	7%	3%
Extremely good value	3%	2%	3%	0%	1%	4%	5%	4%	1%	3%	4%	1%	0%	2%	10%	0%	2%	1%	7%	2%	0%
Dont know/cant say	1%	1%	2%	0%	0%	3%	2%	0%	3%	1%	1%	1%	0%	4%	0%	0%	2%	1%	1%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	132	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	131	64

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	24%	25%	22%	26%	21%	29%	18%	28%	17%	27%	16%	31%	24%	34%	24%	10%	21%	25%	28%	17%	33%
Probably not willing to pay	21%	17%	24%	13%	17%	22%	28%	20%	22%	20%	22%	20%	0%	19%	22%	14%	22%	23%	9%	25%	26%
Probably willing to pay	47%	51%	43%	49%	56%	40%	42%	48%	51%	42%	51%	42%	76%	35%	42%	74%	46%	45%	54%	51%	31%
Definitely willing to pay	5%	3%	6%	12%	4%	4%	5%	4%	6%	4%	7%	3%	0%	3%	8%	2%	9%	2%	5%	6%	2%
Dont know/Cant say	4%	3%	5%	0%	3%	5%	7%	0%	4%	8%	4%	4%	0%	9%	4%	0%	2%	4%	3%	2%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	6%	3%	9%	29%	7%	4%	4%	11%	5%	2%	12%	1%	0%	3%	0%	0%	27%	2%	0%	9%	5%
Cost too much for improvement	47%	48%	46%	0%	50%	51%	42%	52%	70%	20%	52%	43%	100%	15%	48%	59%	53%	60%	66%	49%	31%
Cant afford it	39%	40%	38%	71%	32%	34%	54%	18%	23%	76%	34%	43%	0%	82%	47%	21%	10%	26%	34%	40%	41%
Dont know/Cant say	8%	9%	8%	0%	10%	11%	0%	19%	2%	3%	2%	13%	0%	0%	5%	20%	10%	12%	0%	2%	23%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	116	55	61	3	40	52	19	40	37	38	49	66	1	25	21	8	20	42	23	54	37

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	20%	20%	21%	26%	16%	27%	12%	20%	15%	26%	13%	27%	49%	28%	16%	7%	19%	24%	27%	12%	31%
Probably not willing to pay	22%	24%	20%	13%	16%	21%	41%	24%	21%	22%	25%	21%	0%	29%	25%	21%	19%	19%	17%	23%	26%
Probably willing to pay	46%	46%	46%	50%	60%	36%	35%	45%	52%	41%	50%	42%	51%	36%	51%	61%	46%	43%	46%	54%	29%
Definitely willing to pay	8%	6%	9%	11%	5%	10%	7%	9%	8%	6%	9%	6%	0%	3%	6%	8%	14%	8%	8%	9%	5%
Dont know/Cant say	4%	3%	4%	0%	2%	6%	5%	2%	4%	5%	3%	4%	0%	3%	2%	3%	2%	6%	2%	2%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	7%	1%	13%	29%	14%	5%	0%	12%	10%	0%	11%	4%	0%	0%	5%	0%	29%	5%	3%	9%	7%
Cost too much for improvement	46%	53%	39%	0%	46%	50%	43%	59%	61%	21%	52%	41%	100%	19%	51%	56%	49%	59%	52%	49%	38%
Cant afford it	42%	42%	42%	71%	35%	40%	54%	20%	26%	77%	33%	50%	0%	78%	44%	27%	11%	34%	42%	39%	45%
Dont know/Cant say	5%	3%	6%	0%	5%	5%	4%	10%	2%	2%	4%	6%	0%	3%	0%	17%	11%	2%	3%	2%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	112	57	54	3	36	49	23	37	36	39	47	63	2	27	20	9	18	38	29	46	37

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	25%	30%	20%	26%	22%	30%	20%	30%	18%	29%	20%	30%	49%	35%	26%	10%	21%	28%	32%	17%	35%
Probably not willing to pay	25%	22%	28%	24%	26%	23%	29%	24%	28%	23%	26%	25%	0%	25%	27%	33%	32%	18%	11%	32%	26%
Probably willing to pay	40%	38%	42%	50%	45%	36%	38%	37%	44%	40%	43%	38%	51%	31%	36%	57%	36%	43%	46%	43%	29%
Definitely willing to pay	7%	7%	6%	0%	5%	9%	7%	9%	6%	6%	9%	5%	0%	6%	9%	0%	9%	7%	8%	7%	6%
Dont know/Cant say	3%	2%	3%	0%	2%	2%	7%	0%	5%	3%	3%	2%	0%	3%	2%	0%	2%	4%	3%	2%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	7%	3%	12%	22%	10%	4%	0%	10%	9%	2%	9%	5%	0%	3%	4%	0%	24%	4%	0%	7%	12%
Cost too much for improvement	50%	56%	43%	22%	58%	53%	34%	60%	66%	23%	52%	47%	100%	18%	57%	57%	59%	60%	53%	53%	43%
Cant afford it	37%	36%	39%	55%	24%	38%	62%	17%	24%	73%	32%	43%	0%	75%	39%	18%	9%	33%	44%	35%	36%
Dont know/Cant say	6%	6%	6%	0%	8%	5%	4%	13%	2%	2%	7%	5%	0%	3%	0%	25%	9%	2%	3%	5%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	127	68	59	4	48	52	21	43	42	42	55	70	2	28	22	14	22	40	27	60	40

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Not at all concerned	22%	24%	20%	24%	18%	18%	40%	15%	26%	24%	27%	17%	49%	24%	29%	17%	11%	25%	33%	20%	13%
Not very concerned	27%	27%	26%	0%	28%	27%	24%	26%	22%	33%	26%	28%	0%	28%	24%	26%	42%	19%	16%	31%	28%
Fairly concerned	19%	16%	22%	33%	23%	18%	12%	18%	26%	13%	22%	17%	25%	17%	19%	28%	26%	13%	17%	22%	15%
Very concerned	24%	26%	23%	13%	26%	28%	13%	39%	17%	18%	20%	28%	25%	17%	23%	23%	22%	31%	20%	21%	36%
Dont know/cant say	8%	7%	9%	30%	4%	9%	12%	2%	9%	13%	6%	10%	0%	14%	5%	6%	0%	12%	13%	6%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	4%	1%	7%	0%	6%	3%	2%	5%	5%	1%	5%	3%	0%	4%	4%	0%	7%	4%	0%	4%	6%
Ensuring a reliable & continuous water supply	4%	4%	4%	0%	6%	1%	8%	8%	2%	2%	7%	1%	0%	0%	10%	3%	4%	3%	6%	3%	3%
Ensuring the safety of tap water	16%	15%	18%	22%	23%	12%	10%	21%	19%	9%	18%	15%	0%	12%	14%	29%	20%	13%	11%	17%	20%
Managing the appearance, taste & smell of tap water	4%	4%	4%	22%	4%	4%	2%	5%	5%	2%	3%	5%	0%	5%	0%	2%	6%	6%	7%	4%	1%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	1%	0%	0%	2%	0%	0%	2%	0%	0%	2%	0%	0%	0%	0%	0%	4%	0%	0%	1%	0%
Handling customers' accounts, queries, complaints & customers with special needs	1%	1%	0%	0%	0%	2%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	0%	2%	3%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	9%	7%	10%	0%	10%	8%	8%	9%	11%	6%	9%	8%	0%	6%	13%	5%	10%	9%	9%	8%	7%
Avoid the risk of homes & gardens being flooded with sewerage	5%	4%	6%	11%	7%	3%	3%	7%	6%	2%	1%	10%	0%	2%	4%	5%	8%	6%	1%	3%	14%
Managing the amount of water taken from the environment to supply customers	2%	2%	3%	0%	4%	0%	3%	4%	1%	1%	3%	2%	0%	0%	1%	7%	0%	4%	5%	0%	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	8%	7%	8%	0%	14%	5%	0%	15%	4%	5%	5%	10%	25%	6%	1%	8%	12%	10%	8%	6%	11%
No of respondents	263	130	133	7	107	102	45	83	96	84	127	132	3	47	48	34	46	88	65	132	64

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	12%	9%	15%	0%	16%	9%	12%	19%	10%	8%	17%	7%	24%	6%	17%	36%	11%	3%	9%	14%	9%
Bills show one big change in first year	14%	18%	10%	23%	15%	13%	13%	12%	17%	12%	12%	15%	25%	11%	18%	3%	23%	13%	22%	9%	18%
Bills change steadily every year	74%	73%	75%	77%	69%	78%	75%	69%	73%	80%	71%	78%	51%	83%	65%	61%	67%	83%	69%	77%	73%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	248	119	129	7	103	92	43	76	89	83	123	122	3	47	48	34	44	76	53	129	64

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£14)	Maintain current service (£11)	Maintain current service (£6)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£9)	Maintain current service (£9)	Maintain current service (£7)
	3. Ensuring the safety of tap water	Meet current and future standards at 31 treatment works 825 Km of water mains renovated to complete the renovation previously agreed 59,065 of water company lead pipes replaced to meet new lead standards (£5)	Meet current and future standards at 31 treatment works 825 Km of water mains renovated to complete the renovation previously agreed 59,065 of water company lead pipes replaced to meet new lead standards (£5)	Meet current and future standards at 31 of treatment works 825 Km of water mains renovated to complete the renovation previously agreed 127,590 of water company lead pipes replaced to meet new lead standards (£6)
	4. Managing the appearance, taste and smell of tap water	Fewer customer complaints about the appearance, taste or smell of tap water (£3)	Fewer customer complaints about the appearance, taste or smell of tap water (£3)	Fewer customer complaints about the appearance, taste or smell of tap water (£3)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Fewer customer complaints about the appearance, taste or smell of tap water (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 154 sewage treatment works (£43)	Maintain sewerage pipes and sewage treatment works Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works (£41)	Maintain sewerage pipes and sewage treatment works Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works (£42)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 949 to 100 (£5)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£5)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£17)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	30 Km of rivers can better support fish and rare wildlife 5 wetlands and lakes are restored and protected to support rare wildlife (£1)	6 wetlands and lakes are restored and protected to support rare wildlife (£3)	232 Km of rivers can better support fish and rare wildlife 13 wetlands and lakes are restored and protected to support rare wildlife (£8)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	382 Km of rivers can better support fish 69 Km of rivers and 47 Km2 of waters can support rare wildlife 3 wetlands and 8 lakes are improved and can support rare wildlife (£29)	225 Km of rivers can better support fish 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife 3 wetlands and 8 lakes are improved and can support rare wildlife (£14)	1,088 Km of rivers can better support fish 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife 3 wetlands and 8 lakes are improved and can support rare wildlife (£24)
		Overall cost on average bill taking account of cost savings by 2010 is £100 (excluding inflation) Overall bill by 2010 is £378 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £84 (excluding inflation) Overall bill by 2010 is £363 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £106 (excluding inflation) Overall bill by 2010 is £385 (plus inflation)

1. Key Findings

Cambridge Water is a water supply only company providing water services to 293,000 customers. The proposed increases in the average customer bill for the three plans are:

Company Preferred Plan – £100
Reference Plan A – £76
Reference Plan B - £99

☐ 83% of customers stated that they were satisfied with the current service provided and 51% of customers indicated that it represented good value for money. Just 6% of customers expressed any degree of dissatisfaction whilst 13% and 4% stated that the service was 'fairly poor' value, and 'very' or 'extremely poor' value for money respectively.

☐ 91% or more customers agreed that it was important to maintain services to current standards, particularly 'ensuring the safety of tap water' (99%). Between 69% ('handling customer accounts, queries, complaints and customers with special needs') and 79% ('maintaining sewer and sewage works, ensuring network meets new demands and controlling smells from sewage works') indicated that it would be important for improvements to be introduced to all services before 2010.

☐ In each of the company plans, (each of which proposed a combination of maintained and improved services) 'managing the appearance, taste and smell of tap water' is the service element customers appear most keen to see in the plans (77%-82% would like to see proposed outputs). The second priority across the three plans was to see proposed outputs for 'ensuring the safety of tap water' (75% to 79%), and thirdly, 'ensuring a reliable, continuous water supply' (75% to 78%).

☐ 66% of customers did not wish to see any improvement in addition to those indicated in the proposed plans. 8% of customers however did identify each of 'managing the appearance, taste and smell of tap water', 'avoiding the risk of homes and gardens being flooded with sewage' and 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' as areas for further improvement.

☐ More customers rated Reference Plan A as being good value for money (36%) than the Company Preferred Plan (26%) and Reference Plan B (24%). More customers (41%) regarded Reference Plan B as being poor value for money, than the Company Preferred Plan (38%) and Reference Plan A (33%).

☐ The percentage of customers 'probably willing to pay' for each plan is the same at 53%. However, more customers (14%) were 'definitely willing to pay' for Reference Plan A than the Company Preferred Plan (8%) and Reference Plan B (7%). More customers said that they were 'not willing to pay' for the Company Preferred Plan (36%-24% probably not willing, 12% definitely not willing) and Reference Plan B (35%-21% probably not willing, 14% definitely not willing) than Reference Plan A (29%-18% probably not willing, 11% definitely not willing).

☐ Of those who indicated that they were not willing to pay, over 70% stated that the main reason was 'cost too much for improvement' for each plan. Between 7% and 9% of all Cambridge Water customers indicated that they could not afford to pay the proposed bill increases set out in the three company plans. (7% for Company Preferred Plan and Reference Plan A and 9% for Reference Plan B).

☐ 57% of customers were concerned about possible delays in improvements, and 37% expressed no concern for delay. Those that did express concern were most likely to be concerned about delays to improvements to the 'safety of tap water' (28%), 'maintaining sewers, sewage works ensuring the network can meet new demands and controlling smells from sewage works (21%), and 'maintaining water pipes, treatments works and reservoirs (15%). 0% of customers were concerned about delays in improvements to 'maintaining the pressure of water in taps and the number of unplanned interruptions'.

☐ 82% of Cambridge Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £5/annum), 'managing the appearance, taste and smell of tap water' (at no extra cost), and for the Company Preferred Plan and Reference Plan A, 'avoiding the risk of homes and gardens being flooded with sewage' (£5/annum) and for Reference Plan B 'managing the pressure of water in taps and the number of unplanned interruptions' (free of charge).

2. Introduction

The attitudes and preferences of Cambridge Water customers, reported in section 3, are based on a sample of 201 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty years
	3. Ensuring the safety of tap water	99.84% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 423 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	58 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	98.5% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	1,108 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	10 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	79% of rivers are of good, 13% fair and 8% poor quality. 100% of designated bathing waters meet minimum standards and 84% meet higher standards. 82% of rivers may be at risk from weed growth that can adversely affect wildlife.

- Average bill in this area = £247 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely Dissatisfied	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very dissatisfied	1%	0%	1%	0%	2%	0%	0%	0%	0%	3%	1%	0%	0%	0%	0%	0%	0%	2%	0%	0%	3%
Fairly dissatisfied	5%	3%	6%	12%	4%	5%	2%	2%	7%	6%	4%	5%	0%	13%	6%	7%	4%	0%	4%	3%	8%
Neither satisfied nor dissatisfied	9%	9%	10%	0%	8%	9%	11%	9%	9%	12%	10%	9%	12%	11%	5%	4%	11%	12%	6%	7%	21%
Fairly satisfied	51%	54%	48%	36%	55%	51%	51%	40%	55%	65%	43%	57%	52%	54%	58%	65%	45%	46%	58%	50%	42%
Very satisfied	30%	31%	30%	52%	29%	32%	29%	47%	23%	11%	37%	25%	18%	22%	26%	24%	37%	32%	31%	34%	23%
Extremely satisfied	2%	2%	3%	0%	3%	1%	6%	1%	3%	4%	4%	1%	0%	0%	4%	0%	2%	4%	1%	4%	1%
Dont know/cant say	2%	1%	2%	0%	0%	2%	0%	2%	2%	0%	0%	2%	18%	0%	0%	0%	2%	4%	1%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	1%	2%	1%	0%	3%	1%	0%	3%	1%	0%	3%	0%	0%	0%	3%	0%	2%	1%	0%	0%	6%
Very poor value	3%	0%	6%	0%	4%	2%	3%	0%	3%	9%	4%	2%	0%	9%	3%	5%	0%	2%	0%	4%	6%
Fairly poor value	13%	15%	12%	11%	12%	18%	7%	6%	14%	26%	11%	16%	0%	21%	9%	18%	9%	16%	17%	8%	16%
Neither poor nor good value	26%	28%	24%	37%	21%	34%	17%	31%	27%	15%	21%	31%	0%	24%	9%	10%	28%	42%	26%	26%	24%
Fairly good value	37%	38%	36%	38%	44%	25%	45%	33%	39%	39%	40%	34%	53%	39%	49%	55%	33%	24%	43%	35%	29%
Very good value	13%	11%	14%	14%	6%	15%	27%	18%	9%	9%	17%	10%	0%	3%	25%	5%	19%	5%	13%	13%	10%
Extremely good value	1%	1%	1%	0%	0%	1%	2%	1%	0%	2%	1%	1%	0%	0%	2%	0%	0%	1%	0%	1%	1%
Dont know/cant say	6%	6%	7%	0%	10%	4%	0%	8%	8%	0%	3%	7%	47%	4%	0%	7%	9%	8%	1%	12%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?

(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	97%	98%	96%	77%	99%	99%	94%	100%	95%	96%	96%	99%	82%	92%	96%	100%	98%	97%	98%	95%	99%
Ensuring a reliable & continuous water supply	98%	98%	98%	88%	99%	98%	96%	100%	96%	97%	97%	99%	82%	96%	94%	100%	98%	99%	98%	97%	99%
Ensuring the safety of tap water	99%	99%	99%	88%	100%	100%	96%	100%	97%	100%	99%	99%	100%	96%	98%	100%	100%	99%	99%	99%	99%
Managing the appearance, taste & smell of tap water	97%	98%	97%	88%	99%	98%	92%	97%	97%	97%	96%	98%	100%	96%	98%	100%	98%	95%	96%	97%	99%
Managing the pressure of water in your taps & the number of unplanned interruptions	95%	96%	95%	77%	96%	98%	91%	98%	93%	93%	95%	96%	82%	89%	89%	100%	96%	99%	94%	96%	96%
Handling customers' accounts, queries, complaints & customers with special needs	91%	88%	93%	77%	92%	91%	91%	92%	89%	93%	87%	94%	82%	92%	92%	96%	88%	92%	90%	91%	92%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	97%	98%	97%	88%	97%	100%	94%	98%	96%	98%	98%	98%	82%	96%	96%	100%	96%	99%	99%	96%	96%
Avoid the risk of homes & gardens being flooded with sewerage	96%	98%	95%	77%	96%	100%	92%	97%	95%	97%	96%	97%	82%	92%	98%	100%	95%	97%	97%	96%	96%
Managing the amount of water taken from the environment to supply customers	93%	97%	89%	77%	92%	95%	92%	95%	88%	97%	93%	93%	82%	87%	90%	95%	95%	94%	90%	95%	95%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	93%	96%	90%	88%	92%	95%	90%	96%	88%	95%	95%	92%	82%	91%	90%	91%	96%	92%	89%	96%	95%
No of respondents	200	101	100	9	82	73	31	82	79	39	85	110	6	24	35	24	63	54	81	72	46

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)

(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	73%	72%	74%	51%	73%	74%	73%	65%	77%	82%	65%	80%	64%	73%	73%	81%	66%	78%	77%	86%	45%
Ensuring a reliable & continuous water supply	75%	73%	77%	63%	74%	76%	75%	67%	80%	83%	69%	81%	64%	77%	69%	85%	67%	83%	77%	87%	52%
Ensuring the safety of tap water	76%	72%	79%	63%	74%	79%	73%	67%	80%	84%	69%	81%	82%	77%	73%	85%	69%	80%	78%	88%	52%
Managing the appearance, taste & smell of tap water	77%	73%	80%	75%	71%	83%	73%	68%	82%	84%	68%	82%	100%	81%	73%	85%	70%	81%	78%	87%	58%
Managing the pressure of water in your taps & the number of unplanned interruptions	74%	72%	76%	51%	70%	80%	70%	69%	76%	79%	68%	78%	64%	69%	65%	85%	68%	83%	73%	87%	53%
Handling customers' accounts, queries, complaints & customers with special needs	69%	67%	72%	63%	67%	69%	72%	61%	74%	77%	65%	73%	64%	76%	66%	73%	57%	81%	71%	79%	50%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	79%	77%	82%	63%	77%	84%	75%	72%	84%	84%	73%	84%	82%	79%	73%	85%	73%	87%	82%	89%	58%
Avoid the risk of homes & gardens being flooded with sewerage	79%	76%	82%	51%	77%	84%	75%	72%	82%	84%	72%	84%	82%	75%	73%	85%	71%	89%	82%	89%	55%
Managing the amount of water taken from the environment to supply customers	76%	77%	75%	62%	73%	81%	73%	71%	78%	83%	69%	81%	82%	74%	65%	81%	73%	85%	76%	86%	60%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	75%	76%	74%	74%	72%	79%	70%	71%	78%	80%	69%	80%	82%	77%	65%	75%	73%	84%	74%	85%	62%
No of respondents	200	101	100	9	82	73	31	82	79	39	85	110	6	24	35	24	63	54	81	72	46

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	72%	75%	69%	88%	71%	73%	71%	75%	66%	75%	66%	77%	65%	67%	73%	81%	72%	69%	80%	72%	55%
Ensuring a reliable & continuous water supply	76%	78%	74%	88%	77%	77%	73%	84%	69%	74%	73%	78%	83%	70%	82%	81%	77%	71%	83%	77%	62%
Ensuring the safety of tap water	77%	78%	76%	100%	79%	77%	73%	83%	72%	77%	72%	81%	83%	74%	73%	81%	81%	75%	81%	81%	63%
Managing the appearance, taste & smell of tap water	79%	83%	74%	88%	77%	84%	73%	81%	75%	80%	77%	79%	82%	77%	77%	86%	74%	83%	87%	76%	68%
Managing the pressure of water in your taps & the number of unplanned interruptions	70%	77%	64%	88%	64%	76%	73%	75%	65%	71%	70%	71%	65%	77%	60%	81%	67%	73%	77%	73%	54%
Handling customers' accounts, queries, complaints & customers with special needs	72%	76%	67%	88%	68%	78%	67%	75%	70%	67%	72%	72%	65%	73%	61%	84%	68%	76%	80%	70%	60%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	68%	68%	68%	89%	67%	70%	65%	68%	68%	68%	63%	72%	65%	64%	69%	77%	72%	61%	76%	74%	45%
Avoid the risk of homes & gardens being flooded with sewerage	73%	72%	75%	88%	73%	77%	65%	79%	69%	71%	70%	76%	65%	70%	71%	81%	74%	73%	81%	79%	52%
Managing the amount of water taken from the environment to supply customers	70%	73%	67%	88%	68%	74%	64%	79%	64%	65%	68%	72%	65%	71%	60%	79%	71%	71%	74%	72%	60%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	68%	71%	66%	88%	71%	70%	55%	74%	65%	63%	62%	72%	82%	66%	60%	76%	74%	65%	68%	73%	61%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	74%	75%	73%	88%	72%	76%	71%	82%	67%	72%	71%	77%	65%	63%	76%	81%	77%	70%	83%	72%	60%
Ensuring a reliable & continuous water supply	78%	80%	76%	88%	79%	77%	77%	87%	70%	77%	75%	80%	83%	66%	82%	81%	83%	74%	88%	77%	63%
Ensuring the safety of tap water	79%	80%	77%	88%	80%	80%	73%	85%	73%	77%	76%	81%	83%	66%	76%	81%	88%	75%	86%	78%	67%
Managing the appearance, taste & smell of tap water	82%	83%	80%	100%	82%	84%	73%	85%	78%	80%	79%	83%	82%	77%	77%	86%	83%	83%	90%	77%	73%
Managing the pressure of water in your taps & the number of unplanned interruptions	75%	79%	71%	88%	72%	78%	73%	80%	70%	74%	75%	75%	65%	69%	67%	81%	74%	82%	86%	72%	61%
Handling customers' accounts, queries, complaints & customers with special needs	75%	79%	70%	88%	72%	78%	71%	80%	72%	70%	74%	76%	65%	69%	67%	81%	75%	79%	86%	71%	61%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	70%	71%	69%	89%	70%	72%	63%	72%	70%	68%	64%	75%	65%	64%	68%	77%	77%	64%	79%	75%	47%
Avoid the risk of homes & gardens being flooded with sewerage	76%	73%	78%	88%	76%	78%	67%	84%	70%	71%	74%	77%	65%	66%	71%	81%	81%	75%	84%	79%	57%
Managing the amount of water taken from the environment to supply customers	72%	75%	68%	88%	70%	74%	67%	83%	63%	65%	70%	74%	65%	67%	62%	79%	78%	69%	77%	73%	60%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	69%	71%	67%	88%	69%	69%	66%	74%	67%	64%	64%	72%	82%	71%	59%	81%	75%	62%	73%	77%	49%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	72%	73%	70%	77%	72%	71%	72%	79%	65%	70%	65%	78%	47%	63%	73%	81%	72%	70%	78%	72%	60%
Ensuring a reliable & continuous water supply	75%	78%	73%	77%	77%	74%	75%	82%	68%	75%	71%	79%	65%	66%	82%	81%	76%	72%	80%	77%	62%
Ensuring the safety of tap water	75%	77%	73%	77%	77%	75%	71%	80%	70%	75%	70%	80%	65%	66%	76%	81%	79%	72%	79%	78%	63%
Managing the appearance, taste & smell of tap water	77%	81%	73%	88%	80%	78%	68%	83%	74%	73%	72%	82%	64%	74%	77%	86%	74%	79%	82%	77%	69%
Managing the pressure of water in your taps & the number of unplanned interruptions	71%	78%	64%	77%	70%	73%	68%	77%	67%	67%	68%	75%	47%	66%	67%	81%	67%	77%	79%	72%	56%
Handling customers' accounts, queries, complaints & customers with special needs	70%	77%	62%	77%	70%	72%	65%	77%	66%	62%	67%	73%	47%	66%	67%	81%	67%	71%	77%	71%	54%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	67%	70%	64%	65%	68%	69%	65%	70%	63%	71%	63%	72%	47%	58%	71%	77%	70%	61%	75%	74%	43%
Avoid the risk of homes & gardens being flooded with sewerage	69%	69%	68%	77%	71%	70%	65%	75%	64%	68%	65%	73%	47%	66%	67%	81%	66%	69%	75%	79%	42%
Managing the amount of water taken from the environment to supply customers	68%	72%	64%	77%	67%	71%	64%	78%	59%	65%	64%	72%	47%	61%	62%	79%	69%	69%	70%	74%	55%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	65%	66%	64%	65%	67%	67%	57%	72%	59%	63%	59%	70%	64%	54%	59%	76%	70%	63%	65%	75%	49%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	2%
Ensuring a reliable & continuous water supply	3%
Ensuring the safety of tap water	6%
Managing the appearance, taste & smell of tap water	8%
Managing the pressure of water in your taps & the number of unplanned interruptions	3%
Handling customers' accounts, queries, complaints & customers with special needs	2%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	6%
Avoid the risk of homes & gardens being flooded with sewerage	8%
Managing the amount of water taken from the environment to supply customers	6%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	8%
Upgrade water pipes	2%
(further) reduce sewerage drainage problems	1%
Introduce option of having a water meter	5%
Reduce chemical treatments in water supply	2%
Speed up process of repairs	1%
(further) improve cleanliness of the rivers	1%
maintain the correct service level	1%
Reduce risk of floods	2%
Increase number of water butts available	1%
No, none	66%
No of respondents	201

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	7%	7%	7%	11%	8%	5%	7%	4%	5%	16%	10%	5%	0%	18%	6%	2%	2%	10%	3%	2%	21%
Very poor value	11%	11%	12%	0%	15%	8%	11%	12%	11%	11%	9%	14%	0%	15%	12%	4%	16%	7%	7%	13%	18%
Fairly poor value	20%	21%	19%	14%	18%	23%	23%	16%	22%	26%	21%	20%	17%	21%	24%	21%	14%	24%	24%	19%	16%
Neither poor nor good value	31%	35%	27%	63%	29%	33%	28%	30%	35%	26%	30%	31%	36%	30%	29%	50%	31%	24%	31%	39%	18%
Fairly good value	21%	20%	22%	12%	23%	20%	22%	29%	17%	11%	22%	21%	0%	16%	12%	12%	28%	24%	27%	16%	18%
Very good value	4%	1%	8%	0%	6%	3%	6%	5%	3%	5%	3%	6%	0%	0%	11%	5%	5%	1%	6%	4%	4%
Extremely good value	1%	2%	1%	0%	0%	3%	2%	1%	1%	2%	2%	1%	0%	0%	2%	0%	2%	1%	1%	2%	0%
Dont know/cant say	4%	3%	5%	0%	1%	5%	0%	4%	5%	2%	4%	2%	47%	0%	3%	5%	2%	8%	1%	6%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	7%	7%	8%	0%	10%	5%	9%	5%	5%	16%	10%	5%	0%	17%	6%	2%	4%	10%	3%	5%	19%
Very poor value	10%	11%	9%	14%	9%	10%	9%	7%	13%	9%	8%	11%	0%	7%	20%	0%	9%	9%	11%	9%	9%
Fairly poor value	16%	14%	18%	23%	19%	11%	17%	10%	19%	22%	13%	18%	17%	31%	7%	25%	12%	15%	12%	19%	19%
Neither poor nor good value	27%	29%	25%	39%	24%	32%	24%	31%	27%	21%	27%	28%	18%	19%	21%	32%	32%	28%	25%	38%	13%
Fairly good value	24%	25%	24%	23%	28%	24%	17%	28%	25%	16%	29%	20%	30%	16%	29%	26%	27%	20%	32%	14%	26%
Very good value	11%	9%	13%	0%	8%	12%	20%	15%	6%	11%	8%	14%	0%	9%	15%	9%	14%	7%	16%	7%	8%
Extremely good value	1%	1%	1%	0%	0%	1%	4%	1%	1%	2%	2%	1%	0%	0%	2%	0%	0%	3%	0%	3%	0%
Dont know/cant say	4%	4%	3%	0%	1%	4%	0%	3%	5%	2%	4%	2%	35%	0%	0%	5%	2%	9%	1%	4%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	100	100	9	82	73	31	82	79	39	85	109	6	24	35	24	62	55	80	72	46

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	9%	8%	11%	25%	10%	5%	12%	7%	7%	18%	12%	8%	0%	24%	10%	2%	4%	12%	3%	6%	25%
Very poor value	14%	15%	13%	0%	20%	12%	9%	11%	18%	13%	16%	14%	0%	6%	18%	4%	21%	11%	16%	12%	14%
Fairly poor value	18%	19%	16%	12%	15%	19%	25%	16%	16%	25%	14%	20%	18%	33%	11%	25%	7%	25%	16%	20%	17%
Neither poor nor good value	31%	31%	31%	51%	32%	34%	19%	31%	36%	21%	27%	34%	35%	22%	31%	46%	36%	22%	30%	38%	20%
Fairly good value	16%	17%	15%	12%	18%	16%	15%	20%	13%	15%	19%	14%	0%	15%	16%	12%	19%	14%	24%	10%	11%
Very good value	7%	5%	8%	0%	4%	6%	18%	12%	3%	5%	7%	7%	0%	0%	11%	5%	11%	3%	9%	5%	5%
Extremely good value	1%	1%	1%	0%	0%	1%	2%	0%	1%	2%	1%	1%	0%	0%	0%	0%	0%	3%	0%	2%	0%
Dont know/cant say	4%	4%	5%	0%	1%	7%	0%	4%	6%	2%	5%	2%	47%	0%	3%	5%	2%	10%	1%	6%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	100	100	9	82	73	31	82	79	39	85	109	6	24	35	24	62	55	80	72	46

CAMBRIDGE WATER COMPANY

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	10%	14%	14%	14%	9%	13%	8%	12%	19%	13%	12%	0%	25%	17%	2%	9%	11%	8%	6%	27%
Probably not willing to pay	24%	20%	28%	23%	26%	21%	30%	23%	25%	25%	23%	26%	17%	39%	32%	21%	20%	20%	20%	26%	30%
Probably willing to pay	53%	60%	45%	63%	56%	58%	35%	58%	52%	43%	52%	53%	48%	37%	43%	76%	60%	47%	59%	56%	35%
Definitely willing to pay	8%	6%	9%	0%	4%	7%	22%	11%	5%	7%	8%	7%	0%	0%	8%	0%	12%	10%	9%	10%	1%
Dont know/Cant say	4%	4%	3%	0%	0%	6%	0%	0%	6%	5%	3%	2%	35%	0%	0%	0%	0%	13%	4%	1%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Cost too much for improvement	78%	76%	80%	39%	92%	83%	47%	97%	75%	59%	71%	84%	100%	42%	76%	100%	100%	85%	97%	63%	75%
Cant afford it	18%	17%	20%	61%	8%	10%	49%	3%	18%	41%	25%	14%	0%	58%	21%	0%	0%	4%	3%	32%	20%
Too much & cant afford it	1%	2%	0%	0%	0%	0%	4%	0%	2%	0%	2%	0%	0%	0%	3%	0%	0%	0%	0%	0%	2%
Dont know/Cant say	2%	5%	0%	0%	0%	8%	0%	0%	5%	0%	2%	3%	0%	0%	0%	0%	0%	11%	0%	5%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	72	30	41	3	31	22	13	24	30	18	31	40	1	16	17	6	18	16	23	22	27

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	11%	10%	12%	14%	10%	10%	16%	7%	10%	23%	13%	11%	0%	23%	15%	2%	7%	12%	7%	9%	23%
Probably not willing to pay	18%	17%	19%	23%	24%	11%	18%	15%	24%	11%	16%	19%	17%	33%	22%	16%	16%	10%	13%	19%	24%
Probably willing to pay	53%	56%	50%	63%	49%	60%	48%	58%	48%	52%	53%	53%	48%	39%	52%	58%	57%	52%	55%	55%	43%
Definitely willing to pay	14%	12%	15%	0%	16%	11%	18%	19%	12%	5%	15%	14%	0%	5%	10%	23%	17%	11%	20%	12%	4%
Dont know/Cant say	5%	5%	4%	0%	1%	7%	0%	2%	6%	8%	3%	4%	35%	0%	0%	0%	2%	15%	4%	4%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	100	100	9	82	73	31	82	79	39	85	109	6	24	35	24	62	55	80	72	46

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	5%	3%	7%	0%	11%	0%	0%	6%	7%	0%	0%	9%	0%	7%	0%	0%	14%	0%	6%	5%	4%
Cost too much for improvement	71%	73%	69%	39%	85%	82%	26%	90%	68%	51%	67%	73%	100%	32%	69%	100%	86%	89%	90%	55%	72%
Cant afford it	23%	21%	24%	61%	4%	14%	74%	4%	22%	49%	31%	17%	0%	61%	31%	0%	0%	6%	4%	40%	21%
Dont know/Cant say	1%	2%	0%	0%	0%	4%	0%	0%	2%	0%	2%	0%	0%	0%	0%	0%	0%	5%	0%	0%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	58	27	31	3	28	15	11	18	27	13	25	32	1	14	13	5	15	12	16	20	21

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	14%	14%	13%	25%	13%	9%	21%	8%	15%	22%	15%	14%	0%	33%	14%	2%	10%	14%	12%	9%	25%
Probably not willing to pay	21%	16%	26%	12%	25%	17%	23%	18%	22%	25%	22%	20%	17%	31%	32%	21%	17%	15%	20%	20%	25%
Probably willing to pay	53%	55%	51%	63%	56%	60%	33%	59%	54%	40%	50%	55%	48%	37%	46%	76%	59%	47%	54%	59%	41%
Definitely willing to pay	7%	7%	7%	0%	4%	6%	20%	14%	2%	2%	8%	6%	0%	0%	8%	0%	12%	7%	7%	9%	3%
Dont know/Cant say	5%	7%	3%	0%	1%	7%	4%	1%	6%	11%	5%	4%	35%	0%	0%	0%	2%	17%	7%	3%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	100	100	9	82	73	31	82	79	39	85	109	6	24	35	24	62	55	80	72	46

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Cost too much for improvement	74%	75%	74%	39%	88%	78%	38%	97%	74%	47%	60%	85%	100%	37%	73%	100%	100%	75%	88%	60%	72%
Cant afford it	25%	23%	26%	61%	12%	19%	62%	3%	24%	53%	38%	15%	0%	63%	27%	0%	0%	21%	12%	40%	26%
Dont know/Cant say	1%	2%	0%	0%	0%	3%	0%	0%	2%	0%	2%	0%	0%	0%	0%	0%	0%	4%	0%	0%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	68	29	39	3	31	19	13	21	29	18	30	37	1	16	15	6	17	15	25	20	23

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	18%	18%	18%	12%	15%	16%	34%	11%	19%	28%	19%	17%	12%	31%	23%	16%	14%	14%	11%	21%	25%
Not very concerned	19%	14%	25%	50%	24%	14%	14%	26%	16%	12%	23%	16%	35%	28%	20%	17%	20%	16%	17%	16%	28%
Fairly concerned	40%	44%	37%	28%	39%	49%	31%	43%	39%	37%	37%	43%	35%	29%	38%	58%	47%	31%	45%	47%	23%
Very concerned	17%	19%	16%	11%	19%	16%	18%	19%	19%	12%	18%	18%	0%	12%	16%	9%	18%	24%	22%	13%	17%
Dont know/cant say	5%	6%	5%	0%	4%	5%	4%	1%	6%	10%	4%	5%	18%	0%	4%	0%	2%	14%	4%	3%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	15%	18%	13%	0%	20%	16%	9%	17%	17%	9%	11%	20%	0%	18%	7%	17%	16%	18%	17%	17%	11%
Ensuring a reliable & continuous water supply	7%	6%	9%	13%	6%	11%	4%	6%	7%	10%	3%	11%	18%	5%	2%	14%	9%	8%	5%	14%	2%
Ensuring the safety of tap water	28%	26%	30%	28%	29%	31%	17%	32%	26%	24%	21%	34%	18%	17%	23%	52%	30%	22%	34%	33%	10%
Managing the appearance, taste & smell of tap water	5%	3%	6%	0%	3%	6%	5%	4%	5%	5%	6%	4%	0%	3%	3%	10%	3%	5%	6%	5%	2%
Managing the pressure of water in your taps & the number of unplanned interruptions	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Handling customers' accounts, queries, complaints & customers with special needs	1%	0%	1%	0%	0%	2%	0%	0%	0%	3%	0%	1%	0%	0%	0%	0%	0%	2%	2%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	21%	19%	23%	0%	27%	23%	10%	23%	22%	15%	15%	27%	0%	16%	16%	40%	24%	16%	37%	13%	7%
Avoid the risk of homes & gardens being flooded with sewerage	10%	10%	11%	13%	7%	15%	8%	8%	14%	8%	10%	11%	0%	6%	4%	28%	5%	15%	10%	16%	1%
Managing the amount of water taken from the environment to supply customers	3%	4%	2%	11%	5%	2%	0%	6%	2%	0%	3%	4%	0%	4%	0%	0%	4%	6%	4%	0%	7%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	11%	14%	7%	11%	14%	11%	0%	18%	8%	0%	8%	13%	0%	8%	0%	0%	18%	14%	11%	6%	16%
No of respondents	201	101	100	9	82	74	31	82	80	39	85	110	6	24	35	24	63	55	81	72	46

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	11%	8%	14%	13%	15%	8%	7%	9%	10%	15%	7%	14%	0%	6%	7%	19%	12%	10%	9%	14%	8%
Bills show one big change in first year	7%	9%	5%	0%	8%	5%	14%	6%	6%	13%	10%	6%	0%	11%	14%	14%	2%	5%	12%	4%	4%
Bills change steadily every year	82%	83%	81%	87%	77%	88%	79%	85%	84%	72%	83%	81%	100%	82%	80%	67%	86%	85%	78%	82%	88%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	198	100	98	9	82	71	31	82	79	38	84	109	6	24	35	24	63	52	80	72	45

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£15)	Maintain current service (£8)	Maintain current service (£8)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£8)	Maintain current service (£6)	Maintain current service (£6)
	3. Ensuring the safety of tap water	Meet current and future standards at 2 of treatment works. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. (£5)	Meet current and future standards at 2 treatment works. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. (£5)	Meet current and future standards at 2 treatment works. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. (£5)
	4. Managing the appearance, taste and smell of tap water	Fewer customer complaints about the appearance, taste or smell of tap water (£0)	Fewer customer complaints about the appearance, taste or smell of tap water (£0)	Fewer customer complaints about the appearance, taste or smell of tap water (£0)
	5. Managing the pressure of water in your taps and interruptions to supply	Reduce the number of properties at risk of low water pressure at the tap from 58 to 17 (£Less than £1)	Reduce the number of properties at risk of low water pressure at the tap from 58 to 17 (£0)	Reduce the number of properties at risk of low water pressure at the tap from 58 to 17 (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works.Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works (£43)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works (£41)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works. (£42)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 949 to 100 (£5)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£5)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£17)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	1 wetlands and lake are restored and protected to support rare wildlife (Less than £1)	1 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)	1 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	382 Km of rivers can better support fish. 69 Km of rivers and 47Km2 of coastal waters can support rare wildlife. 3 wetlands and 8 lakes are improved and can support rare wildlife. (£25)	225 Km of rivers can better support fish. 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife. 3 wetlands and 8 lakes are improved and can support rare wildlife (£14)	1,088 Km of rivers can better support fish, 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife, 3 wetlands and 8 lakes are improved and can support rare wildlife. (£24)
		Overall cost, taking account of cost savings, on average bill by 2010 is £100 (excluding inflation). Overall bill by 2010 is £349 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £76 (plus inflation), Overall bill by 2010 is £325 (plus inflation).	Overall cost on average bill by 2010 taking account of cost savings, is £99 (plus inflation). Overall bill by 2010 is £348 (plus inflation).

1. Key Findings

Essex and Suffolk Water is a water supply only company providing water services to a population of 1.73 million customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £105
Reference Plan A - £87
Reference Plan B - £113

☐ Overall 78% of customers stated that they are satisfied with the services provided by Essex and Suffolk Water, with 50% regarding this service as good value for money. 12% of customers indicated that they were dissatisfied with the service and 23% reported that the service was poor value for money.

☐ A high percentage (92% or more) of customers indicated that it was important to maintain all water supply and sewerage service aspects. Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs'(87%) 'managing the amount of water taken from the environment to supply customers' (87%) and 'managing the effect of water company activities on the quality of rivers, wetlands and coastal waters'(87%). When considering improvements 'managing the appearance, taste and smell of tap water' and 'avoiding the risk of homes and gardens being flooded with sewage' were rated as most and equally important (94%).

☐ Across all three plans (each of which proposed a combination of maintained and improved services), customers place 'ensuring the safety of tap water' as the top priority (69%-71%). The next priorities were seen to be 'avoiding the risk of homes and gardens being flooded with sewage' (between 63% and 65% would like to see proposed outputs) 'ensuring a reliable and continuous water supply' (61%-65%) and 'managing the appearance, taste and smell of tap water' (60%-63%).

☐ 52% of customers identified areas they would like to see improvement beyond that mentioned in the proposals. 23% identified 'ensuring the safety of tap water' and 21% 'managing the appearance, taste and smell of tap water'.

☐ The Company Preferred Plan was regarded as best value for money with 45% of customers reporting it as good value for money. Of these, 37% thought it was 'fairly' good value, 7% 'very' good value and 1% 'extremely' good value. By comparison, 41% rated Reference Plan A as good value for money and 31% rated Reference Plan B in this way. More customers (40%) thought that Reference Plan B was poor value for money than the Company Preferred Plan and Reference Plan A (both 30%).

☐ The proportions of customers indicating that they were 'willing to pay' was broadly similar for all three plans. This ranged between 50% for Reference Plan B (47% probably willing, 3% definitely willing), 53% for Company Preferred Plan (46% probably willing, 7% definitely willing) and 56% for Reference Plan A (49% probably willing, 7% definitely willing). The proportion of customers indicating that they were 'not willing to pay' was also similar for all three plans, ranging from 36% for Reference Plan A (19% probably not willing, 17% definitely not willing) 38% for Company Preferred Plan (23% probably not willing, 15% definitely not willing) and 40% for Reference Plan B (18% probably not willing, 22% definitely not willing).

☐ Of those customers indicating they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (58% Company Preferred Plan, 59% Reference Plan A and 58% Reference Plan B). Between 11% and 15% of all Essex and Suffolk customers indicated that they could not afford to pay the proposed bill increases set out in the plans. Respectively, this proportion was 11% for Reference Plan A, 14% for the Company Preferred Plan and and 15% for Reference Plan B.

☐ 38% of customers indicated that they would be concerned if improvements were delayed until after 2010, whilst 56% said they would not be concerned. Concern was greatest for delays to improvement programmes to 'ensuring the safety of tap water' (15%). 0% of customers were concerned about delays in improvements to 'maintaining the pressure of water in taps and the number of unplanned interruptions' or to 'handling customers accounts, queries, complaints and customers with special needs'.

☐ 74% of Essex and Suffolk customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £3/annum), 'avoiding the risk of homes and gardens being flooded with sewage’ (£5-£17) and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£41-£43/annum).

2. Introduction

The attitudes and preferences of Essex and Suffolk Water customers, reported in section 3, are based on a sample of 200 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty five years
	3. Ensuring the safety of tap water	99.93% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 154 customer complaints about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	138 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	95.1% of billing enquiries answered within 5 days and 98.1% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	1,108 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	13 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	79% of rivers are of good, 13% fair and 8% poor quality. 100% of designated bathing waters meet minimum standards and 84 % meet higher standards. 82% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £273 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	2%	1%	3%	0%	0%	2%	5%	0%	4%	1%	1%	2%	0%	4%	0%	4%	0%	1%	1%	2%	4%
Very dissatisfied	3%	4%	3%	0%	1%	5%	5%	1%	8%	0%	1%	5%	0%	2%	0%	8%	0%	4%	0%	6%	0%
Fairly dissatisfied	7%	7%	7%	0%	10%	7%	5%	4%	10%	7%	2%	10%	0%	11%	25%	6%	3%	4%	3%	10%	7%
Neither satisfied nor dissatisfied	7%	7%	7%	0%	7%	10%	1%	3%	8%	10%	12%	5%	0%	0%	27%	0%	9%	7%	8%	6%	13%
Fairly satisfied	42%	46%	39%	71%	43%	44%	36%	59%	29%	41%	38%	45%	0%	29%	29%	43%	54%	46%	42%	42%	26%
Very satisfied	34%	31%	37%	29%	32%	29%	45%	31%	35%	37%	42%	29%	100%	51%	10%	40%	34%	32%	46%	30%	41%
Extremely satisfied	2%	2%	2%	0%	3%	1%	4%	0%	4%	3%	0%	4%	0%	4%	8%	0%	0%	2%	0%	2%	8%
Dont know/cant say	2%	2%	2%	0%	3%	2%	0%	3%	3%	0%	4%	1%	0%	0%	0%	0%	0%	4%	0%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	2%	3%	0%	4%	2%	2%	2%	5%	0%	1%	4%	0%	0%	5%	14%	0%	1%	2%	3%	4%
Very poor value	6%	8%	5%	0%	4%	6%	11%	3%	4%	14%	4%	7%	0%	9%	0%	11%	0%	7%	0%	10%	0%
Fairly poor value	14%	20%	9%	0%	18%	15%	7%	14%	17%	11%	11%	16%	0%	9%	18%	15%	31%	11%	8%	16%	22%
Neither poor nor good value	20%	21%	19%	0%	16%	24%	19%	16%	25%	17%	15%	22%	100%	14%	19%	16%	12%	25%	25%	18%	24%
Fairly good value	34%	30%	37%	63%	36%	31%	33%	44%	28%	29%	43%	29%	0%	38%	34%	33%	23%	35%	32%	34%	25%
Very good value	15%	12%	17%	0%	9%	12%	27%	11%	13%	22%	17%	13%	0%	22%	19%	7%	24%	11%	24%	10%	20%
Extremely good value	1%	2%	1%	0%	1%	1%	1%	1%	2%	0%	2%	1%	0%	2%	0%	0%	0%	2%	3%	0%	2%
Dont know/cant say	7%	7%	8%	37%	11%	8%	0%	9%	6%	7%	7%	8%	0%	6%	5%	4%	11%	9%	6%	8%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	92%	90%	95%	37%	92%	92%	97%	92%	94%	91%	90%	94%	100%	98%	94%	89%	84%	94%	88%	93%	100%
Ensuring a reliable & continuous water supply	95%	94%	97%	71%	93%	96%	99%	93%	96%	97%	94%	96%	100%	98%	100%	96%	89%	95%	87%	98%	100%
Ensuring the safety of tap water	95%	96%	95%	71%	95%	95%	97%	95%	94%	97%	94%	96%	100%	98%	100%	96%	96%	93%	88%	98%	100%
Managing the appearance, taste & smell of tap water	94%	93%	95%	71%	96%	92%	95%	92%	95%	94%	91%	95%	100%	94%	100%	96%	96%	92%	89%	95%	100%
Managing the pressure of water in your taps & the number of unplanned interruptions	94%	95%	92%	71%	96%	91%	95%	92%	93%	96%	92%	94%	100%	94%	95%	93%	100%	92%	92%	92%	100%
Handling customers' accounts, queries, complaints & customers with special needs	87%	90%	85%	37%	92%	89%	83%	90%	91%	80%	84%	90%	100%	77%	84%	96%	89%	89%	85%	85%	100%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	92%	91%	93%	71%	92%	93%	93%	87%	95%	94%	87%	95%	100%	94%	95%	96%	93%	90%	85%	93%	100%
Avoid the risk of homes & gardens being flooded with sewerage	93%	95%	91%	71%	96%	93%	93%	95%	94%	90%	93%	94%	100%	96%	83%	92%	93%	94%	83%	96%	100%
Managing the amount of water taken from the environment to supply customers	87%	86%	88%	37%	91%	89%	84%	87%	90%	83%	82%	91%	100%	78%	86%	92%	89%	88%	83%	87%	96%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	87%	87%	87%	37%	89%	88%	88%	87%	90%	83%	84%	89%	100%	74%	83%	88%	89%	91%	83%	86%	96%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	88%	87%	89%	71%	89%	87%	89%	87%	89%	89%	82%	91%	100%	87%	91%	78%	82%	92%	80%	88%	100%
Ensuring a reliable & continuous water supply	88%	86%	91%	71%	91%	85%	91%	87%	90%	88%	82%	92%	100%	83%	91%	81%	86%	92%	82%	90%	96%
Ensuring the safety of tap water	91%	92%	91%	71%	93%	88%	96%	89%	94%	90%	86%	94%	100%	91%	94%	85%	93%	93%	86%	92%	100%
Managing the appearance, taste & smell of tap water	94%	95%	93%	71%	96%	92%	95%	95%	94%	93%	89%	96%	100%	89%	94%	96%	100%	93%	89%	95%	100%
Managing the pressure of water in your taps & the number of unplanned interruptions	87%	87%	88%	71%	89%	86%	88%	89%	85%	88%	87%	87%	100%	76%	100%	81%	89%	90%	88%	86%	87%
Handling customers' accounts, queries, complaints & customers with special needs	84%	83%	85%	37%	86%	85%	82%	92%	81%	79%	84%	84%	100%	74%	81%	77%	89%	89%	93%	81%	74%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	93%	91%	94%	71%	91%	93%	96%	89%	94%	94%	89%	94%	100%	92%	100%	92%	93%	91%	93%	90%	100%
Avoid the risk of homes & gardens being flooded with sewerage	94%	94%	94%	71%	95%	94%	96%	95%	94%	94%	93%	95%	100%	98%	95%	88%	93%	95%	94%	93%	100%
Managing the amount of water taken from the environment to supply customers	84%	84%	85%	37%	85%	87%	82%	84%	86%	82%	78%	88%	100%	73%	83%	88%	82%	88%	86%	81%	91%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	84%	84%	83%	37%	89%	83%	79%	89%	82%	79%	85%	83%	100%	73%	79%	84%	89%	86%	91%	77%	91%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	58%	59%	57%	29%	54%	66%	51%	68%	61%	41%	59%	58%	0%	47%	36%	58%	70%	62%	57%	54%	76%
Ensuring a reliable & continuous water supply	61%	58%	64%	0%	57%	68%	58%	72%	61%	48%	65%	59%	0%	52%	29%	67%	68%	67%	62%	57%	83%
Ensuring the safety of tap water	71%	70%	72%	29%	76%	71%	68%	79%	72%	60%	73%	71%	0%	67%	47%	88%	85%	68%	68%	66%	97%
Managing the appearance, taste & smell of tap water	62%	63%	60%	29%	65%	62%	60%	72%	65%	45%	63%	62%	0%	50%	29%	78%	77%	63%	64%	53%	94%
Managing the pressure of water in your taps & the number of unplanned interruptions	53%	58%	49%	29%	56%	53%	51%	60%	58%	39%	49%	56%	0%	47%	23%	61%	57%	58%	51%	47%	92%
Handling customers' accounts, queries, complaints & customers with special needs	52%	55%	50%	0%	57%	52%	51%	60%	59%	34%	49%	55%	0%	39%	30%	50%	57%	60%	46%	49%	89%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	57%	59%	56%	0%	58%	63%	50%	62%	64%	44%	58%	58%	0%	41%	54%	69%	68%	58%	53%	56%	76%
Avoid the risk of homes & gardens being flooded with sewerage	63%	65%	61%	0%	74%	58%	60%	70%	65%	52%	59%	66%	0%	60%	46%	75%	71%	61%	47%	63%	95%
Managing the amount of water taken from the environment to supply customers	50%	51%	48%	0%	58%	46%	47%	59%	56%	30%	48%	51%	0%	36%	19%	55%	56%	56%	42%	47%	89%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	54%	55%	52%	0%	60%	55%	47%	67%	57%	34%	54%	54%	0%	41%	31%	50%	66%	59%	56%	47%	82%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	57%	57%	58%	0%	54%	66%	50%	65%	60%	45%	61%	56%	0%	48%	36%	56%	62%	63%	52%	55%	79%
Ensuring a reliable & continuous water supply	61%	56%	66%	29%	64%	62%	57%	67%	66%	49%	64%	60%	0%	56%	41%	77%	55%	64%	58%	57%	89%
Ensuring the safety of tap water	69%	64%	74%	29%	76%	69%	60%	73%	77%	53%	69%	69%	0%	61%	60%	80%	66%	71%	66%	66%	88%
Managing the appearance, taste & smell of tap water	60%	57%	63%	29%	65%	59%	57%	65%	67%	46%	61%	60%	0%	57%	45%	65%	63%	62%	65%	54%	83%
Managing the pressure of water in your taps & the number of unplanned interruptions	53%	56%	50%	0%	53%	56%	53%	62%	59%	35%	51%	55%	0%	41%	22%	59%	49%	62%	46%	49%	91%
Handling customers' accounts, queries, complaints & customers with special needs	50%	51%	50%	29%	57%	46%	49%	56%	60%	30%	47%	53%	0%	34%	25%	55%	49%	59%	41%	48%	83%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	57%	58%	56%	0%	55%	64%	51%	63%	63%	42%	60%	56%	0%	43%	36%	67%	64%	60%	48%	56%	79%
Avoid the risk of homes & gardens being flooded with sewerage	65%	66%	63%	0%	70%	61%	66%	66%	72%	54%	60%	67%	0%	67%	52%	71%	60%	66%	51%	65%	97%
Managing the amount of water taken from the environment to supply customers	51%	50%	52%	0%	61%	48%	45%	61%	58%	31%	51%	52%	0%	37%	28%	47%	56%	59%	48%	47%	85%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	50%	54%	46%	0%	55%	50%	44%	59%	57%	29%	52%	49%	0%	38%	24%	51%	53%	57%	41%	48%	79%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	58%	60%	55%	0%	58%	64%	49%	67%	60%	43%	59%	58%	0%	51%	33%	60%	55%	64%	54%	54%	79%
Ensuring a reliable & continuous water supply	65%	60%	69%	29%	63%	67%	62%	74%	66%	52%	66%	64%	0%	55%	52%	74%	59%	69%	69%	58%	89%
Ensuring the safety of tap water	71%	67%	74%	29%	77%	74%	57%	79%	73%	58%	75%	69%	0%	61%	61%	80%	75%	72%	78%	64%	88%
Managing the appearance, taste & smell of tap water	63%	62%	65%	29%	71%	61%	58%	74%	67%	46%	63%	64%	0%	57%	36%	80%	66%	65%	70%	55%	88%
Managing the pressure of water in your taps & the number of unplanned interruptions	54%	58%	50%	0%	57%	54%	53%	65%	59%	33%	50%	56%	0%	38%	24%	59%	53%	62%	47%	48%	91%
Handling customers' accounts, queries, complaints & customers with special needs	52%	55%	50%	0%	57%	50%	53%	61%	56%	38%	50%	54%	0%	44%	26%	52%	52%	60%	51%	48%	89%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	56%	57%	55%	0%	58%	59%	52%	61%	63%	42%	54%	58%	0%	39%	40%	56%	62%	63%	47%	56%	79%
Avoid the risk of homes & gardens being flooded with sewerage	63%	65%	62%	0%	73%	59%	63%	70%	66%	52%	61%	65%	0%	67%	44%	67%	71%	63%	53%	63%	89%
Managing the amount of water taken from the environment to supply customers	52%	51%	52%	0%	64%	47%	46%	65%	57%	30%	49%	54%	0%	38%	23%	58%	49%	60%	51%	46%	85%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	52%	55%	48%	0%	59%	50%	46%	63%	58%	29%	51%	53%	0%	38%	19%	51%	57%	60%	46%	49%	79%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	4%
Ensuring a reliable & continuous water supply	9%
Ensuring the safety of tap water	23%
Managing the appearance, taste & smell of tap water	21%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%
Handling customers' accounts, queries, complaints & customers with special needs	5%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	9%
Avoid the risk of homes & gardens being flooded with sewerage	12%
Managing the amount of water taken from the environment to supply customers	5%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	7%
Upgrade water pipes	2%
(further) reduce limescale in water	3%
(further) reduce sewerage drainage problems	4%
(further) reduce sewerage treatment works smells	1%
Speed up process of repairs	1%
maintain the correct service level	1%
Increase financial investment	1%
No, none	48%
No of respondents	200

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	7%	2%	0%	2%	5%	7%	5%	4%	4%	0%	7%	0%	0%	0%	6%	4%	6%	4%	6%	0%
Very poor value	11%	13%	8%	0%	13%	10%	9%	10%	12%	9%	10%	11%	0%	13%	19%	11%	7%	9%	1%	16%	13%
Fairly poor value	15%	17%	13%	37%	14%	14%	15%	15%	13%	18%	14%	15%	0%	13%	11%	8%	7%	20%	9%	14%	26%
Neither poor nor good value	22%	23%	21%	0%	28%	16%	28%	23%	19%	26%	17%	25%	0%	28%	25%	17%	30%	19%	28%	20%	25%
Fairly good value	37%	30%	44%	63%	35%	43%	26%	41%	40%	29%	45%	32%	100%	29%	33%	51%	29%	39%	41%	37%	18%
Very good value	7%	7%	7%	0%	8%	7%	8%	4%	10%	7%	9%	6%	0%	9%	9%	8%	12%	5%	13%	4%	9%
Extremely good value	1%	1%	1%	0%	0%	0%	3%	0%	1%	1%	1%	0%	0%	2%	4%	0%	0%	0%	0%	1%	2%
Dont know/cant say	3%	2%	4%	0%	0%	5%	5%	2%	2%	6%	4%	3%	0%	6%	0%	0%	11%	2%	4%	2%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	8%	2%	0%	5%	4%	7%	8%	3%	4%	0%	8%	0%	0%	0%	6%	4%	7%	4%	5%	8%
Very poor value	11%	14%	9%	37%	13%	12%	6%	10%	11%	14%	12%	11%	0%	9%	21%	11%	5%	12%	5%	15%	6%
Fairly poor value	14%	17%	11%	0%	12%	13%	17%	12%	14%	14%	13%	14%	0%	17%	10%	9%	15%	14%	4%	18%	17%
Neither poor nor good value	27%	27%	28%	0%	28%	29%	26%	33%	22%	28%	22%	31%	0%	31%	27%	12%	39%	27%	48%	19%	26%
Fairly good value	33%	27%	39%	34%	35%	34%	27%	33%	36%	29%	38%	29%	100%	28%	38%	47%	30%	30%	25%	36%	27%
Very good value	6%	6%	5%	29%	4%	6%	7%	3%	10%	3%	9%	4%	0%	9%	0%	15%	7%	3%	12%	4%	4%
Extremely good value	2%	1%	2%	0%	1%	0%	5%	1%	1%	2%	2%	1%	0%	0%	4%	0%	0%	3%	1%	1%	4%
Dont know/cant say	3%	1%	4%	0%	1%	2%	5%	0%	3%	5%	4%	2%	0%	6%	0%	0%	0%	4%	1%	3%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	9%	12%	5%	0%	9%	8%	10%	11%	8%	7%	7%	10%	0%	0%	5%	13%	9%	11%	6%	10%	12%
Very poor value	16%	20%	11%	0%	18%	18%	11%	10%	17%	21%	12%	18%	0%	25%	29%	8%	18%	12%	0%	22%	21%
Fairly poor value	15%	16%	15%	37%	13%	13%	20%	19%	16%	10%	18%	14%	0%	16%	0%	12%	10%	20%	10%	18%	15%
Neither poor nor good value	26%	25%	27%	0%	24%	29%	24%	31%	21%	27%	23%	27%	0%	26%	26%	20%	36%	25%	36%	24%	13%
Fairly good value	26%	22%	31%	34%	29%	28%	20%	25%	30%	24%	31%	24%	100%	20%	30%	34%	20%	27%	32%	23%	25%
Very good value	4%	4%	4%	29%	4%	1%	8%	3%	4%	5%	4%	4%	0%	6%	0%	13%	7%	1%	7%	2%	7%
Extremely good value	1%	1%	1%	0%	0%	1%	1%	0%	1%	1%	0%	1%	0%	0%	4%	0%	0%	1%	2%	1%	0%
Dont know/cant say	3%	1%	5%	0%	2%	2%	6%	2%	2%	5%	5%	2%	0%	6%	6%	0%	0%	3%	6%	1%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	98	101	3	66	83	45	66	76	57	68	130	1	30	18	26	26	100	55	114	22

ESSEX & SUFFOLK WATER

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	15%	21%	9%	0%	14%	15%	19%	7%	17%	21%	11%	17%	0%	13%	15%	11%	4%	19%	13%	19%	3%
Probably not willing to pay	23%	24%	22%	37%	23%	21%	27%	23%	20%	27%	19%	25%	0%	32%	31%	18%	33%	18%	12%	29%	22%
Probably willing to pay	46%	41%	52%	29%	52%	50%	31%	57%	51%	27%	49%	44%	100%	26%	35%	55%	49%	52%	54%	41%	46%
Definitely willing to pay	7%	7%	6%	0%	7%	2%	14%	3%	8%	8%	7%	6%	0%	13%	6%	9%	11%	3%	3%	8%	10%
Dont know/Cant say	9%	7%	12%	34%	4%	12%	10%	11%	4%	15%	13%	7%	0%	16%	12%	8%	4%	9%	18%	4%	20%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			0					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban	Urban
Improvements not good enough	3%	4%	2%	0%	4%	0%	6%	0%	5%	2%	3%	3%	0%	0%	0%	0%	6%	0%	3%	0%	5%
Cost too much for improvement	58%	68%	43%	0%	53%	74%	42%	81%	65%	33%	66%	54%	13%	61%	74%	81%	65%	63%	57%	59%	31%
Cant afford it	36%	24%	51%	0%	35%	26%	52%	10%	29%	60%	30%	38%	87%	39%	26%	0%	26%	37%	37%	41%	41%
Dont know/Cant say	4%	4%	4%	100%	7%	0%	0%	9%	0%	4%	0%	5%	0%	0%	0%	19%	3%	0%	3%	0%	23%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	76	44	32	1	24	30	21	20	28	28	21	55	14	8	7	9	37	14	54	5	37

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	17%	21%	13%	37%	16%	17%	17%	9%	17%	26%	10%	21%	0%	17%	15%	17%	4%	21%	13%	22%	3%
Probably not willing to pay	19%	24%	14%	0%	20%	14%	28%	22%	16%	18%	19%	19%	0%	20%	27%	11%	34%	15%	10%	22%	25%
Probably willing to pay	49%	44%	54%	0%	50%	53%	41%	52%	56%	35%	47%	49%	100%	43%	39%	57%	47%	51%	52%	44%	56%
Definitely willing to pay	7%	7%	7%	29%	12%	4%	4%	10%	7%	4%	9%	6%	0%	4%	6%	8%	15%	6%	9%	7%	4%
Dont know/Cant say	8%	4%	12%	34%	2%	12%	9%	6%	4%	17%	14%	5%	0%	16%	12%	8%	0%	7%	16%	5%	11%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			0					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban	Urban
Improvements not good enough	6%	10%	0%	0%	12%	0%	8%	13%	4%	3%	3%	7%	0%	0%	0%	10%	10%	22%	2%	0%	7%
Cost too much for improvement	59%	71%	39%	0%	54%	75%	48%	74%	67%	38%	64%	57%	6%	72%	93%	72%	63%	50%	61%	71%	38%
Cant afford it	31%	15%	57%	0%	27%	25%	44%	4%	29%	54%	33%	30%	94%	28%	7%	0%	24%	28%	34%	29%	45%
Dont know/Cant say	4%	4%	4%	100%	8%	0%	0%	9%	0%	5%	0%	6%	0%	0%	0%	19%	3%	0%	4%	0%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	72	45	27	1	24	26	21	21	25	25	20	52	12	8	7	10	36	12	50	6	37

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	22%	29%	16%	0%	20%	22%	28%	16%	22%	31%	21%	24%	0%	31%	15%	17%	9%	26%	14%	29%	19%
Probably not willing to pay	18%	22%	13%	0%	19%	15%	22%	12%	24%	15%	12%	21%	0%	22%	26%	11%	33%	12%	5%	23%	23%
Probably willing to pay	47%	43%	52%	0%	56%	46%	38%	65%	45%	30%	48%	46%	100%	26%	42%	52%	59%	51%	64%	39%	45%
Definitely willing to pay	3%	3%	4%	29%	3%	3%	3%	0%	6%	3%	5%	2%	0%	5%	4%	11%	0%	1%	2%	4%	2%
Dont know/Cant say	9%	4%	15%	71%	2%	13%	9%	6%	4%	21%	14%	7%	0%	16%	12%	8%	0%	10%	16%	5%	11%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				0			0			0					0		
	Total	M	F	25-44	45-64	65+	AB	C	DE	Yes	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban	Sub	Urban
Improvements not good enough	2%	3%	0%	4%	0%	3%	0%	3%	3%	3%	2%	0%	0%	0%	0%	5%	0%	2%	0%	7%	12%
Cost too much for improvement	58%	66%	46%	58%	76%	34%	84%	68%	28%	66%	55%	7%	62%	100%	83%	65%	56%	56%	83%	53%	43%
Cant afford it	37%	26%	54%	31%	24%	63%	5%	29%	69%	31%	40%	93%	38%	0%	0%	31%	44%	40%	17%	35%	36%
Dont know/Cant say	2%	4%	0%	7%	0%	0%	11%	0%	0%	0%	3%	0%	0%	0%	17%	0%	0%	3%	0%	5%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	78	48	30	24	31	22	17	35	26	22	56	16	7	7	11	36	10	59	7	60	40

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	20%	22%	17%	0%	20%	14%	30%	18%	18%	23%	13%	23%	0%	20%	15%	14%	32%	18%	28%	18%	7%
Not very concerned	36%	35%	37%	0%	37%	42%	27%	32%	40%	37%	35%	36%	100%	45%	38%	31%	15%	40%	42%	36%	35%
Fairly concerned	27%	26%	27%	34%	25%	32%	18%	31%	28%	19%	36%	22%	0%	16%	34%	29%	35%	26%	10%	32%	38%
Very concerned	11%	14%	9%	0%	14%	7%	15%	17%	8%	8%	14%	10%	0%	9%	10%	18%	8%	11%	15%	9%	12%
Dont know/cant say	6%	3%	9%	66%	3%	5%	9%	2%	4%	12%	2%	8%	0%	10%	3%	7%	11%	4%	5%	6%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	2%	4%	1%	0%	1%	2%	3%	1%	4%	0%	4%	1%	0%	2%	0%	0%	7%	2%	2%	3%	2%
Ensuring a reliable & continuous water supply	6%	8%	5%	0%	6%	8%	4%	11%	5%	2%	5%	7%	0%	0%	11%	0%	11%	7%	4%	8%	4%
Ensuring the safety of tap water	15%	16%	14%	0%	13%	21%	10%	17%	17%	11%	21%	12%	0%	9%	20%	19%	19%	14%	12%	14%	26%
Managing the appearance, taste & smell of tap water	3%	1%	6%	0%	3%	4%	3%	1%	2%	7%	6%	2%	0%	4%	13%	0%	0%	3%	8%	2%	0%
Managing the pressure of water in your taps & the number of unplanned interruptions	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	4%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	10%	16%	4%	0%	6%	13%	11%	12%	12%	6%	14%	8%	0%	7%	14%	12%	12%	9%	11%	6%	26%
Avoid the risk of homes & gardens being flooded with sewerage	6%	5%	7%	0%	9%	5%	4%	8%	3%	7%	9%	4%	0%	11%	0%	11%	4%	4%	5%	6%	0%
Managing the amount of water taken from the environment to supply customers	2%	0%	4%	0%	3%	2%	0%	2%	4%	0%	5%	1%	0%	0%	0%	0%	0%	4%	0%	3%	4%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	1%	1%	2%	0%	1%	2%	0%	1%	2%	0%	3%	1%	0%	0%	0%	4%	0%	2%	2%	2%	0%
No of respondents	200	98	102	3	66	83	46	66	77	57	68	130	1	31	18	26	26	100	55	114	22

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	8%	12%	6%	29%	10%	9%	5%	9%	8%	8%	9%	8%	0%	6%	0%	12%	15%	8%	11%	5%	25%
Bills show one big change in first year	17%	14%	20%	0%	12%	25%	11%	12%	18%	21%	23%	14%	0%	24%	27%	19%	8%	15%	27%	15%	0%
Bills change steadily every year	74%	74%	75%	71%	78%	67%	85%	79%	73%	71%	68%	78%	100%	70%	73%	69%	77%	77%	63%	80%	75%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	198	96	102	3	66	81	46	64	77	57	68	128	1	31	18	26	26	98	55	112	22

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£26)	Maintain current service (£27)	Maintain current service (£29)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£6)	Maintain current service (£11)	Maintain current service (£6)
	3. Ensuring the safety of tap water	Meet current and future standards at 1 treatment works, 360 Km of water mains renovated to complete the renovation previously agreed 28,830 of water company lead pipes replaced to meet new lead standards. (£3)	Meet current and future standards at 1 treatment works, 360 Km of water mains renovated to complete the renovation previously agreed, 28,830 of water company lead pipes replaced to meet new lead standards. (£3)	Meet current and future standards at 4 of treatment works, 2,625 Km of water mains renovated to complete the renovation previously agreed, 79,320 of water company lead pipes replaced to meet new lead standards. (£3)
	4. Managing the appearance, taste and smell of tap water	Maintain current service (Less than £1)	Maintain current service (Less than £1)	65% fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 154 sewage treatment works (£43)	Maintain sewerage pipes and sewage treatment works Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works (£41)	Maintain sewerage pipes and sewage treatment works Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works (£42)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 949 to 100 (£5)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£5)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£17)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (Less than £1)	Maintain current service (Less than £1)	Maintain current service (Less that £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	382 Km of rivers can better support fish 69 Km of rivers and 47 Km2 of waters can support rare wildlife 3 wetlands and 8 lakes are improved and can support rare wildlife (£29)	225 Km of rivers can better support fish 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife 3 wetlands and 8 lakes are improved and can support rare wildlife (£14)	1,088 Km of rivers can better support fish 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife 3 wetlands and 8 lakes are improved and can support rare wildlife (£24)
		Overall cost on average bill by 2010, taking account of cost savings, is £110 (plus inflation). Overall bill by 2010 is £383 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £92 (plus inflation). Overall bill by 2010 is £365 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £118 (plus inflation). Overall bill by 2010 is £391 (plus inflation).

1. Key Findings

Tendring Hundred Water Services is a water supply only company providing water services to up to 251,000 customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £77
Reference Plan A - £56
Reference Plan B - £79

☐ 83% of customers stated that they were satisfied with the service provided by Tendring Hundred with just 10% expressing any dissatisfaction. 54% rated the service as good value for money and 23% said that the service was poor value for money.

☐ Customers placed most importance on 'maintaining water pipes, treatment works and reservoirs' (99%). Customers indicated that they consider improvements across all areas of service important (ranging between 85%-91%) with 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' rated highest at 91%.

☐ The one element that customers would most like to see across all three company plans (each of which proposed a combination of maintained and improved services) was 'ensuring the safety of tap water' (69% -77%). Further priorities were 'managing the appearance, taste and smell of tap water' (63%-70%), 'ensuring a reliable and continuous water supply' (62%-70%) and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (59%-71%).

☐ Approximately two thirds of customers (64%) did not wish to see any improvement in addition to those indicated in the proposed plans. 9% of customers wanted to see further improvement to 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works'.

☐ More customers rated Reference Plan A (51%) and the Company Preferred Plan (50%) as being good value for money than Reference Plan B (39%). In line with this, more customers (39%) thought that Reference Plan B was poorer value for money than the Company Preferred Plan (25%) and Reference Plan A (26%).

☐ More customers said that they were ‘willing to pay’ for Reference Plan A (62% - 52% probably willing,10% definitely willing) than the Company Preferred Plan (59% - 47% probably willing, 12% definitely willing) and Reference Plan B (53% - 44% probably willing, 9% definitely willing). Customers were most unwilling to pay for Reference Plan B (40% - 19% probably not willing, 21% definitely not willing). By comparison, 36% were unwilling to pay for the Company Preferred Plan (19% probably not willing, 17% definitely not willing), and 33% for Reference Plan A (18% probably not willing, 15% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (66% Company Preferred Plan, 59% Reference Plan A and 65% Reference Plan B). Between 11% and 12% of all Tendring Hundred Water customers indicated that they could not afford to pay the proposed bill increases set out in the three company plans (12% for Company Preferred Plan and Reference Plan B and 11% for Reference Plan A).

☐ 48% of customers indicated that they would be concerned if improvements were delayed until after 2010, whilst 41% said they were not concerned. Customers would be most concerned if there was delay in improvement programmes to 'ensuring the safety of tap water'. 0% of customers were concerned about delays in improvements to 'managing the amount of water taken from the environment to supply customers'.

☐ 68% of Tendring Hundred customers indicated that their preferred bill option for the period 2005-2010 is for bills to change steadily each year so they do not see big changes from year to year. 21% of customers would prefer to see bills change every year according to how much work water companies have to do.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of less than £1/annum), 'managing the appearance, taste and smell of tap water' (less than £1/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£41-43/annum).

2. Introduction

The attitudes and preferences of Tendring Hundred Water customers, reported in section 3, are based on a sample of 202 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.84% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 210 customer contacts/complaints about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	No properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	1,108 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	2 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	79% of rivers are of good, 13% fair and 8% poor quality. 100% of designated bathing waters meet minimum standards and 84% meet higher standards. 82% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £309 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	3%	0%	0%	0%	0%	0%	0%	0%
Very dissatisfied	4%	5%	3%	17%	0%	11%	0%	7%	4%	1%	5%	2%	0%	0%	0%	0%	7%	6%	4%	4%	5%
Fairly dissatisfied	6%	6%	6%	0%	6%	9%	3%	0%	9%	7%	4%	8%	0%	7%	7%	9%	0%	7%	6%	6%	5%
Neither satisfied nor dissatisfied	7%	12%	3%	0%	7%	12%	3%	9%	7%	6%	7%	8%	0%	3%	10%	9%	16%	4%	10%	4%	4%
Fairly satisfied	39%	31%	46%	50%	53%	25%	37%	42%	36%	38%	28%	50%	51%	41%	36%	45%	40%	37%	44%	31%	36%
Very satisfied	32%	32%	32%	17%	19%	34%	44%	33%	28%	35%	41%	22%	19%	24%	38%	12%	20%	40%	29%	41%	27%
Extremely satisfied	12%	13%	11%	0%	13%	8%	14%	9%	13%	12%	15%	8%	0%	19%	9%	25%	14%	7%	7%	13%	21%
Dont know/cant say	1%	1%	0%	16%	1%	0%	0%	0%	2%	0%	0%	0%	30%	3%	0%	0%	2%	0%	0%	1%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	1%	2%	1%	0%	2%	1%	1%	0%	2%	2%	1%	2%	0%	7%	0%	0%	0%	2%	2%	0%	2%
Very poor value	8%	7%	9%	17%	8%	14%	0%	10%	8%	6%	6%	10%	0%	3%	7%	3%	5%	11%	10%	4%	8%
Fairly poor value	14%	13%	15%	0%	9%	15%	18%	12%	18%	11%	16%	11%	19%	16%	14%	18%	14%	12%	13%	20%	6%
Neither poor nor good value	19%	21%	16%	0%	14%	25%	18%	21%	15%	21%	23%	14%	0%	20%	19%	20%	19%	18%	22%	11%	20%
Fairly good value	33%	34%	32%	50%	48%	24%	27%	40%	30%	31%	27%	40%	27%	28%	35%	41%	38%	30%	34%	38%	25%
Very good value	17%	17%	17%	17%	8%	16%	28%	9%	21%	20%	19%	16%	0%	14%	24%	15%	14%	17%	11%	19%	30%
Extremely good value	4%	3%	5%	0%	6%	4%	3%	4%	1%	8%	4%	4%	0%	9%	2%	4%	7%	3%	3%	4%	7%
Dont know/cant say	4%	3%	5%	16%	5%	0%	4%	3%	6%	2%	4%	1%	54%	3%	0%	0%	2%	7%	5%	4%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	97%	98%	96%	100%	96%	98%	97%	100%	94%	98%	97%	98%	100%	90%	100%	100%	98%	97%	96%	98%	100%
Ensuring a reliable & continuous water supply	97%	98%	97%	100%	98%	97%	97%	100%	95%	98%	97%	98%	100%	93%	98%	100%	100%	97%	96%	99%	100%
Ensuring the safety of tap water	97%	97%	98%	100%	99%	96%	96%	100%	95%	98%	95%	99%	100%	96%	92%	100%	100%	98%	96%	98%	100%
Managing the appearance, taste & smell of tap water	97%	98%	97%	100%	98%	98%	96%	100%	95%	97%	97%	97%	100%	93%	98%	100%	100%	97%	98%	98%	98%
Managing the pressure of water in your taps & the number of unplanned interruptions	96%	96%	97%	100%	96%	96%	99%	100%	94%	96%	96%	98%	76%	93%	92%	100%	98%	97%	97%	96%	98%
Handling customers' accounts, queries, complaints & customers with special needs	94%	92%	96%	100%	96%	89%	96%	96%	92%	95%	92%	96%	100%	88%	93%	97%	93%	96%	93%	98%	93%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	99%	100%	98%	100%	99%	99%	99%	100%	99%	98%	98%	100%	100%	96%	98%	100%	100%	99%	98%	99%	100%
Avoid the risk of homes & gardens being flooded with sewerage	97%	97%	96%	100%	98%	95%	97%	100%	96%	95%	95%	98%	100%	88%	98%	100%	100%	97%	96%	99%	97%
Managing the amount of water taken from the environment to supply customers	95%	94%	96%	100%	96%	94%	94%	100%	91%	96%	97%	93%	100%	81%	95%	100%	98%	97%	96%	95%	95%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	97%	98%	96%	100%	97%	98%	96%	100%	94%	97%	98%	96%	100%	89%	97%	100%	98%	98%	98%	95%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	88%	86%	90%	100%	85%	87%	91%	94%	84%	87%	89%	87%	85%	83%	88%	86%	86%	91%	89%	82%	98%
Ensuring a reliable & continuous water supply	88%	85%	90%	100%	86%	86%	90%	83%	87%	92%	90%	86%	85%	86%	90%	100%	83%	87%	90%	78%	98%
Ensuring the safety of tap water	90%	87%	92%	100%	88%	89%	90%	90%	87%	92%	88%	92%	85%	90%	86%	100%	88%	89%	88%	86%	98%
Managing the appearance, taste & smell of tap water	89%	86%	92%	100%	89%	90%	86%	90%	86%	91%	87%	90%	100%	86%	90%	95%	90%	87%	87%	86%	98%
Managing the pressure of water in your taps & the number of unplanned interruptions	87%	87%	88%	100%	84%	88%	90%	87%	84%	91%	89%	87%	61%	87%	88%	100%	81%	87%	86%	85%	97%
Handling customers' accounts, queries, complaints & customers with special needs	85%	84%	86%	100%	89%	80%	83%	84%	86%	84%	84%	86%	85%	81%	83%	91%	79%	87%	87%	78%	92%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	91%	88%	94%	100%	91%	91%	90%	94%	88%	93%	90%	93%	85%	97%	88%	100%	88%	90%	92%	84%	98%
Avoid the risk of homes & gardens being flooded with sewerage	89%	85%	93%	100%	90%	88%	88%	94%	85%	90%	88%	91%	85%	85%	85%	100%	88%	89%	91%	83%	95%
Managing the amount of water taken from the environment to supply customers	88%	85%	91%	100%	88%	88%	85%	94%	82%	89%	89%	86%	85%	78%	85%	100%	89%	88%	90%	81%	94%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	88%	85%	91%	100%	89%	88%	85%	94%	82%	90%	89%	87%	85%	83%	87%	95%	89%	88%	90%	81%	96%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	61%	61%	62%	100%	65%	54%	59%	57%	64%	61%	64%	57%	85%	68%	63%	40%	73%	59%	54%	55%	88%
Ensuring a reliable & continuous water supply	66%	66%	67%	100%	66%	63%	66%	67%	67%	65%	69%	63%	85%	68%	72%	48%	77%	64%	54%	71%	89%
Ensuring the safety of tap water	73%	71%	74%	100%	75%	73%	66%	76%	74%	68%	73%	71%	100%	71%	76%	65%	90%	67%	62%	77%	91%
Managing the appearance, taste & smell of tap water	66%	67%	65%	100%	65%	68%	59%	65%	66%	66%	66%	64%	100%	73%	63%	40%	79%	66%	57%	60%	97%
Managing the pressure of water in your taps & the number of unplanned interruptions	61%	59%	63%	100%	63%	55%	59%	65%	57%	63%	62%	58%	85%	61%	61%	56%	70%	59%	53%	57%	86%
Handling customers' accounts, queries, complaints & customers with special needs	58%	57%	59%	100%	63%	51%	53%	53%	57%	63%	59%	56%	85%	61%	59%	40%	73%	55%	49%	55%	85%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	61%	62%	60%	100%	61%	66%	50%	57%	61%	65%	60%	62%	85%	71%	64%	51%	71%	57%	48%	61%	94%
Avoid the risk of homes & gardens being flooded with sewerage	61%	63%	60%	100%	67%	59%	52%	57%	63%	63%	64%	58%	85%	61%	66%	56%	78%	55%	52%	60%	88%
Managing the amount of water taken from the environment to supply customers	61%	60%	62%	100%	61%	55%	61%	62%	58%	63%	63%	57%	100%	61%	60%	56%	71%	58%	52%	59%	85%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	59%	59%	58%	100%	65%	49%	56%	53%	59%	63%	62%	53%	85%	65%	64%	40%	67%	56%	48%	57%	86%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	66%	67%	64%	100%	63%	59%	70%	60%	66%	70%	69%	61%	85%	77%	55%	48%	76%	66%	60%	59%	91%
Ensuring a reliable & continuous water supply	70%	71%	70%	100%	70%	64%	73%	62%	73%	73%	74%	65%	85%	80%	67%	52%	84%	68%	64%	68%	91%
Ensuring the safety of tap water	77%	79%	76%	100%	75%	78%	76%	76%	80%	75%	77%	77%	100%	83%	67%	68%	93%	76%	70%	78%	96%
Managing the appearance, taste & smell of tap water	70%	72%	68%	100%	66%	72%	68%	68%	71%	71%	70%	68%	100%	74%	60%	47%	85%	72%	64%	65%	96%
Managing the pressure of water in your taps & the number of unplanned interruptions	65%	64%	65%	100%	64%	58%	67%	62%	62%	70%	67%	60%	85%	74%	55%	48%	73%	66%	59%	57%	91%
Handling customers' accounts, queries, complaints & customers with special needs	63%	64%	62%	100%	63%	58%	63%	57%	63%	69%	64%	61%	85%	74%	53%	43%	73%	65%	59%	53%	89%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	71%	74%	67%	100%	69%	75%	64%	70%	69%	72%	69%	72%	100%	77%	60%	67%	89%	67%	64%	66%	96%
Avoid the risk of homes & gardens being flooded with sewerage	66%	68%	65%	100%	64%	69%	61%	60%	65%	73%	69%	62%	85%	74%	61%	56%	83%	62%	60%	61%	91%
Managing the amount of water taken from the environment to supply customers	64%	66%	62%	100%	63%	59%	66%	57%	65%	70%	66%	61%	85%	77%	55%	40%	73%	66%	59%	54%	91%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	66%	69%	64%	100%	69%	61%	64%	61%	67%	71%	69%	63%	85%	74%	60%	40%	83%	67%	62%	58%	91%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	59%	61%	58%	100%	55%	55%	62%	62%	55%	61%	61%	55%	85%	69%	49%	58%	76%	54%	48%	56%	93%
Ensuring a reliable & continuous water supply	62%	64%	61%	100%	62%	60%	61%	67%	60%	62%	65%	58%	85%	65%	58%	54%	84%	57%	49%	68%	91%
Ensuring the safety of tap water	69%	71%	67%	100%	67%	71%	65%	76%	68%	65%	69%	68%	100%	76%	57%	70%	93%	63%	56%	72%	97%
Managing the appearance, taste & smell of tap water	63%	66%	59%	100%	59%	65%	58%	65%	61%	62%	63%	60%	100%	62%	54%	45%	85%	61%	50%	62%	95%
Managing the pressure of water in your taps & the number of unplanned interruptions	59%	60%	58%	100%	57%	52%	61%	62%	54%	61%	61%	54%	85%	66%	49%	50%	76%	56%	47%	56%	93%
Handling customers' accounts, queries, complaints & customers with special needs	56%	59%	54%	100%	54%	52%	56%	57%	52%	61%	56%	54%	85%	66%	49%	41%	73%	53%	46%	51%	89%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	59%	61%	58%	100%	57%	66%	48%	60%	56%	63%	57%	60%	100%	62%	50%	63%	77%	54%	44%	62%	94%
Avoid the risk of homes & gardens being flooded with sewerage	57%	61%	54%	100%	57%	58%	50%	58%	55%	60%	58%	55%	85%	62%	52%	51%	83%	50%	46%	56%	91%
Managing the amount of water taken from the environment to supply customers	59%	61%	57%	100%	57%	57%	58%	59%	57%	61%	60%	56%	100%	69%	52%	49%	75%	55%	49%	54%	91%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	58%	57%	59%	100%	60%	53%	53%	57%	57%	61%	60%	54%	85%	62%	53%	41%	76%	55%	46%	57%	91%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	2%
Ensuring a reliable & continuous water supply	1%
Ensuring the safety of tap water	7%
Managing the appearance, taste & smell of tap water	7%
Managing the pressure of water in your taps & the number of unplanned interruptions	3%
Handling customers' accounts, queries, complaints & customers with special needs	3%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	9%
Avoid the risk of homes & gardens being flooded with sewerage	3%
Managing the amount of water taken from the environment to supply customers	2%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%
(further) reduce limescale in water	2%
(further) reduce sewerage drainage problems	4%
(further) reduce sewerage treatment works smells	5%
No, none	64%
No of respondents	202

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	4%	6%	0%	7%	8%	3%	4%	8%	3%	4%	7%	0%	3%	9%	4%	0%	7%	9%	2%	2%
Very poor value	6%	6%	5%	0%	5%	8%	5%	3%	6%	9%	5%	6%	0%	7%	2%	3%	5%	8%	9%	3%	2%
Fairly poor value	14%	16%	11%	0%	16%	6%	22%	22%	16%	3%	17%	10%	15%	10%	4%	21%	20%	14%	15%	13%	8%
Neither poor nor good value	20%	19%	22%	17%	23%	24%	16%	24%	19%	19%	24%	18%	0%	23%	24%	9%	33%	17%	25%	20%	9%
Fairly good value	36%	34%	38%	67%	32%	42%	34%	33%	27%	49%	32%	41%	46%	38%	42%	36%	23%	38%	24%	46%	54%
Very good value	11%	11%	11%	0%	15%	8%	7%	7%	15%	10%	9%	14%	0%	7%	16%	20%	17%	6%	10%	12%	12%
Extremely good value	3%	5%	1%	0%	2%	5%	3%	0%	4%	4%	3%	3%	0%	9%	0%	4%	2%	3%	3%	3%	5%
Dont know/cant say	5%	4%	5%	16%	2%	0%	10%	6%	5%	3%	6%	1%	39%	3%	3%	3%	0%	8%	5%	1%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	4%	6%	0%	7%	7%	3%	4%	7%	3%	5%	6%	0%	4%	6%	4%	0%	7%	9%	1%	2%
Very poor value	8%	6%	10%	0%	6%	11%	9%	15%	5%	6%	5%	11%	27%	6%	4%	11%	10%	9%	9%	8%	5%
Fairly poor value	13%	12%	14%	0%	17%	8%	16%	9%	19%	9%	15%	11%	15%	3%	12%	29%	13%	12%	15%	10%	13%
Neither poor nor good value	19%	22%	15%	17%	16%	22%	19%	24%	18%	14%	25%	12%	0%	24%	16%	14%	25%	17%	23%	12%	17%
Fairly good value	38%	40%	36%	67%	41%	39%	32%	38%	31%	47%	35%	43%	19%	47%	37%	26%	37%	40%	28%	51%	46%
Very good value	11%	10%	11%	0%	9%	9%	11%	7%	11%	13%	7%	15%	0%	10%	16%	9%	15%	7%	9%	15%	9%
Extremely good value	2%	3%	1%	0%	2%	3%	1%	0%	3%	2%	2%	2%	0%	4%	2%	4%	0%	2%	2%	1%	4%
Dont know/cant say	4%	2%	6%	16%	2%	0%	9%	3%	5%	4%	5%	1%	39%	3%	5%	3%	0%	6%	6%	1%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	13%	16%	10%	0%	12%	12%	16%	14%	14%	10%	12%	14%	0%	7%	11%	15%	3%	18%	20%	8%	2%
Very poor value	9%	6%	13%	0%	7%	11%	11%	3%	11%	12%	8%	10%	0%	13%	6%	9%	5%	11%	15%	1%	6%
Fairly poor value	17%	17%	18%	0%	20%	9%	26%	29%	19%	5%	22%	10%	42%	7%	12%	12%	25%	20%	17%	20%	16%
Neither poor nor good value	17%	21%	12%	17%	17%	23%	11%	21%	15%	15%	20%	14%	0%	25%	19%	14%	22%	13%	17%	11%	22%
Fairly good value	29%	28%	30%	67%	31%	36%	17%	20%	24%	43%	24%	35%	19%	32%	42%	31%	29%	23%	15%	45%	41%
Very good value	7%	8%	7%	16%	5%	5%	8%	3%	10%	8%	5%	10%	15%	13%	5%	9%	9%	6%	4%	13%	9%
Extremely good value	3%	3%	4%	0%	6%	2%	3%	4%	3%	2%	1%	6%	0%	4%	0%	7%	7%	2%	5%	1%	2%
Dont know/cant say	5%	1%	8%	0%	2%	2%	9%	6%	4%	4%	7%	1%	24%	0%	5%	3%	0%	7%	7%	1%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	17%	19%	15%	17%	19%	19%	14%	16%	18%	16%	13%	22%	0%	23%	13%	13%	9%	20%	21%	13%	11%
Probably not willing to pay	19%	21%	16%	0%	13%	14%	32%	19%	18%	19%	25%	11%	39%	25%	11%	27%	8%	22%	19%	25%	10%
Probably willing to pay	47%	46%	47%	83%	42%	57%	38%	49%	40%	53%	45%	48%	61%	43%	56%	28%	56%	45%	43%	52%	48%
Definitely willing to pay	12%	10%	13%	0%	19%	7%	7%	10%	16%	8%	10%	14%	0%	7%	11%	25%	23%	6%	10%	7%	22%
Dont know/Cant say	6%	4%	8%	0%	6%	3%	10%	6%	7%	5%	8%	4%	0%	3%	9%	7%	3%	7%	7%	3%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Cost too much for improvement	66%	69%	63%	0%	71%	77%	58%	83%	71%	47%	58%	80%	0%	37%	50%	76%	89%	72%	68%	75%	38%
Cant afford it	34%	31%	37%	100%	29%	23%	42%	17%	29%	53%	42%	20%	100%	63%	50%	24%	11%	28%	32%	25%	62%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	71	38	33	1	23	20	26	20	27	23	38	30	2	11	7	7	6	39	39	23	8

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	15%	17%	13%	17%	16%	17%	11%	12%	17%	15%	13%	15%	42%	26%	13%	13%	5%	16%	14%	15%	14%
Probably not willing to pay	18%	18%	18%	0%	12%	16%	27%	17%	14%	23%	21%	14%	24%	25%	11%	25%	3%	22%	14%	28%	13%
Probably willing to pay	52%	52%	52%	83%	54%	56%	43%	61%	48%	49%	51%	54%	34%	39%	52%	43%	72%	50%	52%	48%	58%
Definitely willing to pay	10%	8%	11%	0%	14%	6%	8%	4%	14%	9%	7%	13%	0%	7%	15%	13%	16%	5%	12%	5%	10%
Dont know/Cant say	6%	5%	7%	0%	5%	5%	10%	6%	7%	5%	8%	4%	0%	3%	9%	7%	3%	7%	8%	3%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	2%	0%	4%	0%	0%	5%	0%	0%	5%	0%	0%	4%	0%	0%	0%	0%	0%	3%	4%	0%	0%
Cost too much for improvement	59%	65%	53%	0%	57%	72%	54%	89%	59%	40%	55%	72%	0%	37%	53%	69%	76%	65%	56%	74%	36%
Cant afford it	36%	35%	37%	100%	32%	23%	46%	11%	36%	52%	43%	24%	60%	63%	37%	31%	24%	29%	37%	26%	51%
Dont know/Cant say	3%	0%	7%	0%	11%	0%	0%	0%	0%	8%	2%	0%	40%	0%	9%	0%	0%	3%	3%	0%	13%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	62	33	29	1	18	21	22	16	22	24	34	26	3	11	8	6	3	35	27	25	9

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	21%	25%	18%	17%	15%	25%	27%	18%	21%	25%	22%	21%	27%	41%	16%	13%	0%	28%	28%	14%	15%
Probably not willing to pay	19%	19%	20%	0%	22%	14%	24%	21%	20%	17%	21%	17%	39%	14%	14%	29%	21%	20%	18%	25%	13%
Probably willing to pay	44%	43%	45%	83%	43%	53%	32%	48%	40%	46%	43%	47%	34%	35%	53%	36%	55%	42%	36%	51%	56%
Definitely willing to pay	9%	7%	10%	0%	16%	3%	7%	7%	12%	8%	7%	12%	0%	7%	8%	20%	21%	3%	10%	7%	11%
Dont know/Cant say	6%	5%	6%	0%	4%	5%	10%	6%	6%	5%	8%	4%	0%	3%	9%	3%	3%	7%	7%	3%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	4%	4%	5%	0%	0%	7%	6%	0%	8%	3%	5%	3%	0%	0%	9%	0%	0%	6%	7%	0%	0%
Cost too much for improvement	65%	69%	62%	0%	77%	68%	58%	92%	60%	50%	59%	76%	40%	45%	38%	73%	90%	72%	64%	72%	59%
Cant afford it	30%	27%	34%	100%	23%	25%	37%	8%	31%	47%	35%	21%	60%	55%	53%	27%	10%	22%	28%	28%	41%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	81	42	38	1	24	25	29	22	31	28	44	33	3	13	10	6	7	45	46	24	10

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	15%	18%	13%	17%	15%	16%	15%	10%	15%	19%	15%	14%	42%	23%	16%	13%	10%	15%	20%	11%	9%
Not very concerned	26%	23%	29%	50%	26%	18%	34%	28%	22%	29%	24%	29%	19%	27%	26%	22%	29%	26%	25%	40%	6%
Fairly concerned	32%	34%	30%	0%	32%	41%	26%	32%	33%	31%	33%	32%	0%	34%	34%	51%	18%	32%	33%	27%	37%
Very concerned	16%	14%	18%	17%	19%	15%	14%	16%	19%	13%	18%	14%	0%	10%	17%	3%	24%	17%	14%	14%	24%
Dont know/cant say	11%	11%	11%	16%	8%	10%	10%	14%	11%	7%	10%	10%	39%	7%	7%	11%	20%	10%	8%	8%	23%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	3%	5%	1%	0%	5%	4%	0%	4%	3%	2%	3%	2%	0%	5%	0%	0%	3%	4%	4%	0%	5%
Ensuring a reliable & continuous water supply	7%	6%	8%	0%	8%	9%	4%	9%	8%	4%	4%	10%	0%	0%	9%	0%	13%	7%	8%	6%	5%
Ensuring the safety of tap water	16%	15%	17%	17%	12%	21%	16%	17%	15%	17%	17%	16%	0%	12%	12%	20%	20%	17%	16%	22%	8%
Managing the appearance, taste & smell of tap water	3%	6%	1%	0%	3%	7%	0%	4%	3%	3%	3%	4%	0%	10%	0%	0%	10%	1%	5%	0%	6%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%	4%	1%	0%	4%	3%	0%	0%	4%	2%	0%	5%	0%	0%	2%	5%	0%	3%	3%	2%	2%
Handling customers' accounts, queries, complaints & customers with special needs	1%	3%	0%	0%	0%	2%	3%	3%	1%	0%	2%	1%	0%	0%	0%	0%	0%	3%	3%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	9%	11%	7%	0%	4%	15%	10%	10%	7%	10%	10%	9%	0%	22%	5%	4%	16%	6%	13%	3%	10%
Avoid the risk of homes & gardens being flooded with sewerage	2%	2%	1%	0%	0%	3%	3%	3%	1%	1%	2%	2%	0%	0%	2%	0%	0%	3%	2%	0%	3%
Managing the amount of water taken from the environment to supply customers	0%	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	0%	2%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%	2%	4%	0%	5%	3%	0%	4%	1%	3%	2%	4%	0%	3%	4%	0%	11%	0%	5%	0%	2%
No of respondents	202	99	104	4	69	65	59	57	79	66	106	91	4	23	32	20	34	93	102	60	40

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	21%	19%	24%	50%	20%	27%	17%	17%	16%	31%	17%	27%	0%	33%	21%	20%	18%	20%	14%	34%	21%
Bills show one big change in first year	11%	11%	11%	33%	12%	11%	8%	7%	9%	17%	9%	11%	42%	28%	18%	11%	0%	8%	11%	4%	21%
Bills change steadily every year	68%	70%	65%	17%	68%	62%	75%	76%	75%	52%	73%	62%	58%	39%	61%	69%	82%	71%	75%	61%	59%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	202	98	104	4	69	64	59	57	79	66	106	91	4	23	31	20	34	93	101	60	40

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£5)	Maintain current service (£4)	Maintain current service (£4)
	3. Ensuring the safety of tap water	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. (Less than £1)	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. (Less that £1)	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. (Less that £1)
	4. Managing the appearance, taste and smell of tap water	Fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)	Fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)	Fewer customer complaints about the appearance, taste or smell of tap water (£1)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works. (£43)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 154 sewage treatment works. (£41)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands Reduce odour problems from 154 sewage treatment works. (£42)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 949 to 100 (£5)	Maintain current service (£11)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£17)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (Less than £1)	Maintain current service (Less than £1)	Maintain current service (Less that £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	382 Km of rivers can better support fish, 69 Km of rivers and 47Km2 of coastal waters can support rare wildlife, 3 wetlands and 8 lakes are improved and can support rare wildlife. (£29)	225 Km of rivers can better support fish, 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife, 3 wetlands and 8 lakes are improved and can support rare wildlife. (£14)	1,088 Km of rivers can better support fish, 60 Km of rivers and 47 Km2 of coastal waters can support rare wildlife, 3 wetlands and 8 lakes are improved and can support rare wildlife. (£24)
		Overall cost, taking account of cost savings, on average bill by 2010 is £77 (excluding inflation). Overall bill by 2010 is £391 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £56 (plus inflation). Overall bill by 2010 is £370 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £79 (plus inflation). Overall bill by 2010 is £393 (plus inflation).

1. Key Findings

Northumbria Water is a water and sewerage company serving a population of 2.54 million customers with water and 2.64 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £76
Reference Plan A – £70
Reference Plan B – £80

☐ 79% of customers are satisfied with overall service, whilst 10% expressed dissatisfaction. 62% of customers regard the service as fairly good value or better. 14% regard the service as fairly poor value or worse.

☐ Between 92% and 100% of Northumbrian water customers thought it important for all aspects of services to be maintained at current levels, with the exception of 'handling customer accounts, queries, complaints and customers with special needs' (89%). The importance of introducing improvements by the year 2010 ranged between 86% ('managing the appearance taste and smell of tap water') and 68% ('handling customer accounts, queries, complaints and customers with special needs').

☐ All service elements have similar levels of approval across the three plans (each of which proposed a combination of maintained and improved services). However, more elements of the Company Preferred Plan have greater support than elements within Plans A and B, albeit by only one or two percent in some cases. Across all three plans, between 69% and 77% of customers would like to see proposed outputs for 'ensuring the safety of tap water'. Secondly, with support from 70% to 72% of customers depending on the plan, customers would like to see proposed outputs to 'managing the appearance, taste and smell of tap water'. The third element customers would most like to see (67% to 69% customer support) were those to 'ensuring a reliable and continuous water supply'.

☐ When asked to identify service areas where they would like to see further improvements to those noted in the plans, 68% said 'none'. Of those who did want further improvements, there was most support for 'managing the appearance taste and smell of tap water' (13%).

☐ More customers rated Reference Plan A (55%) and the Company Preferred Plan (51%) as being good value for money than Reference Plan B (40%). In line with this, more customers (27%) thought that Reference Plan B was poorer value for money than the Company Preferred Plan (21%) and Reference Plan A (19%).

☐ The proportion of customers indicating they were 'willing to pay' was similar for the Company Preferred Plan (63% - 52% probably willing, 11% definitely willing) and Reference Plan A (60% - 47% probably willing, 13% definitely willing). Customers were less to willing to pay for Reference Plan B (54%-45% probably willing, 9% definitely willing). Customers were most unwilling to pay for Reference Plan B (29% - 15% probably not willing, 14% definitely not willing). 23% were unwilling to pay for Reference Plan A (11% probably not willing, 12% definitely not willing), and 22% for the Company Preferred Plan (11% probably not willing, 11% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' for the Company Preferred Plan (45%). For Reference Plans A and Plan B the reasons for unwillingness to pay were equally split between improvement costs and affordability. For Reference Plan A, 41% felt the costs were too much for the improvements, and 42% could not afford the proposed changes. For Reference Plan B, 42% felt the costs were too much for the improvements, and 46% could not afford the proposed changes. Between 8% and 13% of all Northumbrian Water customers indicated that they could not afford to pay the bill increases set out in the company plans (8% for the Company Preferred Plan, 10% for Reference Plan A and 13% for Reference Plan B).

☐ 43% of customers would be concerned if some improvements were delayed until after 2010, and equally 42% said that they would not be concerned. More customers (22%) would be concerned by delays to improvements to drinking water quality than any other element. 0% of customers were concerned about delays in improvements to 'managing the amount of water taken from the environment to supply customers'.

☐ 79% of Northumbrian Water customers indicated that their preferred bill option for the period 2005-2010 is for bills to change steadily each year so they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £6-£8/annum), 'managing the appearance, taste and smell of tap water' (£1/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£19-26/annum).

2. Introduction

The attitudes and preferences of Northumbrian Water customers, reported in section 3, are based on a sample of 203 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty five years
	3. Ensuring the safety of tap water	99.93% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 15,490 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	462 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	95.1% of billing enquiries answered within 5 days and 98.1% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	242 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	0 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	91% of rivers are of good, 5% fair and 4% poor quality. 97% of designated bathing waters meet minimum standards and 66% meet higher standards. 40% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £206 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	3%	5%	1%	0%	3%	5%	0%	2%	1%	6%	0%	4%	0%	7%	0%	0%	3%	3%	0%	2%	5%
Very dissatisfied	3%	1%	5%	0%	2%	6%	0%	3%	1%	5%	4%	3%	0%	5%	0%	13%	0%	1%	0%	4%	3%
Fairly dissatisfied	4%	1%	6%	9%	3%	3%	3%	4%	3%	5%	12%	2%	17%	5%	3%	0%	3%	5%	5%	5%	1%
Neither satisfied nor dissatisfied	10%	9%	11%	17%	15%	7%	3%	11%	12%	7%	11%	10%	0%	2%	17%	9%	16%	10%	19%	5%	15%
Fairly satisfied	36%	41%	31%	33%	37%	30%	42%	37%	39%	32%	31%	36%	56%	35%	32%	22%	42%	40%	31%	41%	30%
Very satisfied	32%	32%	32%	25%	26%	38%	41%	31%	29%	37%	32%	33%	14%	33%	44%	37%	29%	27%	25%	33%	33%
Extremely satisfied	11%	9%	12%	16%	12%	10%	9%	13%	12%	9%	7%	11%	14%	14%	0%	20%	5%	14%	20%	10%	11%
Dont know/cant say	1%	1%	1%	0%	1%	1%	0%	0%	2%	0%	4%	1%	0%	0%	3%	0%	3%	0%	0%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	3%	1%	0%	2%	3%	0%	0%	2%	3%	4%	2%	0%	4%	0%	0%	3%	1%	0%	2%	2%
Very poor value	3%	4%	2%	0%	2%	5%	3%	2%	3%	4%	4%	3%	0%	7%	3%	0%	3%	2%	0%	5%	1%
Fairly poor value	9%	7%	10%	17%	8%	12%	0%	5%	7%	13%	0%	9%	17%	6%	10%	13%	3%	11%	5%	6%	13%
Neither poor nor good value	19%	15%	24%	41%	18%	15%	21%	31%	21%	9%	27%	18%	28%	15%	22%	10%	32%	18%	21%	19%	19%
Fairly good value	41%	43%	40%	34%	45%	39%	39%	38%	42%	43%	40%	42%	28%	36%	44%	45%	43%	42%	34%	41%	42%
Very good value	18%	21%	14%	8%	16%	17%	26%	15%	15%	21%	11%	19%	14%	25%	17%	23%	8%	16%	24%	20%	12%
Extremely good value	3%	3%	4%	0%	5%	4%	0%	5%	4%	1%	4%	3%	0%	2%	0%	10%	3%	4%	16%	2%	1%
Dont know/cant say	5%	4%	6%	0%	4%	4%	11%	5%	5%	5%	11%	4%	14%	5%	3%	0%	8%	6%	0%	4%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	97%	97%	96%	100%	96%	99%	93%	98%	96%	96%	93%	97%	100%	95%	94%	100%	95%	99%	100%	98%	94%
Ensuring a reliable & continuous water supply	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Ensuring the safety of tap water	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Managing the appearance, taste & smell of tap water	98%	95%	100%	100%	96%	100%	97%	91%	100%	100%	96%	98%	100%	100%	94%	100%	95%	98%	100%	98%	96%
Managing the pressure of water in your taps & the number of unplanned interruptions	92%	92%	92%	92%	91%	94%	90%	86%	98%	90%	93%	92%	100%	89%	94%	91%	92%	94%	100%	94%	86%
Handling customers' accounts, queries, complaints & customers with special needs	89%	90%	87%	100%	85%	90%	90%	91%	91%	84%	84%	89%	100%	82%	88%	95%	89%	91%	95%	87%	89%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	99%	98%	99%	100%	98%	100%	97%	98%	99%	99%	100%	98%	100%	100%	100%	100%	97%	97%	100%	98%	98%
Avoid the risk of homes & gardens being flooded with sewerage	97%	95%	98%	100%	96%	99%	93%	95%	99%	96%	100%	96%	100%	96%	97%	100%	97%	95%	100%	98%	93%
Managing the amount of water taken from the environment to supply customers	95%	93%	96%	100%	91%	98%	96%	92%	96%	96%	93%	95%	100%	93%	94%	100%	87%	99%	100%	95%	93%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	95%	95%	95%	92%	97%	92%	96%	95%	95%	94%	96%	94%	100%	93%	100%	96%	95%	93%	100%	95%	93%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	76%	77%	75%	83%	78%	74%	73%	81%	72%	77%	89%	73%	100%	86%	93%	81%	73%	62%	9%	79%	90%
Ensuring a reliable & continuous water supply	76%	76%	76%	83%	79%	73%	73%	81%	69%	80%	85%	74%	100%	86%	90%	81%	73%	63%	9%	79%	89%
Ensuring the safety of tap water	77%	74%	80%	83%	80%	73%	76%	79%	70%	83%	81%	76%	100%	91%	86%	81%	65%	69%	19%	83%	84%
Managing the appearance, taste & smell of tap water	86%	84%	89%	100%	87%	88%	78%	86%	85%	88%	85%	86%	100%	98%	90%	95%	82%	76%	55%	85%	91%
Managing the pressure of water in your taps & the number of unplanned interruptions	71%	70%	71%	83%	74%	67%	67%	67%	71%	73%	78%	69%	100%	84%	90%	68%	60%	60%	15%	77%	77%
Handling customers' accounts, queries, complaints & customers with special needs	68%	68%	68%	83%	69%	64%	67%	67%	70%	67%	81%	65%	100%	80%	84%	73%	57%	57%	0%	71%	81%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	79%	79%	80%	83%	80%	77%	81%	80%	74%	85%	89%	77%	100%	93%	97%	81%	73%	65%	9%	83%	92%
Avoid the risk of homes & gardens being flooded with sewerage	77%	76%	79%	83%	78%	78%	70%	77%	75%	80%	89%	75%	100%	91%	90%	85%	73%	62%	9%	83%	88%
Managing the amount of water taken from the environment to supply customers	76%	75%	78%	83%	80%	73%	70%	79%	70%	81%	81%	75%	100%	89%	100%	81%	62%	63%	15%	80%	88%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	76%	77%	74%	75%	78%	73%	74%	77%	71%	80%	81%	74%	100%	86%	97%	81%	71%	60%	19%	77%	89%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	63%	68%	58%	33%	72%	58%	59%	69%	58%	63%	47%	65%	72%	71%	72%	72%	47%	59%	9%	67%	71%
Ensuring a reliable & continuous water supply	67%	70%	64%	33%	71%	68%	66%	73%	66%	64%	47%	70%	72%	77%	67%	76%	53%	65%	27%	70%	74%
Ensuring the safety of tap water	77%	78%	76%	57%	80%	77%	73%	81%	73%	77%	62%	78%	86%	89%	83%	81%	69%	68%	20%	78%	90%
Managing the appearance, taste & smell of tap water	72%	73%	70%	57%	74%	72%	69%	71%	70%	73%	55%	74%	72%	87%	67%	76%	56%	69%	27%	73%	80%
Managing the pressure of water in your taps & the number of unplanned interruptions	61%	66%	56%	33%	66%	60%	59%	66%	57%	61%	47%	63%	72%	63%	61%	76%	51%	60%	22%	59%	74%
Handling customers' accounts, queries, complaints & customers with special needs	59%	62%	57%	41%	65%	57%	55%	66%	58%	55%	43%	61%	72%	63%	64%	72%	47%	57%	22%	60%	68%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	66%	71%	61%	42%	69%	63%	69%	71%	64%	63%	55%	67%	72%	70%	67%	69%	53%	67%	15%	66%	77%
Avoid the risk of homes & gardens being flooded with sewerage	62%	63%	60%	40%	63%	66%	55%	66%	58%	62%	39%	64%	72%	69%	59%	68%	48%	62%	15%	63%	72%
Managing the amount of water taken from the environment to supply customers	59%	66%	53%	41%	66%	56%	55%	70%	53%	58%	43%	61%	72%	65%	63%	71%	42%	58%	22%	58%	70%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	59%	62%	55%	50%	62%	55%	59%	68%	56%	55%	43%	60%	86%	59%	63%	72%	48%	58%	20%	52%	77%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	62%	66%	58%	24%	69%	60%	59%	67%	58%	61%	54%	63%	42%	64%	66%	72%	55%	58%	9%	69%	64%
Ensuring a reliable & continuous water supply	69%	71%	67%	33%	72%	68%	73%	73%	68%	67%	58%	70%	72%	78%	64%	80%	56%	68%	31%	72%	75%
Ensuring the safety of tap water	76%	74%	78%	57%	76%	80%	73%	78%	70%	80%	62%	78%	72%	85%	84%	76%	64%	72%	25%	78%	87%
Managing the appearance, taste & smell of tap water	72%	72%	71%	48%	73%	73%	73%	71%	69%	75%	62%	74%	42%	81%	68%	71%	61%	73%	22%	75%	80%
Managing the pressure of water in your taps & the number of unplanned interruptions	60%	64%	56%	24%	65%	60%	59%	65%	57%	60%	55%	61%	42%	61%	53%	75%	53%	61%	22%	60%	70%
Handling customers' accounts, queries, complaints & customers with special needs	58%	63%	53%	42%	60%	57%	59%	62%	56%	58%	51%	60%	42%	61%	57%	67%	48%	59%	22%	57%	68%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	65%	69%	61%	33%	69%	63%	69%	71%	62%	64%	54%	67%	59%	71%	63%	72%	55%	65%	20%	68%	72%
Avoid the risk of homes & gardens being flooded with sewerage	60%	59%	61%	31%	57%	68%	59%	61%	57%	62%	40%	63%	42%	69%	54%	63%	48%	62%	20%	62%	68%
Managing the amount of water taken from the environment to supply customers	59%	63%	55%	42%	60%	59%	59%	63%	53%	61%	43%	61%	59%	63%	63%	62%	42%	61%	22%	57%	71%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	57%	61%	52%	42%	60%	52%	62%	66%	51%	56%	47%	58%	70%	57%	64%	54%	51%	58%	9%	52%	77%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	62%	66%	58%	33%	68%	62%	59%	66%	62%	59%	47%	64%	56%	67%	76%	72%	50%	56%	10%	68%	67%
Ensuring a reliable & continuous water supply	68%	70%	66%	49%	71%	68%	66%	75%	68%	64%	51%	70%	86%	73%	77%	81%	56%	63%	31%	71%	74%
Ensuring the safety of tap water	75%	73%	77%	66%	72%	81%	73%	78%	70%	78%	59%	77%	86%	89%	81%	76%	61%	69%	26%	77%	86%
Managing the appearance, taste & smell of tap water	70%	71%	68%	48%	68%	73%	73%	68%	71%	70%	51%	73%	56%	83%	67%	76%	56%	66%	22%	73%	78%
Managing the pressure of water in your taps & the number of unplanned interruptions	57%	62%	53%	24%	59%	60%	55%	62%	56%	55%	40%	60%	56%	61%	53%	76%	51%	53%	22%	56%	67%
Handling customers' accounts, queries, complaints & customers with special needs	56%	63%	50%	42%	59%	54%	55%	56%	54%	58%	40%	58%	72%	65%	57%	67%	45%	51%	15%	55%	68%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	62%	66%	59%	42%	63%	62%	66%	66%	62%	59%	48%	65%	56%	64%	67%	64%	50%	64%	16%	63%	73%
Avoid the risk of homes & gardens being flooded with sewerage	61%	60%	62%	41%	58%	68%	59%	60%	61%	61%	33%	65%	56%	71%	57%	68%	48%	60%	31%	61%	68%
Managing the amount of water taken from the environment to supply customers	56%	61%	51%	34%	58%	56%	55%	62%	52%	55%	40%	58%	56%	61%	63%	58%	42%	55%	22%	52%	71%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	53%	59%	48%	33%	58%	48%	59%	59%	48%	55%	39%	54%	86%	59%	57%	49%	48%	52%	14%	48%	73%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	4%
Ensuring a reliable & continuous water supply	2%
Ensuring the safety of tap water	11%
Managing the appearance, taste & smell of tap water	13%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%
Handling customers' accounts, queries, complaints & customers with special needs	3%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	5%
Avoid the risk of homes & gardens being flooded with sewerage	2%
Managing the amount of water taken from the environment to supply customers	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	5%
Upgrade water pipes	1%
Introduce option of having a water meter	1%
Reduce chemical treatments in water supply	1%
Improve communication of water shutdown	1%
Outside tap for the garden	1%
no, none	68%
No of respondents	203

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	7%	3%	8%	2%	10%	0%	2%	7%	5%	12%	4%	0%	5%	0%	4%	8%	6%	0%	5%	6%
Very poor value	7%	6%	7%	0%	9%	8%	0%	8%	4%	8%	4%	7%	0%	11%	3%	4%	5%	7%	5%	7%	6%
Fairly poor value	9%	6%	13%	9%	9%	12%	4%	8%	9%	10%	15%	9%	0%	5%	17%	4%	13%	8%	0%	12%	8%
Neither poor nor good value	22%	29%	15%	17%	24%	12%	33%	16%	28%	19%	23%	21%	28%	27%	13%	40%	19%	17%	33%	20%	21%
Fairly good value	40%	34%	46%	57%	40%	39%	39%	50%	38%	35%	28%	42%	42%	37%	40%	39%	39%	44%	52%	36%	41%
Very good value	10%	14%	7%	0%	10%	11%	14%	11%	6%	15%	7%	11%	14%	7%	24%	5%	8%	10%	9%	13%	8%
Extremely good value	1%	1%	1%	0%	0%	3%	0%	0%	1%	1%	0%	1%	0%	0%	0%	4%	0%	1%	0%	1%	1%
Dont know/cant say	6%	4%	8%	9%	5%	4%	11%	5%	7%	6%	11%	5%	17%	10%	3%	0%	8%	6%	0%	6%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	102	11	84	71	34	55	74	73	24	171	6	48	29	21	34	69	20	107	72

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	7%	3%	8%	3%	9%	0%	2%	6%	6%	8%	5%	0%	7%	0%	4%	8%	4%	0%	5%	6%
Very poor value	6%	5%	8%	0%	6%	10%	3%	7%	4%	8%	0%	7%	0%	11%	3%	4%	3%	7%	11%	7%	4%
Fairly poor value	8%	7%	9%	9%	8%	9%	7%	10%	6%	8%	19%	7%	0%	2%	10%	4%	13%	10%	0%	9%	9%
Neither poor nor good value	19%	18%	19%	17%	24%	16%	10%	17%	22%	17%	28%	17%	28%	16%	20%	27%	18%	18%	19%	18%	20%
Fairly good value	41%	43%	39%	49%	42%	34%	52%	37%	46%	40%	20%	44%	42%	48%	40%	47%	35%	38%	46%	38%	43%
Very good value	12%	12%	12%	8%	12%	13%	10%	18%	8%	11%	15%	11%	14%	6%	20%	10%	15%	11%	24%	13%	7%
Extremely good value	2%	2%	2%	0%	1%	4%	0%	2%	3%	1%	0%	2%	0%	0%	3%	4%	0%	3%	0%	3%	1%
Dont know/cant say	7%	6%	8%	9%	4%	5%	17%	8%	5%	8%	11%	6%	17%	10%	3%	0%	8%	8%	0%	6%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	6%	8%	5%	8%	4%	10%	3%	2%	9%	7%	8%	7%	0%	9%	0%	4%	8%	7%	6%	7%	6%
Very poor value	6%	4%	9%	0%	7%	10%	0%	7%	3%	10%	0%	8%	0%	11%	7%	4%	5%	4%	5%	7%	6%
Fairly poor value	15%	12%	18%	18%	17%	12%	14%	16%	16%	13%	27%	14%	0%	10%	17%	14%	21%	14%	14%	18%	11%
Neither poor nor good value	23%	27%	19%	31%	21%	27%	18%	22%	27%	20%	23%	24%	14%	23%	15%	30%	21%	26%	42%	25%	15%
Fairly good value	31%	30%	33%	35%	34%	24%	37%	36%	29%	30%	21%	31%	86%	29%	45%	38%	20%	31%	23%	26%	42%
Very good value	8%	10%	7%	8%	8%	10%	4%	6%	8%	10%	7%	9%	0%	6%	14%	9%	10%	6%	9%	10%	5%
Extremely good value	1%	1%	0%	0%	0%	1%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	1%	0%	1%	0%
Dont know/cant say	9%	9%	9%	0%	8%	5%	24%	11%	8%	8%	15%	9%	0%	12%	3%	0%	14%	10%	0%	7%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	11	83	71	36	55	73	74	24	171	6	49	29	20	34	69	20	106	74

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	11%	10%	12%	8%	8%	17%	10%	7%	10%	16%	20%	11%	0%	22%	3%	0%	13%	9%	0%	18%	5%
Probably not willing to pay	11%	14%	8%	8%	11%	16%	4%	11%	9%	13%	7%	11%	14%	7%	10%	17%	16%	10%	5%	10%	14%
Probably willing to pay	52%	47%	57%	66%	66%	40%	41%	56%	62%	39%	44%	53%	70%	43%	67%	74%	39%	53%	71%	47%	53%
Definitely willing to pay	11%	15%	7%	0%	6%	15%	17%	17%	7%	10%	15%	11%	0%	7%	14%	4%	19%	10%	19%	12%	7%
Dont know/Cant say	15%	14%	16%	18%	9%	13%	28%	8%	13%	21%	14%	15%	17%	21%	6%	5%	13%	18%	5%	12%	21%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	11%	8%	14%	0%	25%	4%	0%	0%	6%	19%	0%	13%	0%	20%	27%	0%	0%	7%	0%	10%	14%
Cost too much for improvement	45%	47%	44%	49%	35%	56%	26%	54%	49%	39%	87%	37%	100%	42%	27%	0%	74%	45%	100%	43%	47%
Cant afford it	36%	37%	34%	51%	23%	35%	74%	21%	44%	38%	0%	43%	0%	37%	47%	48%	9%	48%	0%	38%	33%
Dont know/Cant say	8%	8%	8%	0%	17%	4%	0%	26%	0%	5%	13%	7%	0%	0%	0%	52%	17%	0%	0%	9%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	45	24	22	2	16	23	5	10	14	22	7	38	1	14	4	4	10	13	1	31	14

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	11%	14%	8%	11%	14%	14%	5%	13%	17%	11%	13%	0%	24%	3%	4%	11%	11%	11%	17%	6%
Probably not willing to pay	11%	14%	8%	8%	10%	16%	4%	12%	9%	12%	15%	10%	14%	7%	10%	13%	19%	8%	0%	11%	13%
Probably willing to pay	47%	42%	53%	57%	62%	36%	34%	51%	56%	36%	36%	49%	56%	36%	56%	69%	44%	47%	65%	41%	51%
Definitely willing to pay	13%	18%	8%	0%	10%	18%	17%	24%	7%	12%	11%	14%	14%	9%	18%	9%	17%	14%	19%	16%	8%
Dont know/Cant say	16%	16%	17%	28%	7%	17%	32%	8%	16%	23%	27%	15%	17%	24%	13%	5%	10%	19%	5%	14%	23%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	11%	8%	15%	0%	11%	10%	20%	0%	20%	10%	16%	11%	0%	7%	27%	0%	10%	16%	55%	7%	14%
Cost too much for improvement	41%	40%	43%	49%	42%	46%	20%	59%	36%	37%	57%	37%	100%	37%	27%	28%	64%	37%	45%	39%	47%
Cant afford it	42%	45%	38%	51%	32%	44%	60%	23%	38%	53%	0%	50%	0%	56%	47%	48%	9%	47%	0%	49%	33%
Dont know/Cant say	6%	7%	4%	0%	15%	0%	0%	19%	6%	0%	27%	2%	0%	0%	0%	24%	17%	0%	0%	6%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	47	24	22	2	18	21	6	9	16	22	6	39	1	15	4	4	10	14	2	31	14

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	14%	13%	14%	8%	15%	15%	10%	7%	14%	19%	15%	14%	0%	22%	13%	4%	16%	9%	0%	19%	10%
Probably not willing to pay	15%	14%	16%	17%	16%	17%	11%	18%	13%	15%	15%	15%	14%	12%	10%	19%	21%	16%	20%	13%	17%
Probably willing to pay	45%	41%	48%	57%	54%	36%	37%	53%	53%	31%	31%	46%	56%	31%	49%	67%	42%	47%	75%	38%	45%
Definitely willing to pay	9%	15%	3%	9%	3%	15%	11%	12%	4%	12%	12%	9%	14%	7%	18%	5%	5%	10%	4%	13%	5%
Dont know/Cant say	18%	17%	18%	9%	12%	17%	32%	11%	16%	24%	27%	16%	17%	28%	10%	5%	16%	18%	0%	18%	23%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	11	83	71	36	55	73	74	24	171	6	49	29	20	34	69	20	106	74

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	5%	11%	0%	0%	7%	5%	0%	7%	5%	4%	12%	4%	0%	0%	15%	0%	7%	6%	0%	3%	10%
Cost too much for improvement	42%	36%	47%	31%	49%	45%	17%	47%	51%	33%	64%	38%	100%	29%	45%	44%	70%	33%	33%	43%	41%
Cant afford it	46%	45%	48%	69%	33%	46%	83%	25%	39%	63%	0%	54%	0%	71%	39%	38%	7%	55%	67%	46%	43%
Dont know/Cant say	6%	7%	6%	0%	11%	4%	0%	22%	5%	0%	24%	4%	0%	0%	0%	19%	15%	6%	0%	8%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	55	24	31	3	23	21	8	12	19	25	7	47	1	17	7	5	12	15	3	34	18

NORTHUMBRIAN WATER

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	18%	21%	15%	16%	20%	13%	24%	14%	18%	20%	11%	19%	14%	32%	0%	21%	21%	13%	28%	17%	17%
Not very concerned	24%	24%	24%	26%	26%	24%	20%	36%	21%	18%	12%	25%	28%	10%	24%	29%	16%	36%	42%	20%	24%
Fairly concerned	28%	27%	29%	0%	32%	34%	18%	28%	21%	36%	40%	26%	42%	22%	44%	18%	36%	25%	18%	35%	22%
Very concerned	15%	14%	16%	33%	11%	20%	7%	14%	17%	13%	12%	15%	17%	16%	13%	23%	20%	10%	0%	15%	19%
Dont know/cant say	16%	15%	16%	26%	11%	9%	32%	9%	24%	12%	25%	15%	0%	20%	19%	10%	8%	16%	11%	13%	19%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	7%	8%	6%	0%	8%	10%	0%	12%	7%	4%	14%	5%	28%	0%	10%	14%	15%	5%	0%	10%	5%
Ensuring a reliable & continuous water supply	7%	7%	7%	0%	8%	11%	0%	12%	6%	4%	11%	6%	28%	4%	7%	18%	8%	5%	0%	8%	8%
Ensuring the safety of tap water	22%	19%	25%	24%	25%	23%	14%	21%	22%	22%	30%	20%	42%	10%	37%	23%	32%	19%	0%	26%	23%
Managing the appearance, taste & smell of tap water	3%	3%	4%	0%	4%	3%	4%	2%	2%	6%	0%	4%	0%	2%	6%	0%	3%	4%	0%	4%	4%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	2%	0%	0%	2%	0%	0%	2%	0%	1%	0%	1%	0%	0%	0%	0%	3%	1%	0%	1%	1%
Handling customers' accounts, queries, complaints & customers with special needs	1%	1%	0%	0%	1%	0%	0%	0%	0%	1%	0%	1%	0%	2%	0%	0%	0%	0%	0%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	7%	2%	12%	16%	8%	7%	3%	7%	9%	6%	16%	6%	0%	2%	14%	18%	14%	2%	0%	6%	11%
Avoid the risk of homes & gardens being flooded with sewerage	2%	2%	2%	0%	3%	0%	4%	0%	3%	3%	4%	2%	0%	0%	3%	5%	0%	3%	0%	3%	2%
Managing the amount of water taken from the environment to supply customers	0%	1%	0%	0%	1%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	2%	1%	3%	0%	1%	1%	7%	4%	2%	1%	0%	3%	0%	0%	4%	5%	4%	2%	0%	1%	5%
No of respondents	203	99	104	11	84	71	36	55	74	74	24	172	6	49	29	21	34	69	20	107	74

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	12%	14%	9%	9%	14%	13%	3%	15%	11%	10%	17%	11%	14%	11%	9%	17%	8%	13%	9%	9%	16%
Bills show one big change in first year	10%	12%	7%	18%	10%	7%	10%	9%	8%	11%	0%	10%	30%	11%	13%	14%	3%	9%	0%	10%	12%
Bills change steadily every year	79%	74%	83%	72%	76%	80%	86%	76%	81%	79%	83%	79%	55%	78%	78%	69%	89%	78%	91%	81%	72%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	201	97	104	11	83	70	36	54	73	74	23	171	6	49	29	21	32	69	20	107	72

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£22)	Maintain current service (£19)	Maintain current service (£21)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£1)	Maintain current service (Less than £1)	Maintain current service (Less than £1)
	3. Ensuring the safety of tap water	Meet current and future standards at 3 of treatment works, 2,265 Km of water mains renovated to complete the renovation previously agreed, 50,490 of water company lead pipes replaced to meet new lead standards. (£6)	Meet current and future standards at 3 treatment works, 2,265 Km of water mains renovated to complete the renovation previously agreed, 50,490 of water company lead pipes replaced to meet new lead standards. (£6)	Meet current and future standards at 3 of treatment works,2,265 Km of water mains renovated to complete the renovation previously agreed, 50,490 of water company lead pipes replaced to meet new lead standards. (£8)
	4. Managing the appearance, taste and smell of tap water	67% fewer customer complaints about the appearance, taste or smell of tap water (£1)	67% fewer customer complaints about the appearance, taste or smell of tap water (£1)	67% fewer customer complaints about the appearance, taste or smell of tap water (£1)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain current service (£26)	Maintain current service (£22)	Maintain current service (£19)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 245 to 51 (£7)	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 245 to 51 (£5)	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 245 to 51 (£4)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£1)	Maintain current service (Less than £1)	Maintain current service (Less than £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	68 Km of rivers can better support fish, 1 designated bathing water improved. (£13)	68 Km of rivers can better support fish, 1 designated bathing water is improved. (£16)	90 Km of rivers can better support fish, 1 designated bathing water is improved. (£27)
		Overall cost on average bill by 2010, taking account of cost savings, is £76 (plus inflation). Overall bill by 2010 is £279 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £70 (plus inflation). Overall bill by 2010 is £273 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £80 (plus inflation). Overall bill by 2010 is £283 (plus inflation).

1. Key Findings

Southern Water is a water and sewerage company serving a population of 2.2 million customers for water and 4.4 million for wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £87
Reference Plan A - £102
Reference Plan B - £149

☐ 82% of customers said that they are satisfied with the services provided by Southern Water. Only 7% reported dissatisfaction. 60% of customers regard the service as fairly good value for money or better; 20% regard the service as fairly poor value for money or worse.

☐ Between 83% and 98% of Southern water customers thought it important for all aspects of services to be maintained at current levels, particularly, (98%) 'ensuring the safety of tap water'. The lowest maintenance priority (83%) was for 'handling customer accounts, queries, complaints and customers with special needs'. The importance of introducing improvements by the year 2010 ranged between 76% ('managing appearance taste and smell of tap water') and 49% ('handling customer accounts, queries, complaints and customers with special needs'). Customers in rural locations have less interest in general improvements but do feel it is important to maintain the current level of service.

☐ Customer approval is greatest for the Company Preferred Plan, followed by Reference Plan A and then Reference Plan B (where each plan proposed a combination of maintained and improved services). For each service element the Preferred Plan is around 5 percentage points ahead of Plan A. Proposals to 'ensure the safety of tap water' have the highest level of approval within all three company plans, with between 68% and 80% of customer support. The next priorities in the plans are proposed outputs for 'ensuring a reliable and continuous water supply'(49% -66% support) and 'managing the appearance, taste and smell of tap water' (51% to 64% customer support).

☐ When asked to identify service areas where they would like to see further improvements to those noted in the plans, 74% of Southern customers said 'none'. 7% indicated that they would like to see further improvement in 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters'.

☐ In general, none of the plans were considered as particularly good value for money, but of the three, the Company Preferred Plan was considered best value for money. One third of customers (34%) considered this plan good value for money, and 38% regarded it as poor value for money. 50% of customers rated Reference Plan A is being poor value, and 64% Reference Plan B. 22% of customers thought Reference Plan A was good value, and 12% Reference Plan B.

☐ 50% of customers indicated that they were willing to pay for the Company Preferred Plan (40% probably willing, 10% definitely willing), against 44% saying they were not willing to pay (28% probably not willing, 16% definitely not willing). Fewer customers (38%) reported that they were willing to pay for Reference Plan A (31% probably willing, 7% definitely willing) and fewer again (27%) were willing to pay for Reference Plan B (22% probably willing, 5% definitely willing). 65% (26% probably not willing, 39% definitely not willing) of customers stated they were not willing to pay for Reference Plan B and 55% (34% probably not willing, 21% definitely not willing) stated the same for Reference Plan A.

☐ Of those customers who indicated that they were not willing to pay, most said that this was because 'the cost was too much for the improvements' (62% Company Preferred Plan, 70% Reference Plan A and 65% Reference Plan B). Between 14% and 15% of all Southern Water customers indicated that they could not afford the proposed bill increases set out in the Company Preferred Plan and Reference Plan A, and this increased to 21% when considering Reference Plan B.

☐ 56% of customers would be fairly or very concerned about delays in implementing the plans, and 39% indicated that they would not be concerned. Delays to 'ensuring the safety of tap water' would cause greatest concern (31%).

☐ 83% of Southern Water customers indicated that their preferred bill option for the period 2005 to 2010 is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £4-£6/annum), 'managing the appearance, taste and smell of tap water' (at no extra cost), and in 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£3/annum).

2. Introduction

The attitudes and preferences of Southern Water customers, reported in section 3, are based on a sample of 202 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.89% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 4,526 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	523 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	98.3% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	507 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	8 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	83% of rivers are of good, 10% fair and 7% poor quality, 99% of designated bathing waters meet minimum standards and 76% meet higher standards.58% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £250 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	0	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	2%	0%	0%	1%	0%	2%	0%	2%	0%	0%	1%	0%	0%	3%	0%	2%	0%	0%	1%	0%
Very dissatisfied	2%	3%	1%	29%	3%	1%	1%	3%	3%	0%	7%	1%	0%	0%	6%	3%	1%	2%	0%	1%	4%
Fairly dissatisfied	4%	4%	4%	0%	4%	4%	6%	2%	6%	3%	2%	5%	0%	8%	6%	0%	3%	4%	6%	5%	3%
Neither satisfied nor dissatisfied	7%	8%	6%	0%	4%	5%	14%	7%	5%	9%	6%	7%	0%	5%	4%	4%	6%	9%	12%	6%	8%
Fairly satisfied	37%	35%	39%	44%	34%	46%	31%	20%	42%	52%	39%	37%	0%	43%	51%	52%	23%	36%	14%	38%	37%
Very satisfied	39%	37%	41%	27%	41%	38%	37%	48%	36%	31%	41%	38%	0%	44%	26%	36%	48%	37%	68%	33%	44%
Extremely satisfied	6%	6%	6%	0%	10%	2%	3%	8%	5%	5%	3%	7%	0%	0%	2%	4%	10%	6%	0%	9%	3%
Dont know/cant say	4%	5%	3%	0%	4%	3%	7%	12%	1%	0%	3%	4%	0%	0%	2%	0%	7%	5%	0%	7%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	3%	1%	0%	2%	1%	4%	5%	2%	0%	2%	2%	0%	3%	5%	3%	0%	2%	0%	1%	4%
Very poor value	5%	9%	2%	0%	5%	8%	3%	3%	6%	7%	3%	6%	0%	4%	9%	0%	0%	9%	7%	5%	6%
Fairly poor value	13%	9%	16%	0%	10%	6%	25%	7%	12%	21%	1%	15%	0%	13%	34%	4%	3%	13%	26%	13%	10%
Neither poor nor good value	16%	17%	15%	44%	14%	16%	18%	12%	15%	22%	23%	14%	0%	32%	7%	24%	10%	16%	29%	15%	15%
Fairly good value	40%	39%	40%	27%	40%	47%	31%	44%	40%	33%	42%	39%	0%	33%	26%	48%	55%	35%	31%	44%	35%
Very good value	17%	17%	18%	29%	19%	18%	14%	20%	18%	14%	15%	18%	0%	15%	16%	14%	25%	15%	8%	19%	17%
Extremely good value	3%	1%	5%	0%	3%	3%	2%	5%	2%	0%	7%	1%	0%	0%	2%	0%	0%	5%	0%	0%	6%
Dont know/cant say	4%	5%	3%	0%	7%	1%	3%	5%	5%	3%	6%	4%	0%	0%	0%	7%	7%	4%	0%	2%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	95%	94%	95%	100%	92%	96%	97%	98%	95%	91%	97%	94%	0%	85%	94%	100%	95%	95%	100%	91%	99%
Ensuring a reliable & continuous water supply	97%	95%	99%	100%	97%	97%	99%	100%	97%	95%	95%	98%	0%	90%	100%	100%	97%	98%	100%	96%	99%
Ensuring the safety of tap water	98%	97%	99%	100%	97%	99%	98%	100%	97%	97%	99%	98%	0%	97%	100%	97%	99%	98%	100%	97%	100%
Managing the appearance, taste & smell of tap water	93%	91%	95%	100%	94%	89%	95%	93%	91%	95%	86%	95%	0%	93%	97%	91%	89%	94%	100%	90%	96%
Managing the pressure of water in your taps & the number of unplanned interruptions	92%	93%	91%	100%	91%	92%	95%	95%	91%	91%	91%	93%	0%	93%	95%	97%	87%	93%	100%	89%	97%
Handling customers' accounts, queries, complaints & customers with special needs	83%	82%	84%	71%	82%	80%	89%	79%	90%	78%	68%	87%	0%	79%	77%	78%	77%	90%	100%	83%	82%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	96%	94%	98%	71%	97%	94%	98%	95%	97%	97%	93%	97%	0%	100%	97%	100%	91%	97%	100%	95%	98%
Avoid the risk of homes & gardens being flooded with sewerage	94%	92%	96%	71%	95%	94%	96%	95%	95%	93%	85%	96%	0%	89%	91%	91%	95%	97%	100%	95%	93%
Managing the amount of water taken from the environment to supply customers	93%	92%	94%	71%	92%	95%	93%	98%	93%	87%	86%	95%	0%	77%	92%	97%	95%	95%	100%	91%	95%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	96%	95%	96%	100%	94%	98%	94%	100%	93%	93%	93%	96%	0%	88%	93%	94%	99%	97%	100%	95%	96%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	64%	63%	65%	100%	63%	64%	64%	67%	61%	64%	53%	67%	0%	38%	65%	51%	75%	66%	6%	66%	69%
Ensuring a reliable & continuous water supply	64%	63%	65%	100%	60%	62%	71%	68%	59%	66%	54%	66%	0%	38%	77%	59%	78%	59%	0%	69%	64%
Ensuring the safety of tap water	67%	69%	65%	100%	65%	70%	66%	72%	62%	69%	60%	69%	0%	56%	72%	66%	82%	61%	6%	72%	67%
Managing the appearance, taste & smell of tap water	76%	71%	80%	100%	75%	78%	73%	80%	70%	78%	65%	78%	0%	71%	66%	70%	78%	80%	0%	81%	71%
Managing the pressure of water in your taps & the number of unplanned interruptions	58%	58%	59%	71%	56%	59%	62%	59%	56%	62%	41%	63%	0%	42%	64%	55%	68%	56%	0%	68%	51%
Handling customers' accounts, queries, complaints & customers with special needs	49%	48%	50%	71%	47%	52%	46%	52%	51%	43%	36%	52%	0%	33%	25%	59%	61%	50%	14%	61%	37%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	65%	64%	66%	71%	65%	65%	65%	68%	64%	62%	51%	69%	0%	52%	55%	63%	76%	65%	14%	72%	61%
Avoid the risk of homes & gardens being flooded with sewerage	67%	65%	69%	71%	70%	67%	63%	80%	66%	54%	61%	69%	0%	40%	59%	66%	88%	64%	6%	78%	60%
Managing the amount of water taken from the environment to supply customers	67%	69%	65%	71%	65%	75%	60%	79%	66%	54%	56%	70%	0%	34%	54%	76%	80%	69%	12%	77%	61%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	69%	67%	70%	100%	67%	72%	67%	80%	64%	61%	64%	70%	0%	48%	65%	75%	81%	67%	8%	78%	63%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	61%	69%	54%	56%	60%	63%	61%	69%	65%	46%	61%	62%	0%	49%	63%	63%	80%	53%	37%	73%	48%
Ensuring a reliable & continuous water supply	66%	70%	63%	56%	65%	69%	66%	77%	67%	54%	64%	67%	0%	50%	78%	67%	87%	55%	56%	75%	56%
Ensuring the safety of tap water	80%	84%	76%	100%	78%	84%	74%	82%	83%	72%	75%	81%	0%	75%	77%	81%	95%	72%	65%	83%	76%
Managing the appearance, taste & smell of tap water	64%	67%	61%	100%	63%	64%	64%	70%	67%	53%	73%	62%	0%	56%	75%	73%	81%	51%	39%	65%	65%
Managing the pressure of water in your taps & the number of unplanned interruptions	56%	60%	52%	27%	50%	64%	57%	63%	60%	41%	51%	57%	0%	43%	63%	63%	71%	47%	22%	64%	50%
Handling customers' accounts, queries, complaints & customers with special needs	51%	57%	46%	27%	50%	58%	48%	60%	54%	37%	41%	54%	0%	44%	46%	59%	66%	45%	37%	61%	40%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	60%	64%	57%	27%	59%	69%	54%	67%	65%	46%	51%	63%	0%	47%	56%	63%	77%	55%	36%	71%	49%
Avoid the risk of homes & gardens being flooded with sewerage	58%	61%	55%	27%	57%	61%	57%	61%	66%	44%	50%	60%	0%	49%	71%	71%	75%	44%	45%	67%	47%
Managing the amount of water taken from the environment to supply customers	52%	59%	45%	27%	49%	60%	47%	54%	61%	35%	41%	54%	0%	34%	48%	63%	67%	45%	41%	61%	40%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	51%	57%	46%	27%	51%	59%	42%	57%	56%	37%	42%	54%	0%	37%	49%	59%	74%	41%	42%	61%	40%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	55%	65%	45%	56%	51%	59%	58%	65%	58%	39%	44%	58%	0%	41%	53%	52%	76%	48%	37%	65%	44%
Ensuring a reliable & continuous water supply	60%	64%	56%	56%	56%	64%	63%	72%	60%	46%	46%	64%	0%	39%	66%	59%	83%	51%	56%	68%	50%
Ensuring the safety of tap water	74%	75%	73%	100%	73%	75%	72%	77%	73%	71%	58%	78%	0%	61%	78%	64%	94%	67%	65%	76%	71%
Managing the appearance, taste & smell of tap water	57%	59%	56%	100%	60%	51%	59%	67%	55%	49%	44%	61%	0%	43%	71%	53%	77%	47%	39%	60%	57%
Managing the pressure of water in your taps & the number of unplanned interruptions	46%	51%	42%	27%	45%	47%	50%	57%	50%	28%	30%	50%	0%	28%	39%	42%	67%	42%	22%	56%	35%
Handling customers' accounts, queries, complaints & customers with special needs	45%	49%	41%	27%	46%	41%	48%	55%	45%	32%	23%	50%	0%	34%	43%	42%	62%	39%	37%	55%	33%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	54%	58%	50%	27%	52%	57%	55%	64%	55%	40%	44%	56%	0%	42%	45%	48%	70%	52%	36%	62%	45%
Avoid the risk of homes & gardens being flooded with sewerage	50%	56%	45%	27%	45%	54%	56%	58%	56%	33%	27%	56%	0%	27%	55%	46%	70%	45%	31%	62%	36%
Managing the amount of water taken from the environment to supply customers	46%	53%	40%	27%	44%	55%	41%	52%	51%	33%	32%	50%	0%	24%	40%	44%	69%	41%	41%	56%	34%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	40%	45%	34%	56%	38%	46%	33%	42%	47%	26%	28%	42%	0%	12%	39%	52%	54%	35%	8%	49%	31%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	44%	49%	39%	27%	47%	44%	39%	47%	53%	28%	32%	47%	0%	22%	44%	47%	64%	37%	37%	50%	37%
Ensuring a reliable & continuous water supply	49%	51%	46%	27%	50%	49%	47%	53%	53%	37%	35%	52%	0%	27%	58%	59%	63%	40%	56%	53%	43%
Ensuring the safety of tap water	68%	66%	70%	71%	73%	67%	60%	66%	71%	67%	49%	73%	0%	63%	71%	64%	81%	62%	65%	68%	68%
Managing the appearance, taste & smell of tap water	51%	54%	48%	100%	55%	44%	50%	49%	55%	48%	44%	53%	0%	38%	72%	56%	62%	40%	39%	47%	58%
Managing the pressure of water in your taps & the number of unplanned interruptions	39%	44%	34%	27%	40%	38%	40%	41%	46%	27%	25%	43%	0%	28%	38%	41%	50%	36%	22%	45%	34%
Handling customers' accounts, queries, complaints & customers with special needs	36%	41%	32%	27%	40%	33%	35%	39%	41%	27%	18%	41%	0%	34%	32%	41%	42%	34%	37%	43%	27%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	47%	53%	42%	27%	50%	48%	42%	50%	52%	36%	37%	50%	0%	38%	40%	51%	56%	45%	36%	53%	41%
Avoid the risk of homes & gardens being flooded with sewerage	44%	45%	43%	27%	45%	44%	44%	46%	52%	32%	27%	49%	0%	23%	62%	45%	57%	37%	45%	51%	36%
Managing the amount of water taken from the environment to supply customers	35%	42%	29%	27%	36%	36%	33%	34%	44%	25%	23%	38%	0%	21%	34%	34%	39%	37%	41%	41%	27%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	31%	35%	27%	56%	31%	32%	28%	31%	38%	19%	23%	33%	0%	12%	32%	38%	39%	28%	8%	37%	25%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	4%
Ensuring a reliable & continuous water supply	2%
Ensuring the safety of tap water	3%
Managing the appearance, taste & smell of tap water	5%
Managing the pressure of water in your taps & the number of unplanned interruptions	4%
Handling customers' accounts, queries, complaints & customers with special needs	3%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	4%
Avoid the risk of homes & gardens being flooded with sewerage	4%
Managing the amount of water taken from the environment to supply customers	4%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	7%
Upgrade water pipes	1%
Introduce option of having a water meter	1%
Reduce chemical treatments in water supply	2%
No, none	74%
No of respondents	202

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	5%	6%	0%	4%	3%	10%	6%	5%	4%	4%	6%	0%	9%	5%	3%	3%	6%	0%	7%	3%
Very poor value	13%	17%	8%	0%	13%	8%	18%	11%	10%	19%	19%	11%	0%	21%	25%	16%	3%	11%	25%	12%	12%
Fairly poor value	20%	20%	19%	0%	22%	15%	23%	17%	19%	23%	21%	19%	0%	18%	25%	11%	15%	23%	59%	16%	20%
Neither poor nor good value	21%	13%	30%	44%	19%	26%	18%	16%	25%	23%	23%	21%	0%	36%	19%	26%	12%	23%	8%	18%	28%
Fairly good value	26%	26%	26%	56%	23%	34%	20%	32%	28%	15%	19%	28%	0%	6%	19%	29%	41%	24%	8%	30%	22%
Very good value	5%	9%	2%	0%	8%	5%	2%	9%	6%	2%	2%	6%	0%	3%	0%	3%	17%	2%	0%	8%	3%
Extremely good value	3%	1%	4%	0%	5%	0%	1%	2%	3%	2%	5%	2%	0%	0%	8%	4%	0%	3%	0%	1%	5%
Dont know/cant say	7%	9%	5%	0%	6%	8%	8%	7%	4%	12%	8%	7%	0%	7%	0%	7%	8%	9%	0%	8%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	9%	10%	7%	0%	7%	9%	12%	9%	7%	11%	14%	7%	0%	20%	5%	13%	3%	9%	7%	12%	5%
Very poor value	19%	20%	19%	0%	21%	15%	25%	18%	17%	25%	16%	20%	0%	29%	39%	8%	16%	17%	38%	17%	21%
Fairly poor value	22%	21%	23%	0%	25%	23%	18%	19%	22%	27%	36%	19%	0%	30%	21%	27%	10%	26%	39%	19%	26%
Neither poor nor good value	19%	15%	23%	44%	21%	17%	16%	17%	21%	18%	10%	21%	0%	11%	14%	19%	19%	22%	8%	14%	26%
Fairly good value	18%	16%	21%	56%	17%	23%	13%	23%	20%	11%	9%	21%	0%	0%	19%	16%	36%	13%	8%	25%	10%
Very good value	3%	5%	1%	0%	1%	5%	3%	3%	3%	2%	0%	3%	0%	3%	2%	4%	6%	1%	0%	4%	2%
Extremely good value	1%	0%	2%	0%	3%	0%	0%	2%	1%	0%	2%	1%	0%	0%	0%	0%	0%	3%	0%	0%	3%
Dont know/cant say	8%	12%	5%	0%	6%	8%	12%	9%	9%	7%	13%	7%	0%	7%	0%	13%	10%	9%	0%	9%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	21%	25%	18%	0%	15%	17%	39%	21%	17%	29%	26%	20%	0%	34%	37%	23%	10%	20%	18%	23%	19%
Very poor value	24%	22%	25%	0%	30%	21%	18%	29%	24%	19%	27%	23%	0%	21%	19%	30%	21%	26%	66%	21%	24%
Fairly poor value	19%	12%	26%	0%	21%	21%	14%	12%	20%	26%	22%	18%	0%	33%	24%	3%	15%	21%	8%	20%	20%
Neither poor nor good value	17%	18%	16%	44%	16%	20%	14%	20%	17%	14%	13%	18%	0%	5%	8%	16%	32%	15%	8%	14%	24%
Fairly good value	9%	12%	6%	56%	8%	10%	6%	8%	9%	9%	4%	10%	0%	0%	10%	8%	13%	8%	0%	13%	4%
Very good value	2%	3%	1%	0%	2%	4%	1%	3%	4%	0%	2%	2%	0%	0%	2%	7%	4%	1%	0%	3%	2%
Extremely good value	1%	0%	2%	0%	2%	0%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	2%
Dont know/cant say	7%	7%	6%	0%	6%	6%	8%	5%	9%	4%	6%	7%	0%	7%	0%	13%	5%	7%	0%	7%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	16%	20%	12%	0%	15%	15%	21%	17%	13%	19%	15%	17%	0%	23%	13%	16%	8%	20%	30%	21%	9%
Probably not willing to pay	28%	23%	32%	44%	26%	18%	42%	25%	23%	37%	39%	25%	0%	40%	37%	15%	21%	29%	39%	23%	33%
Probably willing to pay	40%	42%	38%	56%	41%	49%	26%	41%	44%	33%	32%	42%	0%	17%	34%	55%	58%	33%	31%	40%	42%
Definitely willing to pay	10%	8%	12%	0%	14%	11%	3%	16%	10%	4%	9%	11%	0%	7%	8%	7%	12%	11%	0%	9%	14%
Dont know/Cant say	6%	6%	6%	0%	4%	6%	8%	2%	9%	6%	6%	6%	0%	13%	9%	7%	0%	6%	0%	7%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	2%	0%	3%	0%	4%	0%	0%	0%	5%	0%	3%	1%	0%	0%	0%	0%	5%	2%	0%	2%	2%
Cost too much for improvement	62%	70%	54%	0%	57%	81%	55%	90%	61%	36%	71%	58%	0%	30%	63%	56%	95%	60%	42%	63%	63%
Cant afford it	31%	20%	41%	100%	32%	10%	41%	10%	26%	55%	25%	33%	0%	59%	37%	24%	0%	32%	49%	27%	33%
Dont know/Cant say	6%	10%	2%	0%	6%	9%	4%	0%	8%	9%	0%	8%	0%	11%	0%	20%	0%	6%	9%	8%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	88	44	45	1	35	21	30	28	29	31	21	67	0	13	12	6	14	43	6	49	33

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	21%	27%	15%	0%	13%	21%	35%	19%	19%	25%	20%	21%	0%	32%	35%	14%	12%	20%	45%	22%	16%
Probably not willing to pay	34%	30%	38%	44%	41%	25%	32%	33%	31%	40%	40%	33%	0%	49%	24%	27%	34%	35%	25%	28%	43%
Probably willing to pay	31%	29%	34%	56%	30%	40%	20%	37%	32%	23%	30%	32%	0%	3%	27%	41%	49%	27%	31%	33%	29%
Definitely willing to pay	7%	7%	7%	0%	8%	7%	4%	8%	9%	2%	4%	7%	0%	3%	5%	8%	6%	8%	0%	6%	8%
Dont know/Cant say	7%	8%	7%	0%	7%	7%	9%	2%	9%	11%	6%	8%	0%	13%	9%	10%	0%	9%	0%	10%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	3	87	64	48	68	78	55	40	161	0	20	25	20	49	88	9	113	79

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	1%	0%	1%	0%	2%	0%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	2%
Cost too much for improvement	70%	82%	58%	0%	73%	83%	56%	92%	75%	43%	69%	70%	0%	35%	65%	91%	100%	66%	42%	74%	69%
Cant afford it	28%	16%	39%	100%	24%	15%	42%	8%	19%	57%	31%	27%	0%	65%	35%	0%	0%	30%	49%	24%	29%
Dont know/Cant say	2%	2%	1%	0%	1%	2%	2%	0%	5%	0%	0%	2%	0%	0%	0%	9%	0%	2%	9%	1%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	110	56	54	1	47	29	32	36	39	36	24	86	0	16	15	8	23	48	6	57	47

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	39%	38%	40%	0%	32%	34%	60%	43%	32%	45%	42%	38%	0%	50%	48%	31%	23%	45%	56%	39%	38%
Probably not willing to pay	26%	28%	25%	44%	31%	25%	19%	21%	31%	26%	30%	25%	0%	36%	20%	28%	37%	19%	31%	23%	31%
Probably willing to pay	22%	20%	24%	56%	22%	29%	10%	26%	22%	18%	16%	23%	0%	0%	18%	38%	32%	19%	8%	25%	19%
Definitely willing to pay	5%	5%	5%	0%	6%	6%	2%	8%	6%	0%	2%	6%	0%	0%	5%	3%	6%	6%	6%	4%	6%
Dont know/Cant say	8%	8%	7%	0%	8%	7%	8%	2%	10%	11%	10%	7%	0%	13%	9%	0%	1%	12%	0%	9%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	1%	0%	1%	0%	1%	0%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	0%	1%
Cost too much for improvement	65%	76%	54%	0%	66%	75%	56%	89%	67%	34%	68%	64%	0%	32%	67%	78%	91%	58%	53%	71%	58%
Cant afford it	33%	22%	44%	100%	31%	23%	41%	11%	27%	66%	32%	33%	0%	68%	33%	12%	9%	39%	39%	27%	39%
Dont know/Cant say	2%	3%	1%	0%	1%	2%	3%	0%	5%	0%	0%	2%	0%	0%	0%	10%	0%	2%	8%	2%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	130	65	65	1	55	35	38	44	48	38	28	101	0	17	16	12	30	54	7	69	53

Southern Water

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	17%	21%	13%	0%	16%	12%	26%	21%	18%	11%	24%	15%	0%	17%	8%	9%	20%	19%	35%	25%	4%
Not very concerned	22%	25%	19%	44%	24%	19%	19%	22%	21%	22%	31%	19%	0%	18%	29%	33%	18%	20%	0%	19%	28%
Fairly concerned	32%	27%	37%	56%	31%	35%	27%	28%	33%	33%	19%	35%	0%	11%	37%	44%	33%	31%	36%	26%	39%
Very concerned	24%	24%	24%	0%	22%	33%	17%	26%	23%	24%	11%	27%	0%	38%	11%	11%	22%	29%	28%	27%	19%
Dont know/cant say	6%	4%	7%	0%	6%	1%	11%	3%	5%	10%	15%	3%	0%	16%	14%	3%	7%	1%	0%	3%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	100	100	3	87	63	48	66	79	55	40	160	0	20	25	20	48	88	9	113	78

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	9%	9%	8%	0%	11%	10%	5%	13%	6%	7%	8%	9%	0%	0%	2%	4%	7%	15%	0%	3%	18%
Ensuring a reliable & continuous water supply	7%	7%	6%	29%	7%	7%	4%	4%	10%	4%	10%	6%	0%	3%	9%	3%	4%	9%	0%	5%	9%
Ensuring the safety of tap water	31%	26%	35%	0%	38%	37%	10%	34%	27%	32%	17%	34%	0%	24%	21%	36%	31%	34%	57%	28%	31%
Managing the appearance, taste & smell of tap water	7%	7%	6%	0%	6%	10%	4%	10%	4%	6%	8%	7%	0%	0%	13%	11%	6%	6%	0%	4%	12%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%	4%	1%	0%	1%	7%	0%	3%	4%	0%	0%	3%	0%	0%	6%	8%	4%	0%	0%	4%	1%
Handling customers' accounts, queries, complaints & customers with special needs	1%	0%	1%	0%	0%	1%	1%	0%	2%	0%	2%	0%	0%	3%	0%	3%	0%	0%	0%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	16%	14%	17%	56%	19%	17%	6%	13%	20%	13%	7%	18%	0%	16%	9%	11%	3%	25%	14%	15%	17%
Avoid the risk of homes & gardens being flooded with sewerage	4%	1%	7%	0%	4%	7%	1%	5%	4%	2%	0%	5%	0%	3%	0%	4%	12%	1%	8%	7%	0%
Managing the amount of water taken from the environment to supply customers	4%	7%	2%	0%	5%	7%	0%	9%	2%	2%	3%	5%	0%	6%	3%	0%	4%	5%	0%	4%	5%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	7%	7%	6%	0%	10%	8%	0%	13%	6%	0%	0%	8%	0%	0%	3%	7%	16%	4%	0%	10%	2%
No of respondents	202	100	102	3	87	65	48	68	79	55	40	162	0	20	25	20	49	88	9	113	80

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			0					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban	urben
Bills change every year according to amount of work	12%	12%	12%	0%	15%	10%	11%	19%	7%	11%	7%	13%	13%	6%	3%	23%	9%	29%	16%	5%	13%
Bills show one big change in first year	5%	3%	6%	0%	7%	2%	5%	5%	5%	4%	0%	6%	0%	0%	6%	6%	6%	12%	6%	3%	10%
Bills change steadily every year	83%	85%	82%	100%	78%	88%	85%	76%	88%	85%	93%	81%	87%	94%	90%	70%	85%	59%	78%	93%	78%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	199	97	102	3	87	65	45	65	79	55	39	160	20	24	20	49	86	9	111	79	1726

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£15)	Maintain current service (£19)	Maintain current service (£33)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£14)	Maintain current service (£13)	Maintain current service (£13)
	3. Ensuring the safety of tap water	Meet current and future standards at 8 of treatment works.Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 43,506 of water company lead pipes replaced to meet new lead standard (£4)	Meet current and future standards at 8 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 43,506 of water company lead pipes replaced to meet new lead standard (£4)	Meet current and future standards at 8 of treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 82,863 of water company lead pipes replaced to meet new lead standard (£6)
	4. Managing the appearance, taste and smell of tap water	Ensure no increase in the number of customer complaints about the appearance, taste or smell of tap water (£0)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£0)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£0)
	5. Managing the pressure of water in your taps and interruptions to supply	Reduce the number of properties at risk of low water pressure at the tap from 500 to 375 (Less than £1)	Reduce the number of properties at risk of low water pressure at the tap from 500 to 375 (Less than £1)	Reduce the number of properties at risk of low water pressure at the tap from 500 to 375 (Less than £1)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce odour problems from 10 sewage treatment works (£9)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£0)	48 Km of rivers can better support fish and rare wildlife. 3 wetlands and lakes are restored and protected to support rare wildlife (£3)	108 Km of rivers can better support fish and rare wildlife. 5 wetlands and lakes are restored and protected to support rare wildlife (£5)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	180 Km of rivers can better support fish, 135 Km of rivers and 80 Km2 of coastal waters can support rare wildlife,1 lake improved and can support rare wildlife (£43)	237 Km of rivers can better support fish, 179 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lake improved and can support rare wildlife (£57)	569 Km of rivers can better support fish, 205 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lakes improved and can support rare wildlife. (£89)
		Overall cost on average bill taking account of cost savings by 2010 is £87 (excluding inflation). Overall bill [illegible]	Overall cost on average bill taking account of cost savings by 2010 is £102 (excluding inflation). Overall bill by 2010 is £353 [illegible]	Overall cost on average bill by 2010 is £149 (excluding inflation) Overall bill by 2010 is £400 (plus inflation)

1. Key Findings

Folkestone & Dover Water is a water supply only company providing water services to a population of 162,000. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £72
Reference Plan A - £130
Reference Plan B - £160

☐ 70% of customers said they are satisfied with the current service provided and only 14% are dissatisfied. 55% regard the service as good value for money; 20% regard the service as poor value for money.

☐ 91-99% of customers wish for services to be maintained at the current level, and generally about 80% would like services to be improved. Customers thought it most important to maintain the 'safety of tap water' (99%), 'ensure a reliable and continuous water supply' and 'manage the appearance taste and smell of tap water' (both 98%). Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs', 'avoiding the risk of homes and gardens being flooded with sewage', 'managing the amount of water taken from the environment to supply customers' and 'managing the effect of water company activities on the quality of rivers, wetlands and coastal waters (all 91%).

☐ Customers thought it most important for improvements to the 'management of the appearance taste and smell of tap water' (86%) and 'safety of tap water' (83%) to be introduced by 2010. Least importance was attached to improvements in 'handling customer accounts, queries, complaints and customers with special needs' (74%).

☐ The Company Preferred Plan has the same high level of approval as Reference Plans A and B, with approximately 85% of customers support. Across all three plans (each of which proposed a combination of maintained and improved services), proposals to 'ensure the safety of tap water' had the greatest customer approval (90%-91%), followed by proposals to 'maintain water pipes, treatment works and reservoirs' (89%-90%) and 'manage the appearance, taste and smell of tap water' (88%). Customer support for proposals pertaining to 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' was at it's lowest within all three plans (64%-79%).

☐ When asked to identify service areas where they would like to see further improvements to those noted in the plans, 80% said ‘none’.

☐ Between 9% and 27% of customers thought that the plans represented good value for money (27% for the Company Preferred Plan, 21% for Reference Plan A and 9% for Reference Plan B. The more common view was that the plans represented poor value for money, and this proportion ranged from 42% for the Company Preferred Plan, 46% for Reference Plan A to 59% for Reference Plan B.

☐ Customers reported that they were about equally (55% and 52%) willing to pay for the Company Preferred Plan (48% probably willing, 7% definitely willing) and Reference Plan A (45% probably willing, 7% definitely willing). Comparatively, 42% were willing to pay for Reference Plan B (36% probably willing, 6% definitely willing). The proportion of customers 'not willing to pay' ranged from 34% for the Company Preferred Plan (25% probably not willing, 9% definitely not willing), 35% for Reference Plan A (26% probably not willing, 9% definitely not willing) to 45% for Reference Plan B (27% probably not willing, 18% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (51% Company Preferred Plan, 46% Reference Plan A and 59% Reference Plan B). A total of 10% of all Folkestone and Dover customers indicated that they could not afford the bill increases set out in each of the proposed company plans.

☐ 55% of customers said they would not be very or at all concerned if some improvements had to be delayed until after 2010. Of the 29% who were concerned, the greatest concerns were delays to 'ensuring the safety of tap water' and 'maintaining sewers, sewage treatment works, ensuring the network meets new demands and controlling smells from sewage works' (9% for both). 0% of customers were concerned about delays in improvement programmes to 'manage the pressure of water in the taps, and the number of interruptions' and in 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 84% of Folkestone and Dover Water customers indicated that their preferred bill option for the period 2005 to 2010 is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were 'ensuring the safety of tap water' (at a cost of £2-£23/annum), 'managing the appearance, taste and smell of tap water' (at no extra cost), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£3/annum).

2. Introduction

The attitudes and preferences of Folkestone and Dover Water customers, reported in section 3, are based on a sample of 218 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.89% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 4 written customer complaints about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	11 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	507 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	2 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	83% of rivers are of good, 10% fair and 7% poor quality, 99% of designated bathing waters meet minimum standards and 76% meet higher standards.,58% of rivers may be at risk from weed growth that can adversely affect wildlife

Average bill in this area = £298 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	2%	4%	0%	0%	1%	2%	3%	6%	1%	0%	0%	1%	0%	4%	0%	0%	10%	0%	4%	0%	2%
Very dissatisfied	3%	2%	4%	0%	4%	2%	3%	0%	4%	4%	3%	3%	0%	4%	11%	0%	5%	0%	3%	1%	4%
Fairly dissatisfied	9%	10%	8%	14%	5%	13%	8%	17%	3%	9%	10%	8%	28%	14%	0%	7%	11%	9%	0%	8%	13%
Neither satisfied nor dissatisfied	15%	20%	9%	0%	24%	10%	11%	11%	17%	15%	8%	16%	39%	13%	26%	8%	20%	13%	20%	2%	20%
Fairly satisfied	33%	26%	40%	29%	37%	35%	27%	27%	42%	28%	35%	34%	0%	29%	22%	39%	41%	35%	30%	38%	31%
Very satisfied	26%	24%	28%	50%	23%	22%	27%	29%	21%	29%	29%	25%	32%	23%	19%	35%	8%	31%	31%	38%	17%
Extremely satisfied	11%	12%	10%	0%	4%	13%	20%	7%	10%	15%	15%	10%	0%	13%	22%	9%	5%	9%	12%	10%	11%
Dont know/cant say	2%	2%	1%	7%	1%	2%	0%	3%	2%	0%	0%	2%	0%	0%	0%	3%	0%	3%	0%	3%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	4%	3%	0%	3%	2%	8%	3%	5%	2%	3%	4%	0%	9%	5%	0%	5%	1%	0%	0%	7%
Very poor value	7%	7%	6%	14%	6%	7%	5%	6%	6%	8%	1%	7%	0%	11%	10%	3%	18%	2%	6%	4%	8%
Fairly poor value	10%	10%	9%	7%	8%	10%	12%	8%	13%	8%	8%	11%	0%	14%	3%	17%	3%	9%	16%	5%	9%
Neither poor nor good value	22%	28%	15%	14%	23%	25%	18%	24%	23%	18%	14%	23%	39%	18%	17%	19%	36%	21%	23%	19%	23%
Fairly good value	38%	31%	44%	52%	45%	37%	22%	42%	35%	36%	45%	37%	0%	22%	40%	29%	30%	50%	43%	41%	34%
Very good value	16%	14%	18%	13%	11%	14%	27%	10%	14%	24%	26%	13%	32%	15%	16%	26%	8%	16%	12%	28%	10%
Extremely good value	1%	0%	1%	0%	0%	0%	3%	2%	0%	0%	3%	0%	0%	3%	0%	0%	0%	0%	0%	0%	1%
Dont know/cant say	4%	5%	4%	0%	4%	5%	5%	6%	4%	4%	0%	5%	28%	9%	9%	7%	0%	1%	0%	4%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	95%	94%	96%	100%	93%	95%	96%	94%	95%	96%	91%	96%	100%	95%	89%	100%	100%	94%	95%	95%	95%
Ensuring a reliable & continuous water supply	98%	97%	99%	100%	98%	97%	99%	100%	97%	98%	100%	97%	100%	95%	97%	100%	100%	99%	99%	97%	98%
Ensuring the safety of tap water	99%	100%	99%	100%	99%	99%	100%	100%	99%	100%	100%	99%	100%	99%	100%	100%	100%	99%	97%	100%	100%
Managing the appearance, taste & smell of tap water	98%	98%	97%	79%	99%	98%	99%	100%	98%	96%	99%	97%	100%	97%	98%	100%	95%	99%	99%	96%	99%
Managing the pressure of water in your taps & the number of unplanned interruptions	95%	94%	95%	86%	91%	97%	98%	97%	93%	95%	96%	95%	87%	95%	88%	95%	100%	95%	97%	97%	92%
Handling customers' accounts, queries, complaints & customers with special needs	91%	91%	92%	86%	86%	96%	93%	95%	89%	91%	90%	92%	72%	79%	91%	93%	93%	97%	91%	93%	90%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	95%	94%	95%	93%	93%	97%	94%	94%	94%	96%	99%	93%	100%	94%	85%	97%	100%	95%	99%	98%	91%
Avoid the risk of homes & gardens being flooded with sewerage	91%	93%	89%	93%	89%	96%	88%	95%	84%	96%	94%	90%	100%	87%	87%	92%	100%	92%	96%	92%	90%
Managing the amount of water taken from the environment to supply customers	91%	90%	91%	80%	90%	96%	84%	95%	85%	93%	92%	90%	100%	86%	89%	88%	98%	92%	99%	89%	88%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	91%	89%	92%	94%	87%	97%	86%	92%	87%	94%	90%	92%	72%	86%	92%	97%	98%	89%	99%	89%	89%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	79%	74%	84%	72%	72%	85%	81%	83%	72%	83%	83%	80%	32%	76%	70%	65%	78%	87%	80%	76%	81%
Ensuring a reliable & continuous water supply	80%	74%	85%	79%	74%	86%	78%	81%	76%	83%	83%	81%	32%	74%	73%	68%	78%	88%	80%	78%	81%
Ensuring the safety of tap water	83%	79%	87%	72%	79%	87%	85%	83%	78%	88%	85%	84%	61%	83%	81%	65%	80%	89%	81%	80%	86%
Managing the appearance, taste & smell of tap water	86%	82%	89%	79%	81%	88%	89%	86%	83%	89%	83%	86%	84%	89%	76%	79%	82%	89%	82%	83%	89%
Managing the pressure of water in your taps & the number of unplanned interruptions	82%	77%	87%	79%	77%	87%	82%	86%	74%	88%	82%	83%	61%	83%	68%	71%	85%	88%	82%	79%	85%
Handling customers' accounts, queries, complaints & customers with special needs	74%	67%	81%	72%	64%	84%	74%	76%	70%	78%	76%	75%	32%	68%	70%	58%	71%	84%	83%	74%	72%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	81%	78%	85%	79%	67%	92%	85%	91%	74%	81%	88%	81%	32%	75%	68%	74%	78%	91%	87%	83%	78%
Avoid the risk of homes & gardens being flooded with sewerage	81%	77%	85%	79%	68%	90%	85%	86%	75%	83%	85%	82%	32%	73%	77%	72%	72%	91%	87%	81%	79%
Managing the amount of water taken from the environment to supply customers	80%	77%	82%	79%	66%	91%	80%	86%	75%	79%	88%	78%	32%	65%	67%	77%	80%	91%	81%	81%	78%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	78%	73%	83%	79%	66%	87%	79%	83%	73%	79%	83%	78%	32%	67%	59%	74%	80%	89%	81%	76%	78%
No of respondents	217	107	110	10	73	79	52	64	82	71	47	161	6	47	24	27	25	93	41	67	108

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	90%	87%	92%	73%	87%	95%	88%	94%	90%	85%	93%	89%	72%	91%	87%	85%	83%	93%	88%	89%	90%
Ensuring a reliable & continuous water supply	83%	79%	87%	79%	78%	91%	79%	91%	84%	75%	87%	83%	44%	75%	87%	85%	85%	85%	80%	87%	81%
Ensuring the safety of tap water	91%	87%	94%	79%	87%	96%	90%	94%	92%	86%	93%	91%	72%	93%	95%	88%	85%	91%	84%	89%	94%
Managing the appearance, taste & smell of tap water	88%	86%	90%	79%	85%	93%	88%	92%	91%	83%	85%	90%	72%	93%	90%	88%	85%	86%	77%	87%	93%
Managing the pressure of water in your taps & the number of unplanned interruptions	85%	85%	86%	66%	81%	91%	86%	92%	87%	77%	85%	86%	72%	90%	82%	82%	85%	85%	78%	85%	88%
Handling customers' accounts, queries, complaints & customers with special needs	85%	85%	85%	66%	81%	92%	84%	92%	85%	79%	84%	86%	72%	86%	88%	82%	85%	85%	75%	85%	89%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	88%	86%	89%	73%	86%	93%	84%	94%	88%	82%	88%	88%	72%	88%	85%	85%	85%	89%	86%	86%	89%
Avoid the risk of homes & gardens being flooded with sewerage	85%	83%	87%	72%	81%	94%	80%	91%	85%	79%	88%	84%	72%	86%	79%	83%	85%	87%	81%	84%	87%
Managing the amount of water taken from the environment to supply customers	83%	83%	83%	66%	79%	90%	80%	89%	84%	75%	85%	82%	72%	83%	80%	75%	85%	85%	77%	84%	84%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	79%	78%	81%	66%	77%	87%	73%	88%	78%	73%	88%	77%	72%	71%	80%	80%	83%	82%	78%	85%	76%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	88%	87%	89%	73%	82%	97%	86%	94%	88%	83%	93%	87%	72%	88%	80%	87%	85%	92%	90%	90%	87%
Ensuring a reliable & continuous water supply	80%	76%	84%	79%	72%	89%	77%	83%	82%	75%	79%	81%	44%	74%	77%	76%	80%	85%	82%	84%	76%
Ensuring the safety of tap water	90%	87%	93%	86%	83%	99%	86%	91%	91%	87%	93%	89%	100%	93%	88%	85%	85%	91%	85%	88%	93%
Managing the appearance, taste & smell of tap water	88%	86%	89%	73%	80%	97%	86%	91%	89%	84%	84%	88%	100%	97%	85%	82%	83%	87%	82%	87%	90%
Managing the pressure of water in your taps & the number of unplanned interruptions	84%	85%	82%	66%	74%	95%	84%	89%	86%	77%	84%	84%	72%	87%	85%	77%	83%	84%	82%	85%	84%
Handling customers' accounts, queries, complaints & customers with special needs	83%	84%	83%	66%	76%	95%	79%	86%	86%	78%	84%	84%	72%	82%	77%	79%	85%	87%	86%	86%	81%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	86%	83%	88%	73%	78%	95%	83%	94%	87%	76%	88%	85%	72%	88%	77%	83%	83%	88%	82%	87%	86%
Avoid the risk of homes & gardens being flooded with sewerage	85%	83%	87%	79%	78%	95%	80%	88%	89%	78%	84%	86%	72%	86%	80%	88%	85%	85%	82%	88%	84%
Managing the amount of water taken from the environment to supply customers	84%	82%	85%	66%	79%	91%	82%	91%	86%	74%	88%	82%	72%	87%	77%	74%	85%	86%	82%	86%	83%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	78%	77%	79%	72%	71%	91%	69%	86%	78%	72%	88%	75%	72%	71%	75%	71%	80%	84%	79%	88%	72%
No of respondents	217	107	110	10	74	79	52	64	83	71	47	162	6	47	25	27	25	92	41	67	108

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	89%	89%	90%	73%	83%	97%	90%	94%	91%	83%	93%	89%	72%	88%	82%	85%	85%	95%	93%	89%	88%
Ensuring a reliable & continuous water supply	85%	83%	88%	66%	80%	92%	86%	91%	87%	78%	88%	86%	44%	82%	77%	82%	83%	91%	88%	87%	83%
Ensuring the safety of tap water	90%	87%	92%	79%	85%	96%	89%	91%	91%	86%	91%	90%	72%	90%	82%	92%	83%	93%	87%	91%	90%
Managing the appearance, taste & smell of tap water	88%	88%	89%	79%	83%	93%	91%	92%	91%	82%	85%	90%	72%	93%	80%	87%	85%	90%	81%	88%	91%
Managing the pressure of water in your taps & the number of unplanned interruptions	85%	86%	84%	66%	77%	93%	88%	92%	87%	77%	85%	85%	72%	89%	77%	82%	83%	87%	81%	87%	85%
Handling customers' accounts, queries, complaints & customers with special needs	85%	87%	84%	72%	81%	93%	81%	89%	89%	78%	85%	86%	72%	84%	77%	84%	85%	89%	86%	87%	85%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	85%	82%	88%	73%	80%	93%	82%	88%	89%	77%	88%	86%	72%	85%	77%	85%	75%	90%	80%	88%	85%
Avoid the risk of homes & gardens being flooded with sewerage	85%	82%	88%	79%	82%	92%	81%	88%	88%	79%	88%	86%	72%	85%	80%	90%	75%	89%	80%	88%	86%
Managing the amount of water taken from the environment to supply customers	83%	83%	84%	73%	79%	88%	83%	89%	86%	75%	85%	83%	72%	86%	75%	77%	85%	86%	81%	88%	81%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	64%	59%	68%	73%	60%	69%	58%	65%	59%	68%	59%	65%	61%	53%	54%	67%	61%	72%	60%	74%	58%
No of respondents	217	107	110	10	74	79	52	64	83	71	47	162	6	47	25	27	25	92	41	67	108

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	2%
Ensuring a reliable & continuous water supply	2%
Ensuring the safety of tap water	6%
Managing the appearance, taste & smell of tap water	4%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%
Handling customers' accounts, queries, complaints & customers with special needs	4%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	6%
Avoid the risk of homes & gardens being flooded with sewerage	3%
Managing the amount of water taken from the environment to supply customers	2%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%
(further) reduce limescale in water	1%
Reduce chemical treatments in water supply	1%
Speed up process of repairs	1%
maintain the correct service level	1%
Reduce risk of floods	1%
Recycle more water	1%
No, none	80%
No of respondents	218

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	6%	6%	6%	14%	9%	3%	5%	3%	7%	7%	1%	8%	0%	9%	2%	8%	10%	3%	2%	0%	10%
Very poor value	11%	11%	11%	0%	8%	12%	16%	5%	14%	12%	11%	10%	20%	11%	8%	12%	5%	13%	9%	7%	14%
Fairly poor value	25%	27%	23%	43%	22%	25%	28%	32%	24%	21%	16%	27%	28%	35%	12%	28%	30%	22%	25%	30%	23%
Neither poor nor good value	27%	26%	27%	35%	25%	31%	20%	16%	29%	33%	29%	25%	52%	26%	44%	33%	13%	24%	33%	24%	26%
Fairly good value	22%	19%	25%	7%	32%	23%	8%	29%	19%	20%	38%	19%	0%	9%	25%	6%	40%	28%	29%	28%	16%
Very good value	3%	4%	1%	0%	4%	4%	0%	3%	3%	2%	0%	4%	0%	0%	0%	8%	3%	4%	0%	5%	2%
Extremely good value	2%	1%	2%	0%	0%	1%	5%	2%	1%	2%	3%	1%	0%	3%	0%	0%	0%	2%	0%	3%	1%
Dont know/cant say	5%	6%	4%	0%	1%	1%	17%	10%	2%	3%	2%	6%	0%	6%	9%	6%	0%	4%	1%	4%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	9%	7%	11%	14%	10%	7%	11%	3%	13%	11%	4%	11%	0%	11%	5%	20%	7%	7%	4%	1%	16%
Very poor value	14%	17%	11%	7%	13%	12%	20%	13%	12%	17%	13%	13%	48%	19%	15%	17%	14%	10%	8%	11%	18%
Fairly poor value	23%	27%	20%	51%	19%	23%	25%	27%	23%	20%	21%	23%	41%	25%	20%	29%	16%	23%	11%	32%	22%
Neither poor nor good value	29%	20%	38%	21%	30%	31%	24%	38%	26%	24%	32%	29%	11%	27%	34%	20%	35%	30%	45%	23%	27%
Fairly good value	18%	21%	14%	7%	22%	20%	10%	11%	20%	21%	28%	15%	0%	14%	25%	11%	18%	18%	24%	21%	13%
Very good value	2%	1%	3%	0%	5%	2%	0%	0%	4%	2%	0%	3%	0%	0%	0%	0%	3%	5%	4%	4%	1%
Extremely good value	1%	3%	0%	0%	0%	2%	2%	3%	0%	2%	0%	2%	0%	0%	0%	0%	0%	3%	0%	2%	2%
Dont know/cant say	3%	4%	3%	0%	1%	2%	9%	6%	2%	3%	2%	3%	0%	4%	0%	3%	7%	3%	5%	5%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	217	107	110	10	73	79	52	64	83	71	47	163	6	47	25	26	25	93	40	68	108

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	20%	22%	19%	7%	22%	21%	21%	14%	21%	26%	13%	22%	20%	21%	26%	28%	29%	14%	13%	12%	29%
Very poor value	16%	16%	16%	43%	17%	12%	16%	10%	20%	15%	12%	15%	69%	24%	16%	17%	16%	11%	15%	16%	16%
Fairly poor value	23%	21%	24%	13%	21%	27%	21%	33%	22%	14%	32%	21%	11%	17%	13%	23%	31%	25%	30%	25%	18%
Neither poor nor good value	28%	26%	29%	30%	24%	32%	24%	35%	22%	29%	29%	29%	0%	27%	34%	16%	21%	32%	31%	29%	26%
Fairly good value	7%	7%	7%	7%	13%	4%	5%	0%	9%	11%	12%	6%	0%	4%	11%	7%	3%	9%	10%	7%	6%
Very good value	2%	3%	1%	0%	2%	3%	2%	3%	1%	4%	0%	3%	0%	0%	0%	5%	0%	4%	0%	5%	2%
Extremely good value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	4%	5%	3%	0%	1%	2%	11%	5%	4%	1%	2%	4%	0%	7%	0%	3%	0%	4%	1%	6%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	8%	9%	7%	14%	8%	3%	9%	8%	10%	3%	11%	0%	6%	13%	8%	10%	9%	13%	2%	12%
Probably not willing to pay	25%	24%	26%	58%	17%	25%	31%	26%	22%	29%	25%	23%	61%	39%	12%	20%	26%	23%	28%	27%	23%
Probably willing to pay	48%	49%	48%	28%	50%	54%	39%	54%	54%	37%	62%	45%	39%	43%	59%	56%	65%	42%	40%	48%	52%
Definitely willing to pay	7%	9%	6%	0%	13%	7%	2%	0%	6%	15%	1%	9%	0%	3%	5%	10%	0%	12%	14%	9%	4%
Dont know/Cant say	10%	10%	10%	7%	6%	5%	25%	12%	10%	9%	8%	11%	0%	9%	11%	7%	0%	14%	4%	14%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	5%	13%	0%	0%	8%	8%	0%	20%	0%	0%	0%	7%	0%	0%	0%	0%	21%	8%	0%	10%	5%
Cost too much for improvements	51%	58%	46%	85%	57%	63%	19%	57%	59%	40%	45%	51%	54%	25%	30%	80%	79%	60%	86%	52%	36%
Cant afford it	34%	25%	40%	15%	24%	18%	72%	23%	25%	49%	50%	30%	46%	57%	47%	9%	0%	29%	7%	34%	45%
Too much & cant afford it	9%	2%	13%	0%	10%	9%	9%	0%	13%	11%	5%	11%	0%	17%	23%	10%	0%	0%	8%	0%	14%
Dont know/Cant say	1%	2%	0%	0%	0%	3%	0%	0%	3%	0%	0%	1%	0%	0%	0%	0%	0%	3%	0%	4%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	68	29	39	5	22	23	18	18	24	26	13	50	4	21	6	7	9	24	15	18	35

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	10%	9%	7%	8%	11%	9%	8%	10%	10%	9%	10%	0%	11%	7%	11%	2%	10%	7%	6%	12%
Probably not willing to pay	26%	22%	30%	58%	23%	26%	23%	24%	24%	30%	22%	27%	32%	27%	20%	20%	31%	28%	25%	32%	23%
Probably willing to pay	45%	45%	45%	28%	54%	44%	39%	48%	52%	34%	56%	42%	39%	43%	61%	55%	59%	35%	41%	40%	49%
Definitely willing to pay	7%	8%	6%	0%	10%	8%	3%	2%	6%	13%	1%	9%	0%	3%	2%	8%	0%	12%	19%	9%	2%
Dont know/Cant say	12%	15%	10%	7%	5%	12%	26%	17%	8%	13%	12%	11%	28%	16%	9%	7%	7%	14%	8%	13%	14%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	217	107	110	10	73	79	52	64	83	71	47	163	6	47	25	26	25	93	40	68	108

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	8%	16%	1%	0%	8%	11%	4%	20%	2%	5%	0%	8%	61%	0%	0%	15%	25%	8%	4%	14%	5%
Cost too much for improvements	46%	54%	39%	100%	41%	60%	11%	37%	58%	39%	58%	43%	39%	18%	37%	59%	42%	62%	70%	51%	34%
Cant afford it	31%	21%	39%	0%	27%	11%	82%	32%	23%	38%	42%	29%	0%	59%	63%	8%	0%	20%	0%	28%	43%
Too much & cant afford it	10%	4%	14%	0%	12%	13%	4%	0%	9%	18%	0%	12%	0%	23%	0%	9%	26%	0%	9%	0%	16%
Dont know/Cant say	6%	4%	7%	0%	12%	5%	0%	11%	7%	0%	0%	7%	0%	0%	0%	8%	8%	9%	17%	6%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	69	31	38	5	22	26	15	19	27	23	13	54	2	17	7	8	7	29	12	21	35

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	18%	19%	16%	21%	19%	20%	12%	17%	19%	17%	8%	20%	13%	22%	16%	13%	24%	15%	11%	17%	21%
Probably not willing to pay	27%	26%	28%	36%	26%	26%	30%	34%	23%	25%	32%	26%	31%	32%	26%	30%	42%	19%	33%	28%	24%
Probably willing to pay	36%	34%	39%	28%	38%	38%	31%	35%	43%	30%	44%	35%	28%	27%	46%	40%	29%	40%	37%	33%	37%
Definitely willing to pay	6%	6%	5%	0%	11%	4%	2%	0%	3%	13%	3%	7%	0%	2%	6%	7%	0%	9%	12%	7%	3%
Dont know/Cant say	13%	14%	13%	15%	6%	13%	24%	14%	12%	15%	13%	13%	28%	17%	7%	9%	4%	17%	7%	15%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	6%	8%	3%	0%	13%	3%	0%	6%	2%	10%	0%	6%	45%	0%	14%	11%	15%	0%	0%	4%	9%
Cost too much for improvements	59%	71%	47%	100%	56%	72%	33%	68%	62%	44%	60%	58%	55%	39%	59%	75%	69%	65%	78%	75%	42%
Cant afford it	23%	13%	32%	0%	21%	7%	56%	19%	17%	35%	37%	21%	0%	45%	28%	0%	0%	23%	0%	21%	32%
Too much & cant afford it	8%	4%	11%	0%	4%	10%	11%	0%	12%	11%	4%	9%	0%	17%	0%	7%	11%	0%	10%	0%	11%
Dont know/Cant say	5%	3%	7%	0%	6%	8%	0%	7%	8%	0%	0%	7%	0%	0%	0%	6%	5%	12%	12%	0%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	91	45	46	4	32	35	21	31	35	26	18	69	3	26	10	11	17	28	17	28	46

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	20%	23%	16%	27%	16%	12%	36%	20%	21%	17%	16%	22%	0%	33%	11%	22%	7%	18%	24%	16%	21%
Not very concerned	35%	30%	40%	59%	45%	32%	19%	29%	36%	39%	44%	32%	52%	24%	42%	24%	33%	43%	31%	45%	30%
Fairly concerned	20%	22%	17%	0%	20%	25%	16%	30%	20%	11%	19%	21%	0%	17%	5%	23%	27%	22%	19%	16%	22%
Very concerned	9%	11%	8%	0%	8%	17%	2%	11%	10%	8%	5%	10%	0%	7%	13%	13%	20%	6%	18%	7%	8%
Dont know/cant say	16%	13%	19%	14%	12%	13%	27%	10%	12%	26%	15%	15%	48%	20%	28%	18%	13%	11%	9%	15%	19%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	3%	2%	4%	0%	4%	5%	0%	5%	2%	2%	3%	3%	0%	3%	3%	7%	0%	3%	7%	3%	2%
Ensuring a reliable & continuous water supply	4%	5%	3%	0%	5%	6%	1%	5%	6%	2%	2%	5%	0%	1%	3%	0%	10%	6%	0%	3%	7%
Ensuring the safety of tap water	9%	11%	7%	0%	11%	14%	0%	8%	10%	8%	10%	9%	0%	2%	5%	10%	17%	11%	17%	7%	7%
Managing the appearance, taste & smell of tap water	3%	1%	5%	0%	3%	5%	0%	5%	4%	0%	3%	3%	0%	0%	0%	0%	3%	6%	3%	1%	4%
Managing the pressure of water in your taps & the number of unplanned interruptions	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	1%	0%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	9%	10%	8%	0%	6%	19%	0%	16%	7%	6%	6%	9%	0%	9%	3%	7%	12%	11%	21%	8%	6%
Avoid the risk of homes & gardens being flooded with sewerage	3%	3%	3%	0%	1%	8%	0%	8%	2%	0%	10%	1%	0%	3%	0%	0%	7%	4%	13%	1%	1%
Managing the amount of water taken from the environment to supply customers	2%	2%	2%	0%	0%	3%	3%	5%	1%	0%	2%	2%	0%	5%	0%	0%	0%	2%	0%	0%	4%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	6%	9%	3%	0%	10%	5%	3%	14%	3%	2%	3%	7%	0%	8%	0%	12%	17%	2%	2%	4%	9%
No of respondents	218	107	111	10	74	79	52	64	84	71	47	163	6	47	25	27	25	93	41	68	108

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	10%	9%	11%	14%	11%	12%	5%	8%	11%	10%	15%	9%	0%	10%	12%	14%	13%	7%	13%	3%	13%
Bills show one big change in first year	7%	6%	7%	14%	7%	8%	4%	9%	7%	4%	9%	6%	0%	3%	9%	7%	11%	6%	4%	6%	8%
Bills change steadily every year	84%	85%	82%	72%	83%	80%	91%	83%	82%	86%	76%	85%	100%	86%	79%	79%	76%	87%	83%	92%	79%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	211	101	109	10	71	75	52	60	82	69	46	157	6	46	25	25	23	91	39	67	104

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£3)	Maintain current service (£0)	Maintain current service (£0)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£63)	Maintain current service (£51)	Maintain current service (£51)
	3. Ensuring the safety of tap water	Treatment works continue to meet current and future standards and no improvements other than maintenance required.Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£2)	Meet current and future standards at 3 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required.13,041 of water company lead pipes replaced to meet new lead standard (£23)	Meet current and future standards at 3 treatment works . Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 13,041 of water company lead pipes replaced to meet new lead standard (£23)
	4. Managing the appearance, taste and smell of tap water	Ensure no increase in the level of customer complaints regarding the appearance, taste and smell of tap water (£0)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£0)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£0)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (Less than £1)	Maintain current service (£2)	Maintain current service (£2)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works.Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 502 to 293. Reduce the number of properties externally flooding from sewers by 449 (£9)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	50 Km of rivers can better support fish and rare wildlife (£1)	Maintain current service (£1)	Maintain current service (£1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	180 Km of rivers can better support fish, 135 Km of rivers and 80Km2 of coastal waters can support rare wildlife, 1 lakes improved can support rare wildlife. (£43)	237 Km of rivers can better support fish, 179 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lake are improved and can support rare wildlife. (£57)	569 Km of rivers can better support fish, 205 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lakes are improved and can support rare wildlife. (£89)
		Overall cost, taking account of cost savings, on average bill by 2010 is £128 (excluding inflation). Overall bill by 2010 is £435 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £130 (plus inflation).Overall bill by 2010 is £437 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £160 (plus inflation). Overall bill by 2010 is £467 (plus inflation)

mid kent water

1. Key Findings

Mid Kent Water is a water supply only company providing water only services to a population of 569,000 customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £84
Reference Plan A – £79
Reference Plan B - £109

☐ 67% of customers stated that they are satisfied with the service provided, whilst 18% reported that they were dissatisfied. 55% of customers regard the service as fairly good value for money or better; 19% regard the service as fairly poor value for money or worse.

☐ 74-93% of customers wish for services to be maintained at the current level, and generally 80% of more would like the service to be improved. Customers thought it most important to maintain the 'safety of tap water levels' (93%), 'ensure a reliable and continuous water supply' and 'manage the appearance taste and smell of tap water' (both 91%). Lower priority was given to 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' (74%). Customers thought it most important for improvements to the 'management of the appearance taste and smell of tap water' (87%) and 'avoiding the risk of homes and gardens being flooding with sewage' (87%) to be introduced by 2010. Least importance was attached to 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' (78%).

☐ The Company Preferred Plan has the same level of approval as Reference Plans A and B (where all plans propose a combination of maintained and improved services). Across all three plans the proposal with the highest customer approval (73%-78%) was that to 'ensure the safety of tap water'. Other priorities within the plans were 'maintaining water pipes. treatment works and reservoirs' (66%-69%), 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (65%-69%) 'ensuring a reliable and continuous water supply' (63% to 68%) and 'managing the appearance taste and smell of tap water' (62% to 68%). 'Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' was ranked as the lowest priority within each plan, with customer support ranging from 40% for Reference Plan B, 44% for Reference Plan A and 51% for the Company Preferred Plan.

☐ When asked to identify service areas where they would like to see further improvements to those noted in the plans, 58% said ‘none’. Of those who would like to see improvements, measures to 'avoid the risk of homes and gardens being flooded sewage' (18%), 'maintain of water pipes, treatment works and reservoirs' and 'manage the pressure of water in taps and the number of unplanned interruptions' (both 11%) were rated highest.

☐ 44% of customers regarded the Company Preferred Plan as good value for money, compared to 39% for Reference Plan A and 28% for Reference Plan B. 37% regarded the Company Preferred Plan as poor value for money, with Reference Plans A and B scoring 37% and 56%, respectively.

☐ Customers were equally willing (53%) to pay for the Company Preferred Plan and Reference Plan A (43% probably willing, 10% definitely willing). Fewer customers were willing to pay for Reference Plan B (33% probably willing, 7% definitely willing). The proportion of customers that were 'not willing to pay' ranged from 38% for the Company Preferred Plan (26% probably not willing, 12% definitely not willing) and Reference Plan A (29% probably not willing, 9% definitely not willing) to 50% for Reference Plan B (22% probably not willing, 28% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (61% Company Preferred Plan, 64% Reference Plan A and 71% Reference Plan B). Between 9% and 10% of all Mid Kent customers indicated that they could not afford the bill increases set out in the proposed company plans (10% for the Company Preferred Plan and Reference Plan B and 9% for Reference Plan A).

☐ 48% of customers said they would not be concerned if some improvements had to be delayed until after 2010, with 42% saying that they would be concerned. Of those concerned, 15% would be concerned about delays to 'ensuring the safety of tap water' and 14% about delays in measures to 'avoid the risk of homes and gardens being flooded with sewage'. 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs.

☐ 84% of Mid Kent Water customers indicated that their preferred bill option for the period 2005 to 2010 is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £4/annum), 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£3/annum).and 'managing the appearance, taste and smell of tap water' (£5/annum).

2. Introduction

The attitudes and preferences of Mid Kent Water customers, reported in section 3, are based on a sample of 199 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.89% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 1,582 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	113 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	507 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	5 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	83% of rivers are of good, 10% fair and 7% poor quality.99% of designated bathing waters meet minimum standards and 76% meet higher standards. 58% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £286 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	2%	0%	4%	0%	4%	2%	0%	0%	1%	7%	0%	3%	0%	0%	0%	0%	0%	4%	5%	0%	0%
Very dissatisfied	6%	9%	3%	0%	5%	8%	4%	6%	7%	4%	15%	4%	0%	0%	13%	3%	9%	6%	7%	6%	0%
Fairly dissatisfied	10%	11%	10%	0%	6%	11%	18%	11%	11%	9%	7%	12%	0%	7%	4%	14%	2%	14%	18%	6%	3%
Neither satisfied nor dissatisfied	14%	16%	12%	0%	22%	7%	10%	21%	8%	13%	5%	16%	0%	10%	9%	28%	24%	8%	14%	11%	31%
Fairly satisfied	38%	39%	37%	100%	33%	46%	29%	40%	40%	32%	40%	38%	0%	45%	25%	32%	45%	38%	31%	42%	48%
Very satisfied	27%	21%	32%	0%	26%	23%	37%	18%	34%	28%	28%	26%	0%	23%	48%	23%	17%	28%	24%	32%	13%
Extremely satisfied	2%	4%	0%	0%	2%	2%	2%	3%	0%	4%	4%	1%	0%	7%	0%	0%	0%	2%	0%	3%	5%
Dont know/cant say	1%	1%	1%	0%	2%	1%	0%	1%	0%	3%	0%	1%	0%	8%	0%	0%	2%	0%	1%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158	0	18	17	26	32	105	82	101	16

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value for money	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very poor value	4%	5%	4%	0%	3%	6%	4%	1%	6%	6%	10%	3%	0%	0%	13%	0%	4%	5%	5%	5%	0%
Fairly poor value	15%	18%	12%	0%	22%	12%	8%	15%	16%	13%	23%	13%	0%	7%	8%	17%	15%	17%	14%	15%	19%
Neither poor nor good value	17%	13%	21%	0%	19%	12%	23%	18%	19%	12%	8%	19%	0%	13%	11%	21%	36%	12%	14%	14%	47%
Fairly good value	42%	47%	37%	100%	33%	50%	42%	49%	41%	34%	41%	42%	0%	33%	45%	43%	35%	45%	44%	42%	29%
Very good value	12%	11%	13%	0%	6%	15%	17%	11%	11%	15%	18%	10%	0%	25%	19%	19%	8%	8%	3%	20%	6%
Extremely good value	1%	1%	0%	0%	2%	0%	0%	0%	0%	3%	0%	1%	0%	7%	0%	0%	0%	0%	0%	1%	0%
Dont know/cant say	9%	6%	13%	0%	16%	5%	6%	5%	7%	18%	1%	12%	0%	15%	4%	0%	3%	14%	20%	3%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158	0	18	17	26	32	105	82	101	16

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	86%	88%	83%	100%	91%	81%	84%	90%	84%	83%	66%	90%	0%	87%	91%	88%	85%	84%	90%	80%	100%
Ensuring a reliable & continuous water supply	91%	94%	88%	100%	94%	85%	95%	96%	87%	91%	77%	95%	0%	90%	95%	91%	83%	93%	99%	83%	100%
Ensuring the safety of tap water	93%	95%	91%	100%	98%	87%	94%	96%	92%	91%	88%	94%	0%	90%	95%	91%	89%	95%	98%	88%	100%
Managing the appearance, taste & smell of tap water	91%	93%	89%	100%	96%	85%	94%	94%	89%	91%	80%	94%	0%	90%	92%	82%	85%	95%	96%	86%	100%
Managing the pressure of water in your taps & the number of unplanned interruptions	88%	89%	86%	100%	91%	83%	89%	95%	84%	83%	68%	92%	0%	85%	82%	90%	82%	90%	97%	83%	68%
Handling customers' accounts, queries, complaints & customers with special needs	87%	92%	82%	100%	86%	86%	90%	98%	79%	84%	80%	88%	0%	85%	77%	82%	84%	91%	92%	86%	71%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	86%	89%	82%	100%	91%	79%	87%	91%	86%	79%	66%	91%	0%	82%	92%	89%	84%	85%	94%	82%	71%
Avoid the risk of homes & gardens being flooded with sewerage	87%	91%	82%	100%	92%	82%	83%	87%	85%	88%	62%	92%	0%	90%	95%	86%	83%	86%	91%	81%	100%
Managing the amount of water taken from the environment to supply customers	78%	81%	76%	100%	82%	75%	76%	85%	77%	72%	50%	85%	0%	82%	85%	81%	83%	75%	86%	74%	71%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	74%	80%	69%	100%	82%	67%	72%	85%	66%	72%	54%	79%	0%	85%	81%	85%	81%	67%	78%	72%	69%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158	0	18	17	26	32	105	82	101	16

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	84%	87%	82%	100%	81%	86%	89%	87%	83%	83%	91%	83%	0%	67%	64%	75%	79%	95%	93%	80%	69%
Ensuring a reliable & continuous water supply	84%	86%	82%	100%	80%	86%	87%	87%	81%	83%	88%	82%	0%	77%	65%	77%	79%	91%	95%	79%	59%
Ensuring the safety of tap water	85%	88%	82%	100%	84%	85%	87%	87%	81%	87%	96%	82%	0%	77%	61%	75%	84%	93%	94%	79%	78%
Managing the appearance, taste & smell of tap water	87%	89%	84%	100%	86%	84%	93%	86%	85%	90%	91%	85%	0%	73%	74%	72%	80%	96%	93%	82%	83%
Managing the pressure of water in your taps & the number of unplanned interruptions	82%	84%	80%	100%	81%	82%	83%	83%	82%	81%	87%	81%	0%	77%	58%	77%	79%	89%	93%	78%	57%
Handling customers' accounts, queries, complaints & customers with special needs	80%	85%	76%	100%	79%	81%	83%	86%	76%	80%	90%	78%	0%	67%	57%	75%	79%	89%	88%	78%	59%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	84%	83%	85%	100%	83%	82%	87%	81%	85%	85%	86%	83%	0%	77%	66%	80%	79%	90%	94%	78%	63%
Avoid the risk of homes & gardens being flooded with sewerage	87%	86%	87%	100%	86%	85%	89%	88%	86%	85%	90%	86%	0%	77%	69%	80%	84%	93%	95%	80%	83%
Managing the amount of water taken from the environment to supply customers	82%	84%	80%	100%	78%	86%	82%	85%	79%	82%	85%	81%	0%	67%	57%	79%	79%	90%	90%	80%	52%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	78%	82%	74%	100%	74%	80%	81%	86%	71%	78%	87%	76%	0%	70%	61%	75%	79%	83%	84%	77%	52%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158	0	18	17	26	32	105	82	101	16

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	0	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	69%	66%	72%	100%	68%	74%	61%	72%	71%	62%	73%	68%	0%	58%	57%	62%	66%	76%	66%	76%	44%
Ensuring a reliable & continuous water supply	68%	70%	65%	100%	71%	64%	66%	69%	63%	73%	61%	69%	0%	68%	54%	52%	73%	72%	63%	74%	44%
Ensuring the safety of tap water	78%	83%	74%	100%	74%	81%	81%	83%	77%	74%	84%	77%	0%	68%	65%	73%	70%	86%	81%	81%	47%
Managing the appearance, taste & smell of tap water	68%	67%	68%	100%	70%	65%	67%	68%	65%	73%	63%	69%	0%	65%	55%	59%	62%	75%	67%	75%	29%
Managing the pressure of water in your taps & the number of unplanned interruptions	64%	65%	62%	100%	66%	65%	55%	67%	61%	63%	59%	65%	0%	75%	52%	57%	57%	67%	57%	75%	25%
Handling customers' accounts, queries, complaints & customers with special needs	54%	51%	58%	100%	55%	56%	48%	56%	52%	56%	52%	55%	0%	65%	47%	63%	44%	55%	39%	72%	22%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	69%	72%	65%	100%	67%	71%	65%	69%	66%	72%	77%	66%	0%	72%	69%	73%	57%	70%	60%	81%	32%
Avoid the risk of homes & gardens being flooded with sewerage	64%	63%	66%	100%	72%	61%	54%	56%	67%	72%	56%	66%	0%	65%	66%	67%	61%	64%	56%	75%	40%
Managing the amount of water taken from the environment to supply customers	53%	48%	58%	0%	56%	53%	51%	57%	50%	54%	56%	52%	0%	50%	45%	51%	56%	55%	47%	63%	26%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	51%	48%	54%	0%	56%	51%	43%	53%	46%	56%	58%	49%	0%	58%	42%	42%	51%	54%	45%	60%	26%
No of respondents	198	98	100	1	80	78	39	68	78	52	40	157	DK	18	17	26	32	105	81	101	16

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	68%	68%	69%	100%	62%	75%	69%	76%	69%	57%	73%	67%	0%	53%	50%	70%	63%	76%	65%	75%	44%
Ensuring a reliable & continuous water supply	66%	65%	67%	100%	69%	63%	62%	67%	66%	64%	61%	67%	0%	60%	57%	51%	72%	70%	56%	76%	51%
Ensuring the safety of tap water	77%	79%	75%	100%	73%	78%	81%	83%	76%	70%	78%	76%	0%	68%	53%	74%	74%	84%	78%	80%	47%
Managing the appearance, taste & smell of tap water	62%	66%	59%	100%	61%	65%	57%	65%	63%	59%	70%	60%	0%	58%	43%	48%	75%	66%	55%	72%	37%
Managing the pressure of water in your taps & the number of unplanned interruptions	61%	64%	58%	100%	59%	67%	52%	64%	63%	53%	63%	60%	0%	68%	45%	59%	61%	63%	48%	78%	22%
Handling customers' accounts, queries, complaints & customers with special needs	51%	48%	54%	100%	49%	55%	46%	51%	54%	47%	57%	49%	0%	58%	45%	49%	50%	51%	27%	73%	28%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	65%	67%	63%	100%	62%	73%	56%	66%	65%	64%	72%	63%	0%	58%	63%	67%	55%	69%	55%	79%	26%
Avoid the risk of homes & gardens being flooded with sewerage	61%	65%	58%	100%	65%	59%	55%	56%	60%	69%	59%	61%	0%	68%	59%	53%	56%	64%	51%	71%	47%
Managing the amount of water taken from the environment to supply customers	51%	51%	50%	0%	45%	58%	48%	53%	50%	48%	68%	46%	0%	50%	38%	50%	45%	54%	36%	66%	25%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	44%	45%	44%	0%	47%	48%	35%	40%	42%	54%	61%	40%	0%	58%	35%	26%	37%	51%	28%	58%	40%
No of respondents	197	98	99	1	80	77	39	68	77	52	38	157	0	18	17	26	32	103	80	101	16

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	0	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	66%	65%	67%	100%	58%	76%	63%	69%	70%	58%	76%	64%	0%	60%	55%	57%	63%	73%	59%	76%	44%
Ensuring a reliable & continuous water supply	63%	63%	62%	100%	61%	64%	62%	59%	65%	64%	65%	62%	0%	60%	57%	47%	66%	67%	51%	75%	44%
Ensuring the safety of tap water	73%	74%	71%	100%	71%	74%	72%	76%	73%	68%	79%	71%	0%	68%	53%	53%	74%	81%	71%	78%	44%
Managing the appearance, taste & smell of tap water	65%	69%	62%	100%	63%	68%	63%	69%	65%	61%	72%	63%	0%	58%	45%	55%	75%	69%	58%	76%	34%
Managing the pressure of water in your taps & the number of unplanned interruptions	57%	58%	56%	100%	53%	65%	48%	55%	63%	51%	59%	56%	0%	60%	43%	47%	50%	64%	42%	75%	22%
Handling customers' accounts, queries, complaints & customers with special needs	51%	50%	52%	100%	51%	56%	39%	52%	51%	49%	55%	49%	0%	65%	40%	54%	50%	49%	25%	75%	28%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	68%	72%	64%	100%	64%	73%	62%	66%	69%	69%	81%	64%	0%	58%	69%	79%	53%	71%	55%	80%	49%
Avoid the risk of homes & gardens being flooded with sewerage	62%	64%	60%	100%	68%	59%	53%	55%	63%	69%	59%	62%	0%	68%	63%	49%	65%	63%	54%	70%	51%
Managing the amount of water taken from the environment to supply customers	49%	49%	48%	0%	43%	55%	48%	48%	50%	48%	66%	44%	0%	43%	38%	50%	50%	50%	35%	62%	34%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	40%	39%	41%	0%	40%	44%	32%	35%	39%	47%	53%	36%	0%	50%	33%	26%	37%	43%	23%	55%	26%
No of respondents	197	98	99	1	80	77	39	68	77	52	38	157	DK	18	17	26	32	103	80	101	16

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	11%
Ensuring a reliable & continuous water supply	7%
Ensuring the safety of tap water	10%
Managing the appearance, taste & smell of tap water	9%
Managing the pressure of water in your taps & the number of unplanned interruptions	11%
Handling customers' accounts, queries, complaints & customers with special needs	3%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	10%
Avoid the risk of homes & gardens being flooded with sewerage	18%
Managing the amount of water taken from the environment to supply customers	7%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	5%
Upgrade water pipes	5%
(further) reduce limescale in water	1%
Introduce option of having a water meter	1%
Speed up process of repairs	3%
Reduce risk of floods	1%
Improve quality of pipe repair workmanship	1%
Increase number of water butts available	1%
No, none	58%
No of respondents	199

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	6%	4%	0%	5%	3%	9%	0%	8%	8%	9%	4%	0%	0%	3%	0%	0%	9%	6%	2%	16%
Very poor value	11%	11%	12%	0%	10%	15%	9%	8%	16%	9%	10%	12%	0%	3%	14%	7%	16%	12%	17%	3%	32%
Fairly poor value	21%	17%	25%	0%	18%	22%	25%	25%	19%	17%	29%	19%	0%	12%	7%	10%	24%	26%	21%	21%	19%
Neither poor nor good value	14%	19%	10%	0%	22%	9%	9%	14%	15%	14%	6%	17%	0%	17%	23%	24%	22%	8%	15%	15%	6%
Fairly good value	32%	34%	30%	100%	31%	34%	27%	40%	27%	29%	34%	32%	0%	35%	27%	30%	35%	32%	29%	35%	23%
Very good value	11%	10%	11%	0%	8%	13%	12%	10%	12%	10%	8%	11%	0%	12%	23%	28%	2%	7%	4%	18%	0%
Extremely good value	1%	1%	0%	0%	2%	0%	0%	0%	0%	3%	0%	1%	0%	7%	0%	0%	0%	0%	0%	1%	0%
Dont know/cant say	5%	3%	8%	0%	5%	3%	10%	2%	4%	11%	4%	5%	0%	13%	3%	0%	0%	7%	8%	3%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158	0	18	17	26	32	105	82	101	16

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	6%	4%	0%	5%	5%	7%	0%	9%	6%	9%	4%	0%	0%	3%	0%	4%	8%	5%	2%	24%
Very poor value	10%	9%	11%	0%	11%	10%	9%	9%	12%	9%	9%	10%	0%	0%	12%	11%	11%	10%	12%	5%	32%
Fairly poor value	22%	21%	23%	0%	14%	32%	21%	20%	23%	23%	28%	21%	0%	10%	20%	9%	22%	28%	28%	21%	0%
Neither poor nor good value	20%	20%	19%	0%	31%	7%	22%	21%	19%	19%	11%	22%	0%	22%	10%	25%	25%	17%	22%	18%	15%
Fairly good value	26%	28%	25%	100%	21%	31%	25%	33%	21%	26%	30%	26%	0%	38%	35%	29%	21%	24%	18%	33%	29%
Very good value	12%	13%	12%	0%	12%	14%	11%	15%	13%	9%	9%	12%	0%	15%	21%	25%	17%	6%	9%	17%	0%
Extremely good value	1%	1%	0%	0%	2%	0%	0%	0%	0%	3%	0%	1%	0%	7%	0%	0%	0%	0%	0%	1%	0%
Dont know/cant say	4%	2%	6%	0%	5%	2%	6%	2%	3%	7%	4%	4%	0%	8%	0%	0%	0%	6%	6%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158	0	18	17	26	32	105	82	101	16

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	15%	11%	18%	0%	14%	15%	14%	11%	22%	8%	16%	14%	0%	0%	15%	14%	11%	18%	19%	8%	32%
Very poor value	15%	12%	18%	0%	17%	7%	28%	18%	13%	14%	17%	15%	0%	15%	8%	17%	10%	17%	21%	10%	16%
Fairly poor value	26%	28%	24%	0%	24%	30%	21%	26%	19%	35%	37%	23%	0%	3%	24%	10%	32%	32%	34%	17%	34%
Neither poor nor good value	14%	17%	12%	0%	18%	12%	10%	18%	16%	7%	10%	15%	0%	26%	3%	19%	13%	13%	8%	19%	11%
Fairly good value	20%	23%	18%	100%	15%	25%	19%	22%	16%	25%	15%	22%	0%	34%	29%	31%	27%	12%	13%	29%	7%
Very good value	7%	6%	8%	0%	7%	9%	3%	3%	11%	7%	0%	8%	0%	8%	18%	9%	8%	4%	1%	13%	0%
Extremely good value	1%	1%	0%	0%	2%	0%	0%	0%	0%	3%	0%	1%	0%	7%	0%	0%	0%	0%	0%	1%	0%
Dont know/cant say	3%	3%	3%	0%	4%	1%	5%	3%	3%	3%	4%	3%	0%	8%	3%	0%	0%	4%	4%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158	0	18	17	26	32	105	82	101	16

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	0	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	13%	11%	0%	13%	8%	18%	5%	17%	15%	12%	0%	12%	0%	12%	3%	3%	19%	12%	9%	36%
Probably not willing to pay	26%	24%	28%	0%	22%	28%	31%	26%	29%	21%	33%	0%	24%	3%	18%	14%	33%	32%	36%	16%	32%
Probably willing to pay	43%	49%	37%	100%	48%	44%	30%	50%	37%	42%	34%	0%	46%	60%	57%	59%	56%	30%	36%	51%	32%
Definitely willing to pay	10%	8%	11%	0%	7%	12%	12%	7%	10%	13%	3%	0%	11%	22%	13%	24%	8%	4%	3%	17%	0%
Dont know/Cant say	9%	6%	12%	0%	10%	8%	10%	11%	6%	9%	17%	0%	7%	15%	0%	0%	0%	14%	12%	8%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	0	158	18	17	26	32	105	82	101	16

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	8%	6%	10%	0%	7%	12%	4%	0%	11%	12%	14%	6%	0%	0%	0%	33%	10%	7%	7%	13%	0%
Cost too much for improvement	61%	64%	58%	0%	67%	61%	53%	82%	50%	61%	60%	62%	0%	100%	42%	39%	78%	61%	72%	43%	63%
Cant afford it	28%	28%	27%	0%	25%	20%	42%	15%	35%	27%	26%	28%	0%	0%	58%	27%	6%	30%	19%	38%	37%
Dont know/Cant say	3%	2%	4%	0%	0%	8%	0%	3%	4%	0%	0%	4%	0%	0%	0%	0%	6%	3%	2%	6%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	75	36	39	0	28	27	20	20	36	18	18	57	0	0	5	4	12	53	39	25	11

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	DK	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	12%	6%	0%	9%	8%	13%	4%	12%	11%	10%	0%	9%	8%	12%	2%	0%	13%	6%	10%	18%
Probably not willing to pay	29%	24%	34%	0%	23%	31%	37%	25%	36%	22%	36%	0%	27%	5%	19%	15%	34%	36%	42%	17%	34%
Probably willing to pay	43%	52%	34%	100%	48%	45%	27%	52%	35%	42%	29%	0%	47%	49%	53%	62%	58%	31%	32%	51%	45%
Definitely willing to pay	10%	7%	12%	0%	7%	11%	13%	7%	10%	13%	9%	0%	9%	22%	13%	22%	8%	5%	6%	15%	0%
Dont know/Cant say	9%	5%	14%	0%	13%	6%	10%	11%	6%	11%	16%	0%	8%	15%	3%	0%	0%	15%	13%	7%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	0	158	18	17	26	32	105	82	101	16

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	0	25-44	45-64	65+	AB	C	DE	Yes	No	0	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	9%	9%	8%	0%	10%	11%	4%	0%	15%	5%	27%	3%	0%	0%	0%	17%	11%	9%	2%	17%	15%
Cost too much for improvement	64%	62%	65%	0%	77%	65%	46%	79%	57%	62%	59%	65%	0%	58%	36%	73%	82%	62%	78%	50%	41%
Cant afford it	22%	19%	25%	0%	13%	10%	50%	16%	26%	20%	14%	25%	0%	0%	64%	11%	7%	23%	20%	19%	44%
Dont know/Cant say	5%	9%	2%	0%	0%	14%	0%	5%	2%	13%	0%	7%	0%	42%	0%	0%	0%	6%	0%	15%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	74	35	39	0	25	29	20	19	38	17	18	56	0	2	5	4	11	51	39	27	8

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	DK	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	28%	29%	27%	0%	26%	28%	32%	28%	29%	26%	21%	0%	30%	21%	27%	24%	20%	33%	30%	25%	39%
Probably not willing to pay	22%	18%	26%	0%	23%	20%	28%	23%	24%	19%	41%	0%	18%	0%	7%	11%	19%	32%	36%	10%	27%
Probably willing to pay	33%	39%	27%	100%	34%	38%	21%	38%	32%	29%	19%	0%	37%	52%	53%	53%	58%	15%	23%	42%	31%
Definitely willing to pay	7%	4%	9%	0%	6%	7%	8%	0%	8%	13%	2%	0%	7%	20%	11%	13%	2%	3%	0%	13%	0%
Dont know/Cant say	10%	10%	10%	0%	12%	7%	11%	11%	6%	13%	17%	0%	8%	8%	3%	0%	0%	17%	10%	10%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	0	158	18	17	26	32	105	82	101	16

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	8%	8%	8%	0%	5%	14%	4%	5%	9%	9%	17%	5%	0%	0%	0%	16%	10%	8%	5%	14%	0%
Cost too much for improvement	71%	76%	66%	0%	77%	70%	62%	81%	64%	67%	67%	72%	0%	64%	41%	79%	85%	70%	78%	61%	68%
Cant afford it	20%	15%	24%	0%	15%	14%	35%	11%	25%	23%	16%	21%	0%	36%	59%	5%	6%	20%	15%	23%	32%
Dont know/Cant say	2%	0%	3%	0%	3%	2%	0%	3%	2%	0%	0%	2%	0%	0%	0%	0%	0%	3%	2%	2%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	99	46	53	0	39	36	24	34	41	23	24	75	0	4	6	9	13	68	53	35	11

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	20%	23%	17%	0%	19%	18%	25%	25%	13%	23%	14%	21%	0%	15%	15%	29%	20%	19%	20%	21%	13%
Not very concerned	28%	30%	26%	100%	26%	27%	32%	23%	37%	21%	21%	30%	0%	45%	49%	30%	35%	19%	25%	30%	30%
Fairly concerned	33%	28%	37%	0%	39%	32%	22%	30%	32%	38%	31%	33%	0%	8%	34%	25%	40%	36%	44%	24%	29%
Very concerned	9%	8%	9%	0%	7%	10%	10%	9%	9%	8%	22%	5%	0%	5%	0%	3%	0%	15%	8%	6%	25%
Dont know/cant say	11%	11%	11%	0%	10%	12%	11%	13%	9%	11%	12%	11%	0%	27%	3%	13%	5%	11%	3%	19%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	198	99	99	1	80	77	40	68	78	52	40	157	0	18	17	25	32	105	82	100	16

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	6%	4%	8%	0%	1%	12%	6%	12%	5%	0%	6%	6%	0%	5%	0%	2%	8%	8%	9%	5%	0%
Ensuring a reliable & continuous water supply	8%	5%	11%	0%	8%	9%	8%	10%	7%	7%	10%	8%	0%	3%	3%	5%	11%	10%	8%	10%	0%
Ensuring the safety of tap water	15%	13%	16%	0%	15%	17%	10%	16%	14%	14%	15%	15%	0%	5%	3%	9%	14%	20%	19%	12%	5%
Managing the appearance, taste & smell of tap water	6%	5%	7%	0%	7%	7%	4%	3%	7%	10%	4%	7%	0%	0%	0%	11%	3%	8%	10%	3%	5%
Managing the pressure of water in your taps & the number of unplanned interruptions	3%	1%	4%	0%	6%	1%	0%	1%	4%	3%	0%	4%	0%	0%	0%	8%	4%	2%	5%	2%	0%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	6%	5%	7%	0%	6%	8%	5%	5%	10%	2%	6%	6%	0%	5%	3%	5%	2%	8%	9%	4%	0%
Avoid the risk of homes & gardens being flooded with sewerage	14%	14%	14%	0%	14%	13%	17%	10%	12%	23%	13%	15%	0%	8%	24%	0%	20%	16%	18%	8%	32%
Managing the amount of water taken from the environment to supply customers	2%	2%	2%	0%	2%	3%	0%	5%	0%	0%	0%	2%	0%	0%	0%	0%	0%	4%	5%	0%	0%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	6%	6%	5%	0%	9%	5%	0%	9%	0%	9%	3%	6%	0%	0%	0%	0%	7%	8%	7%	5%	0%
No of respondents	199	99	100	1	80	78	40	69	78	52	40	158		18	17	26	32	105	82	101	16

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	9%	9%	8%	0%	3%	15%	8%	15%	5%	6%	10%	8%	0%	0%	4%	7%	18%	8%	14%	6%	0%
Bills show one big change in first year	8%	8%	7%	0%	6%	8%	10%	7%	7%	9%	7%	8%	0%	22%	10%	5%	8%	5%	6%	10%	3%
Bills change steadily every year	84%	83%	85%	100%	91%	78%	82%	78%	88%	85%	83%	84%	0%	78%	86%	88%	74%	86%	81%	85%	97%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
	198	97	100	1	80	77	40	69	77	52	38	158	0	18	17	26	32	104	82	100	16

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£35)	Maintain current service (£32)	Maintain current service (£32)
	3. Ensuring the safety of tap water	Meet current and future standards at 4 of treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required.135 of water company lead pipes replaced to meet new lead standard (£4)	Meet current and future standards at 4 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required.135 of water company lead pipes replaced to meet new lead standards (£4)	Meet current and future standards at 4 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required.135 of water company lead pipes replaced to meet new lead standards (£4)
	4. Managing the appearance, taste and smell of tap water	46% fewer customer complaints about the appearance, taste or smell of tap water (£5)	46% fewer customer complaints about the appearance, taste or smell of tap water (£5)	46% fewer customer complaints about the appearance, taste or smell of tap water (£5)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£3)	Maintain current service (£3)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 502 to 293. Reduce the number of properties externally flooding from sewers by 449 (£9)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£1)	Maintain current service (£1)	Maintain current service (£1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	180 Km of rivers can better support fish,135 Km of rivers and 80Km2 of coastal waters can support rare wildlife, 1 lakes are improved can support rare wildlife. (£43)	237 Km of rivers can better support fish, 179 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lake are improved and can support rare wildlife. (£57)	569 Km of rivers can better support fish, 205 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lakes are improved and can support rare wildlife. (£89)
		Overall cost on average bill taking account of cost savings by 2010 is £84 (excluding inflation).Overall bill by 2010 is £370 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £79 (plus inflation). Overall bill by 2010 is £364 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £109 (plus inflation). Overall bill by 2010 is £395 (plus inflation)

1. Key Findings

Portsmouth Water is a water supply only company providing water services to a population of 658,000 customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan – £68
Reference Plan A – £68
Reference Plan B – £98

☐ 77% of customers stated that they are satisfied with the current service provided by Portsmouth Water, whilst 10% said they are dissatisfied. 55% regard the service as good value for money, whilst 15% regard the service as poor value for money.

☐ 82-93% of customers wish for services to be maintained at the current level and generally three quarters of the customers feel that it is important to introduce improvements to all services. Customers thought it most important to maintain a 'reliable and continuous water supply' and the 'safety of tap water' (both 93%). Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs' (82%). Customers thought it most important for improvements to the 'safety of tap water' (81%) and the 'the appearance taste and smell of tap water' (80%) to be introduced by 2010. Least importance was attached to improvements in 'handling customer accounts, queries complaints and customers with special needs' (59%).

☐ The Company Preferred Plan has a higher level of approval than Reference Plan A or B (where each plan proposed a combination of maintained and improved services). Reference Plan A and B have similar approval levels. Across the three plans, customers most wanted to see proposed outputs for 'ensuring the safety of tap water' (67% to 71%). Following, they would most like to see proposals for 'managing the appearance, taste and smell of tap water' (61% to 66%) and those to 'ensure a reliable and continuous water supply' (58% to 67%). 'Handling customers accounts, queries, complaints and customers with special needs' was ranked as the lowest priority within each plan, with customer support ranging from 31% for Reference Plan B, 37% for Reference Plan A and 46% for the Company Preferred Plan.

☐ When asked to identify service areas where they would like to see further improvements to those noted in the plans, 66% said 'none'.

☐ Approximately the same proportion of customers regarded the Company Preferred Plan and Reference Plan A as good value for money (51% and 49% respectively) and poor value for money (25% and 27% respectively). 23% of customers rated Reference Plan B good value for money and 45% rated it poor value for money.

☐ Customers were almost equally willing to pay for the Company Preferred Plan (62%- 53% probably willing, 9% definitely willing) and Reference Plan A (59%- 52% probably willing, 7% definitely willing) and less willing to pay for the proposed changes in Reference Plan B (39%-35% probably willing, 4% definitely willing). The proportion of customers 'not willing to pay' ranged from 30% for the Company Preferred Plan (20% probably not willing, 10% definitely not willing), 35% for Reference Plan A (22% probably not willing, 13% definitely not willing) and 55% for Reference Plan B (29% probably not willing, 26% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (53% Company Preferred Plan, 67% Reference Plan A and 70% Reference Plan B). Between 10% and 14% of all Portsmouth Water customers indicated that they could not afford the bill increases set out in the proposed company plans (10% for Reference Plan A, 13% for the Company Preferred Plan and 14% for Reference Plan B).

☐ 62% of customers said they would be concerned if some improvements had to be delayed until after 2010, and 31% would not be concerned. Of those concerned, 27% would be so for delays to 'ensuring the safety of tap water'. 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 86% of Portsmouth Water customers indicated that their preferred bill option for the period 2005 to 2010 is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three improvements customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £9-£10/annum), 'managing the appearance, taste and smell of tap water' (£3/annum), and 'avoiding the risk of homes and gardens being flooded with sewage' (£8-£9/annum).

2. Introduction

The attitudes and preferences of Portsmouth Water customers, reported in section 3, are based are based on a sample of 202 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in fifty years
	3. Ensuring the safety of tap water	99.92% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 251 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	120 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.5% of billing enquiries answered within 5 days and 99% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	507 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	4 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	83% of rivers are of good, 10% fair and 7% poor quality. 99% of designated bathing waters meet minimum standards and 76% meet higher standards. 58% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £233 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	1%
Very dissatisfied	4%	3%	4%	7%	5%	4%	0%	4%	2%	5%	15%	3%	0%	5%	4%	3%	4%	0%	0%	2%	7%
Fairly dissatisfied	6%	8%	5%	6%	5%	4%	12%	7%	6%	7%	8%	6%	32%	2%	12%	0%	3%	13%	0%	8%	7%
Neither satisfied nor dissatisfied	11%	7%	16%	0%	13%	9%	15%	7%	14%	13%	0%	12%	34%	17%	11%	0%	8%	21%	8%	16%	8%
Fairly satisfied	37%	40%	34%	67%	40%	32%	31%	47%	30%	34%	31%	38%	0%	30%	36%	30%	48%	32%	18%	33%	48%
Very satisfied	35%	38%	32%	13%	32%	45%	33%	32%	41%	31%	31%	36%	0%	35%	26%	63%	35%	27%	63%	35%	24%
Extremely satisfied	5%	4%	5%	7%	4%	5%	4%	3%	3%	8%	15%	4%	0%	5%	8%	0%	1%	8%	8%	4%	4%
Dont know/cant say	2%	0%	3%	0%	2%	1%	2%	0%	3%	1%	0%	1%	34%	3%	3%	3%	0%	0%	3%	2%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	1%	1%	1%	0%	1%	1%	1%	0%	1%	3%	0%	1%	0%	5%	0%	0%	1%	0%	0%	0%	3%
Very poor value	4%	5%	4%	0%	3%	4%	9%	3%	3%	8%	8%	4%	0%	2%	9%	3%	0%	8%	0%	7%	3%
Fairly poor value	10%	10%	11%	13%	11%	10%	8%	4%	14%	13%	8%	10%	34%	18%	14%	9%	9%	2%	12%	12%	8%
Neither poor nor good value	22%	25%	20%	6%	24%	26%	19%	22%	27%	17%	0%	24%	0%	17%	20%	16%	22%	35%	15%	25%	23%
Fairly good value	39%	39%	38%	46%	35%	50%	29%	53%	30%	33%	32%	39%	32%	35%	36%	49%	50%	20%	45%	35%	42%
Very good value	15%	15%	15%	7%	18%	6%	23%	18%	12%	15%	30%	14%	0%	10%	15%	17%	16%	16%	8%	15%	15%
Extremely good value	1%	1%	1%	0%	2%	0%	1%	0%	0%	4%	7%	1%	0%	5%	2%	0%	0%	0%	0%	1%	2%
Dont know/cant say	7%	5%	9%	28%	6%	3%	9%	0%	13%	7%	15%	6%	34%	8%	5%	6%	1%	19%	20%	4%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	90%	90%	90%	100%	87%	93%	91%	93%	89%	89%	92%	90%	100%	85%	95%	88%	92%	88%	100%	92%	85%
Ensuring a reliable & continuous water supply	93%	91%	94%	100%	91%	95%	91%	93%	93%	92%	92%	93%	100%	88%	98%	88%	93%	92%	100%	93%	90%
Ensuring the safety of tap water	93%	93%	94%	100%	92%	98%	89%	93%	93%	95%	92%	93%	100%	90%	99%	90%	94%	90%	97%	95%	91%
Managing the appearance, taste & smell of tap water	90%	87%	93%	100%	88%	91%	91%	89%	89%	94%	92%	90%	100%	93%	99%	90%	85%	85%	97%	92%	85%
Managing the pressure of water in your taps & the number of unplanned interruptions	86%	83%	89%	86%	81%	91%	88%	89%	81%	90%	92%	85%	100%	80%	94%	88%	85%	81%	100%	90%	76%
Handling customers' accounts, queries, complaints & customers with special needs	82%	79%	85%	86%	77%	87%	83%	89%	76%	82%	92%	81%	100%	70%	87%	88%	83%	79%	92%	89%	71%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	88%	84%	93%	100%	85%	91%	88%	89%	87%	90%	92%	88%	100%	88%	95%	90%	85%	83%	98%	90%	82%
Avoid the risk of homes & gardens being flooded with sewerage	90%	85%	94%	100%	88%	91%	89%	89%	89%	92%	92%	90%	100%	85%	97%	90%	87%	87%	97%	90%	86%
Managing the amount of water taken from the environment to supply customers	84%	81%	88%	93%	80%	91%	82%	86%	84%	83%	92%	84%	66%	78%	97%	90%	83%	71%	92%	89%	79%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	88%	85%	91%	100%	88%	91%	83%	93%	84%	90%	92%	88%	66%	83%	97%	87%	94%	73%	97%	89%	87%
No of respondents	201	99	102	12	81	61	48	67	79	55	10	189	2	30	49	27	59	37	28	90	82

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	73%	73%	73%	59%	66%	82%	77%	71%	72%	78%	62%	74%	66%	68%	77%	84%	67%	75%	86%	80%	60%
Ensuring a reliable & continuous water supply	76%	80%	73%	79%	70%	82%	80%	81%	71%	78%	85%	76%	66%	70%	82%	82%	71%	79%	80%	82%	68%
Ensuring the safety of tap water	81%	82%	79%	93%	77%	86%	77%	86%	74%	83%	85%	81%	32%	73%	83%	87%	80%	80%	94%	82%	74%
Managing the appearance, taste & smell of tap water	80%	81%	79%	85%	75%	87%	78%	78%	80%	82%	92%	80%	66%	90%	82%	84%	75%	75%	84%	81%	76%
Managing the pressure of water in your taps & the number of unplanned interruptions	72%	69%	75%	80%	67%	72%	80%	71%	71%	75%	85%	72%	66%	62%	85%	82%	58%	80%	74%	80%	62%
Handling customers' accounts, queries, complaints & customers with special needs	59%	56%	63%	59%	52%	69%	59%	63%	58%	57%	85%	58%	66%	55%	66%	54%	54%	65%	40%	71%	52%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	72%	74%	70%	73%	66%	78%	74%	71%	70%	75%	85%	72%	32%	73%	76%	68%	70%	71%	60%	81%	66%
Avoid the risk of homes & gardens being flooded with sewerage	72%	69%	74%	81%	65%	78%	74%	70%	69%	77%	77%	72%	66%	70%	77%	69%	68%	73%	77%	75%	65%
Managing the amount of water taken from the environment to supply customers	68%	72%	64%	79%	66%	73%	63%	71%	66%	67%	78%	68%	32%	68%	73%	75%	66%	60%	52%	75%	68%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	67%	70%	65%	79%	69%	71%	58%	68%	66%	69%	78%	67%	32%	68%	70%	66%	70%	60%	52%	71%	71%
No of respondents	201	99	102	12	81	61	48	67	79	55	10	189	2	30	49	27	59	37	28	90	82

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	62%	65%	60%	32%	63%	70%	58%	71%	55%	61%	39%	63%	66%	52%	64%	69%	72%	48%	68%	67%	56%
Ensuring a reliable & continuous water supply	67%	64%	69%	53%	65%	71%	67%	74%	60%	66%	46%	68%	66%	52%	68%	75%	70%	65%	74%	73%	56%
Ensuring the safety of tap water	71%	72%	70%	40%	74%	78%	63%	83%	64%	66%	38%	73%	34%	57%	67%	81%	86%	55%	95%	77%	57%
Managing the appearance, taste & smell of tap water	66%	67%	65%	60%	61%	77%	62%	75%	62%	62%	54%	67%	66%	47%	65%	84%	75%	57%	92%	72%	53%
Managing the pressure of water in your taps & the number of unplanned interruptions	52%	50%	54%	39%	55%	53%	47%	54%	48%	54%	46%	52%	66%	47%	45%	67%	59%	41%	51%	59%	46%
Handling customers' accounts, queries, complaints & customers with special needs	46%	46%	46%	39%	46%	47%	47%	50%	43%	45%	38%	46%	66%	37%	41%	61%	52%	40%	51%	49%	43%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	56%	57%	56%	26%	59%	56%	60%	64%	50%	56%	38%	57%	34%	54%	56%	61%	63%	44%	53%	64%	51%
Avoid the risk of homes & gardens being flooded with sewerage	60%	60%	59%	54%	62%	54%	65%	62%	57%	60%	38%	61%	66%	50%	60%	69%	67%	48%	83%	69%	44%
Managing the amount of water taken from the environment to supply customers	53%	53%	52%	32%	54%	54%	54%	57%	54%	45%	46%	53%	34%	42%	52%	61%	63%	40%	56%	60%	44%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	51%	51%	51%	39%	61%	45%	46%	65%	49%	39%	31%	53%	34%	43%	40%	61%	72%	35%	54%	56%	47%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	54%	54%	53%	13%	45%	68%	60%	52%	53%	56%	31%	55%	66%	49%	56%	66%	46%	56%	62%	60%	42%
Ensuring a reliable & continuous water supply	58%	52%	63%	53%	47%	70%	61%	52%	59%	62%	46%	58%	66%	42%	62%	78%	49%	65%	74%	67%	41%
Ensuring the safety of tap water	69%	65%	72%	54%	69%	76%	63%	78%	63%	65%	54%	69%	66%	52%	69%	78%	78%	58%	90%	74%	55%
Managing the appearance, taste & smell of tap water	61%	58%	63%	54%	53%	71%	62%	71%	55%	55%	45%	61%	66%	45%	58%	75%	63%	61%	84%	67%	45%
Managing the pressure of water in your taps & the number of unplanned interruptions	47%	43%	52%	26%	40%	56%	53%	49%	45%	49%	46%	48%	34%	35%	48%	63%	44%	50%	47%	58%	35%
Handling customers' accounts, queries, complaints & customers with special needs	37%	34%	40%	20%	30%	39%	49%	42%	34%	36%	30%	37%	66%	24%	33%	48%	36%	46%	43%	43%	27%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	49%	48%	49%	13%	46%	53%	55%	49%	46%	52%	38%	49%	34%	45%	51%	60%	45%	46%	47%	57%	39%
Avoid the risk of homes & gardens being flooded with sewerage	54%	50%	57%	47%	52%	53%	59%	54%	48%	61%	38%	54%	66%	35%	52%	69%	61%	48%	78%	61%	36%
Managing the amount of water taken from the environment to supply customers	51%	51%	51%	20%	52%	54%	53%	64%	50%	37%	38%	52%	34%	43%	42%	57%	64%	44%	48%	59%	43%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	45%	44%	45%	20%	52%	43%	40%	57%	40%	36%	23%	46%	34%	40%	27%	57%	62%	35%	42%	50%	41%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	51%	54%	48%	19%	42%	66%	55%	53%	51%	49%	31%	52%	66%	35%	56%	60%	52%	50%	65%	58%	40%
Ensuring a reliable & continuous water supply	58%	58%	59%	34%	46%	69%	73%	60%	57%	59%	31%	60%	66%	35%	66%	75%	53%	64%	89%	67%	37%
Ensuring the safety of tap water	67%	65%	68%	47%	62%	79%	63%	78%	61%	61%	39%	68%	66%	45%	68%	78%	78%	56%	89%	73%	52%
Managing the appearance, taste & smell of tap water	59%	57%	61%	54%	51%	70%	60%	71%	54%	53%	38%	60%	66%	38%	62%	72%	63%	58%	84%	71%	38%
Managing the pressure of water in your taps & the number of unplanned interruptions	42%	43%	41%	13%	32%	53%	52%	45%	41%	40%	31%	43%	34%	28%	45%	60%	40%	39%	47%	53%	29%
Handling customers' accounts, queries, complaints & customers with special needs	31%	28%	34%	13%	25%	37%	38%	35%	30%	27%	23%	32%	34%	20%	28%	42%	33%	33%	36%	37%	24%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	50%	50%	49%	27%	46%	52%	58%	53%	47%	50%	47%	50%	66%	50%	54%	57%	49%	39%	50%	57%	41%
Avoid the risk of homes & gardens being flooded with sewerage	51%	50%	52%	47%	51%	50%	54%	47%	52%	54%	39%	51%	66%	33%	52%	72%	56%	42%	83%	60%	31%
Managing the amount of water taken from the environment to supply customers	38%	40%	37%	20%	39%	41%	38%	46%	41%	25%	15%	39%	34%	30%	27%	51%	50%	31%	45%	43%	32%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	39%	40%	37%	20%	42%	41%	34%	54%	38%	21%	8%	40%	34%	31%	22%	51%	55%	31%	42%	40%	37%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	2%
Ensuring a reliable & continuous water supply	1%
Ensuring the safety of tap water	7%
Managing the appearance, taste & smell of tap water	2%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%
Handling customers' accounts, queries, complaints & customers with special needs	7%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	2%
Avoid the risk of homes & gardens being flooded with sewerage	7%
Managing the amount of water taken from the environment to supply customers	7%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	1%
(further) reduce sewerage drainage problems	5%
Introduce option of having a water meter	2%
(further) reduce sewerage treatment works smells	1%
Reduce chemical treatments in water supply	1%
(further) improve cleanliness of the rivers	3%
Improve communication of water shutdown	1%
Keep reserves of water	1%
No, none	66%
No of respondents	202

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	3%	2%	0%	2%	1%	6%	3%	3%	1%	0%	3%	0%	2%	2%	3%	1%	6%	0%	3%	3%
Very poor value	4%	4%	4%	7%	3%	4%	6%	0%	6%	7%	15%	4%	0%	5%	11%	0%	0%	4%	11%	4%	2%
Fairly poor value	18%	21%	16%	7%	21%	14%	21%	25%	11%	20%	0%	19%	66%	17%	20%	22%	20%	12%	14%	20%	16%
Neither poor nor good value	19%	21%	17%	28%	17%	22%	17%	11%	24%	23%	24%	19%	0%	22%	25%	15%	8%	29%	23%	12%	26%
Fairly good value	41%	33%	49%	46%	46%	45%	26%	50%	39%	33%	54%	41%	0%	30%	34%	43%	55%	35%	43%	38%	45%
Very good value	9%	11%	6%	7%	8%	5%	14%	7%	9%	9%	7%	9%	0%	12%	8%	14%	9%	2%	0%	14%	6%
Extremely good value	1%	2%	0%	0%	0%	3%	0%	0%	2%	0%	0%	1%	0%	3%	0%	0%	1%	0%	0%	2%	0%
Dont know/cant say	5%	5%	6%	7%	3%	5%	10%	4%	6%	7%	0%	5%	34%	8%	2%	3%	4%	12%	9%	7%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	12	81	61	48	67	79	55	10	189	2	30	49	27	59	37	28	90	82

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	5%	3%	0%	3%	1%	9%	3%	5%	3%	0%	4%	0%	5%	3%	3%	1%	8%	3%	4%	4%
Very poor value	6%	7%	6%	0%	3%	11%	8%	3%	5%	12%	8%	6%	0%	13%	11%	3%	0%	8%	14%	8%	3%
Fairly poor value	17%	20%	13%	20%	15%	13%	23%	15%	14%	22%	0%	17%	66%	20%	27%	18%	11%	6%	11%	20%	16%
Neither poor nor good value	21%	20%	21%	21%	25%	19%	15%	14%	25%	21%	24%	21%	0%	17%	24%	18%	14%	31%	23%	15%	26%
Fairly good value	42%	35%	49%	39%	50%	48%	23%	57%	37%	32%	54%	42%	0%	25%	32%	43%	66%	33%	40%	38%	46%
Very good value	6%	8%	4%	20%	1%	4%	12%	3%	10%	3%	15%	5%	0%	15%	3%	12%	1%	4%	0%	9%	4%
Extremely good value	1%	1%	1%	0%	0%	1%	1%	0%	1%	1%	0%	1%	0%	2%	0%	0%	1%	0%	0%	2%	0%
Dont know/cant say	4%	4%	4%	0%	3%	2%	8%	4%	3%	5%	0%	4%	34%	3%	0%	3%	4%	10%	9%	4%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	12	81	61	48	67	79	55	10	189	2	30	49	27	59	37	28	90	82

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	12%	17%	7%	0%	11%	10%	20%	10%	11%	16%	0%	13%	0%	15%	19%	16%	1%	16%	17%	16%	7%
Very poor value	11%	11%	12%	0%	10%	16%	11%	4%	14%	17%	8%	11%	32%	12%	14%	6%	9%	17%	11%	13%	10%
Fairly poor value	22%	21%	23%	26%	24%	15%	28%	32%	14%	21%	31%	22%	34%	18%	31%	16%	26%	14%	26%	18%	23%
Neither poor nor good value	26%	22%	30%	7%	32%	35%	8%	36%	24%	16%	8%	27%	0%	15%	13%	30%	43%	21%	32%	17%	34%
Fairly good value	19%	22%	17%	46%	16%	19%	20%	14%	25%	18%	39%	19%	0%	30%	23%	18%	20%	6%	5%	23%	21%
Very good value	4%	4%	4%	7%	3%	1%	9%	3%	6%	3%	15%	4%	0%	5%	2%	11%	0%	8%	3%	7%	2%
Extremely good value	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%
Dont know/cant say	4%	1%	7%	15%	4%	2%	5%	0%	5%	8%	0%	4%	34%	5%	0%	3%	0%	17%	6%	5%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	12	81	61	48	67	79	55	10	189	2	30	49	27	59	37	28	90	82

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	10%	11%	9%	0%	8%	11%	17%	7%	13%	10%	8%	10%	34%	15%	11%	16%	1%	16%	8%	13%	8%
Probably not willing to pay	20%	21%	19%	6%	18%	18%	31%	17%	18%	26%	0%	21%	32%	13%	37%	12%	13%	20%	23%	25%	12%
Probably willing to pay	53%	47%	58%	66%	60%	57%	33%	68%	48%	41%	78%	52%	0%	48%	47%	41%	77%	34%	60%	43%	63%
Definitely willing to pay	9%	14%	4%	7%	8%	10%	11%	7%	10%	11%	7%	9%	0%	12%	4%	27%	9%	0%	3%	13%	7%
Dont know/Cant say	8%	6%	9%	21%	7%	5%	9%	0%	11%	12%	8%	7%	34%	12%	0%	3%	0%	30%	6%	7%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	12	82	60	48	67	78	56	10	189	2	30	50	26	59	37	27	90	82

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	4%	7%	0%	0%	0%	0%	10%	13%	0%	0%	0%	4%	0%	0%	0%	0%	0%	17%	0%	7%	0%
Cost too much for improvement	53%	51%	56%	100%	62%	63%	37%	44%	64%	48%	0%	54%	52%	57%	50%	44%	100%	34%	75%	44%	68%
Cant afford it	40%	37%	44%	0%	38%	32%	50%	42%	29%	52%	100%	39%	48%	43%	47%	45%	0%	50%	17%	49%	27%
Dont know/Cant say	3%	5%	0%	0%	0%	5%	3%	0%	7%	0%	0%	3%	0%	0%	3%	12%	0%	0%	9%	0%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	60	32	29	1	21	16	22	16	24	20	1	58	1	7	24	7	8	13	9	32	17

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	13%	17%	10%	7%	8%	14%	23%	10%	15%	14%	8%	13%	34%	22%	18%	6%	6%	16%	11%	15%	12%
Probably not willing to pay	22%	25%	20%	13%	23%	16%	30%	21%	18%	29%	8%	23%	32%	15%	36%	16%	16%	24%	17%	29%	14%
Probably willing to pay	52%	45%	58%	53%	60%	59%	28%	65%	49%	39%	70%	51%	0%	40%	43%	55%	74%	34%	64%	42%	59%
Definitely willing to pay	7%	8%	5%	13%	4%	6%	11%	3%	8%	8%	7%	7%	0%	12%	3%	20%	4%	0%	3%	9%	6%
Dont know/Cant say	6%	5%	7%	15%	6%	5%	8%	0%	9%	11%	8%	6%	34%	10%	0%	3%	0%	25%	6%	5%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	4%	5%	3%	0%	3%	0%	9%	10%	3%	0%	0%	4%	0%	0%	0%	0%	7%	15%	0%	8%	0%
Cost too much for improvement	67%	72%	59%	100%	75%	67%	55%	79%	70%	52%	52%	67%	52%	68%	64%	87%	93%	40%	72%	62%	79%
Cant afford it	27%	18%	38%	0%	18%	33%	34%	10%	24%	45%	48%	26%	48%	32%	33%	13%	0%	40%	18%	28%	21%
Dont know/Cant say	2%	4%	0%	0%	3%	0%	3%	0%	3%	3%	0%	2%	0%	0%	3%	0%	0%	5%	10%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	72	41	31	2	25	19	26	21	26	24	2	69	1	11	27	6	13	15	8	40	22

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	26%	31%	21%	7%	21%	27%	37%	18%	29%	31%	8%	26%	66%	28%	39%	25%	10%	32%	23%	33%	20%
Probably not willing to pay	29%	26%	31%	26%	32%	28%	25%	40%	24%	24%	23%	30%	0%	17%	34%	25%	39%	18%	34%	25%	29%
Probably willing to pay	35%	31%	39%	53%	41%	34%	23%	40%	36%	29%	62%	34%	0%	37%	24%	34%	51%	25%	35%	30%	42%
Definitely willing to pay	4%	6%	1%	0%	1%	5%	8%	3%	3%	5%	0%	4%	0%	8%	3%	14%	0%	0%	3%	7%	1%
Dont know/Cant say	6%	5%	7%	15%	6%	5%	8%	0%	9%	11%	8%	6%	34%	10%	0%	3%	0%	25%	6%	5%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	4%	7%	0%	0%	0%	5%	7%	6%	4%	0%	0%	4%	0%	0%	0%	0%	3%	18%	0%	4%	4%
Cost too much for improvement	70%	70%	69%	79%	78%	74%	51%	89%	60%	58%	52%	70%	52%	51%	67%	82%	94%	39%	81%	66%	73%
Cant afford it	25%	21%	30%	21%	20%	21%	39%	6%	31%	42%	48%	24%	48%	49%	29%	18%	3%	43%	14%	28%	23%
Dont know/Cant say	1%	1%	2%	0%	2%	0%	3%	0%	4%	0%	0%	2%	0%	0%	4%	0%	0%	0%	5%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	109	57	52	4	43	33	30	38	40	31	3	105	1	14	36	13	29	17	16	51	40

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	8%	10%	7%	0%	6%	9%	14%	7%	9%	9%	0%	9%	0%	5%	12%	0%	9%	12%	5%	10%	7%
Not very concerned	23%	27%	19%	40%	26%	21%	17%	22%	25%	22%	38%	22%	32%	27%	24%	28%	17%	23%	17%	20%	26%
Fairly concerned	45%	39%	51%	46%	46%	44%	43%	51%	40%	45%	54%	45%	0%	45%	47%	36%	55%	31%	54%	38%	50%
Very concerned	17%	20%	14%	0%	15%	24%	15%	20%	17%	13%	0%	18%	0%	16%	14%	30%	19%	11%	17%	24%	10%
Dont know/cant say	7%	4%	10%	15%	7%	2%	11%	0%	10%	11%	8%	6%	68%	7%	3%	6%	0%	23%	6%	8%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	6%	5%	8%	7%	8%	8%	1%	4%	8%	7%	8%	6%	0%	8%	5%	3%	11%	2%	0%	8%	7%
Ensuring a reliable & continuous water supply	10%	14%	7%	13%	4%	11%	19%	11%	9%	11%	8%	10%	0%	5%	15%	6%	12%	8%	24%	12%	4%
Ensuring the safety of tap water	27%	26%	28%	26%	27%	33%	21%	25%	23%	34%	15%	28%	0%	25%	39%	20%	30%	12%	26%	25%	30%
Managing the appearance, taste & smell of tap water	10%	7%	13%	13%	7%	9%	17%	17%	5%	9%	15%	10%	0%	5%	16%	11%	8%	8%	13%	10%	9%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%	3%	1%	0%	1%	0%	6%	3%	1%	1%	0%	2%	0%	3%	1%	8%	0%	0%	0%	3%	1%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	1%	7%	0%	0%	0%	0%	1%	0%	8%	0%	0%	0%	2%	0%	0%	0%	0%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	9%	6%	12%	7%	11%	10%	4%	11%	5%	12%	8%	9%	0%	15%	6%	3%	14%	4%	0%	9%	12%
Avoid the risk of homes & gardens being flooded with sewerage	3%	2%	4%	6%	3%	2%	3%	0%	3%	6%	0%	3%	0%	2%	6%	0%	3%	2%	0%	4%	3%
Managing the amount of water taken from the environment to supply customers	6%	8%	5%	0%	13%	1%	1%	11%	4%	3%	0%	7%	0%	2%	5%	3%	14%	0%	0%	1%	14%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	10%	14%	6%	0%	21%	1%	6%	26%	3%	1%	0%	11%	0%	0%	2%	3%	27%	8%	0%	3%	22%
No of respondents	202	99	103	12	82	61	48	67	79	56	10	190	2	30	50	27	59	37	28	90	82

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	6%	6%	6%	7%	8%	7%	2%	7%	3%	8%	0%	6%	0%	3%	5%	9%	10%	2%	3%	10%	3%
Bills show one big change in first year	8%	9%	7%	14%	2%	9%	17%	10%	9%	4%	9%	8%	0%	12%	7%	0%	4%	18%	0%	7%	10%
Bills change steadily every year	86%	85%	87%	80%	90%	84%	82%	82%	88%	88%	91%	86%	100%	85%	88%	91%	86%	80%	97%	83%	87%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	198	97	101	12	82	61	44	65	77	56	9	187	2	30	50	27	59	33	28	87	82

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	2. Ensuring a reliable and continuous water supply	Maintain current service (Less than £1)	Maintain current service (£1)	Maintain current service (£1)
	3. Ensuring the safety of tap water	Meet current and future standards at 7 of treatment works. 20 Km of water mains renovated to complete the renovation previously agreed. 8,630 of water company lead pipes replaced to meet new lead standards (£10)	Meet current and future standards at 7 treatment works. 20 Km of water mains renovated to complete the renovation previously agreed. 8,630 of water company lead pipes replaced to meet new lead standards (£9)	Meet current and future standards at 7 treatment works, 20 Km of water mains renovated to complete the renovation previously agreed, 8,630 of water company lead pipes replaced to meet new lead standards (£9)
	4. Managing the appearance, taste and smell of tap water	No increase in the levels of customer complaints about the appearance, taste or smell of tap water (£3)	No increase in the levels of customer complaints about the appearance, taste or smell of tap water (£3)	No increase in the levels of customer complaints about the appearance, taste or smell of tap water (£3)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Provide a freephone customer debt-line, a Charitable Trust and new payment options for customers who have difficulty paying bills (Less	Provide a freephone customer debt-line, a Charitable Trust and new payment options for customers who have difficulty paying bills (Less than £1)	Provide a freephone customer debt-line, a Charitable Trust and new payment options for customers who have difficulty paying bills (Less
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 502 to 293, Reduce the number of properties externally flooding from sewers by 449. (£9)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (Less than £1)	43 Km of rivers can better support fish and rare wildlife, 0 wetlands and lakes are restored and protected to support rare wildlife (£1)	86 Km of rivers can better support fish and rare wildlife,1 wetlands or lake restored and protected to support rare wildlife (£11)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	180 Km of rivers can better support fish, 135 Km of rivers and 80Km2 of coastal waters can support rare wildlife, 1 lakes are improved can support rare wildlife. (£43)	237 Km of rivers can better support fish, 179 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lake are improved and can support rare wildlife. (£57)	569 Km of rivers can better support fish, 205 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lakes are improved and can support rare wildlife. (£89)
		Overall cost on average bill taking account of cost savings by 2010 is £68 (excluding inflation). Overall bill by 2010 is £300 (plus inflation)	Overall cost taking account of cost savings on average bill by 2010 is £68 (excluding inflation)Overall bill by 2010 is £301 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £98 (plus inflation). Overall bill by 2010 is £331 (plus inflation)

1. Key Findings

South East Water is a water supply only company providing water services to a population area of 1.4 million. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £89
Reference Plan A - £81
Reference Plan B - £112

☐ 73% of customers said that they were satisfied with the overall service provided by South East Water with 46% indicating that this service was good value for money. 13% of customers expressed dissatisfaction with the services and 25% of customers said that the services represent poor value for money.

☐ Customers thought it most important to maintain the 'safety of tap water' (98%) and 'a reliable and continuous water supply' (97%). Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs' (82%). Customers thought it most and equally important for improvements to 'the safety of tap water', 'managing the appearance taste and smell of tap water' and 'avoiding the risk of homes and gardens being flooded with sewage' (all 86%) to be introduced by 2010. Least importance was attached to improvements in 'handling customer accounts, queries, complaints and customers with special needs' (63%).

☐ Customers did not appear to have a significant preference for the set of proposals within any one of the three plans (each of which proposed a combination of maintained and improved services). The element with the greatest customer approval is different within each company plan; 'avoid the risk of homes and gardens being flooded with sewage' (67%) within the Company Preferred Plan, 'ensure the safety of tap water' (66%) in Reference Plan A and 'ensuring a reliable and continuous water supply' (65%) for Reference Plan B. 'Handling customers accounts, queries, complaints and customers with special needs' was ranked as the lowest priority within each plan, with customer support ranging from 49% for Reference Plan B, 51% for Reference Plan A and 52% for the Company Preferred Plan.

☐ 52% of customers suggested that there was no need for further improvements than those proposed in the plans. 'Ensuring the safety of tap water' and 'managing the appearance, taste and smell of tap water were regarded by 13% and 15% of customers respectively as deserving further improvement from that described in the plans.

☐ Approximately the same proportion of customers regarded all three plans as good value for money (49% for Reference Plan A, 46% for Company Preferred Plan and 44% for Reference Plan B). The proportions regarding the plans as poor value for money were 41% for Reference Plan B (including 20% who said that it was extremely poor value for money) 36% for Reference Plan A and 35% for the Company Preferred Plan.

☐ More customers said that they were 'willing to pay' for the Company Preferred Plan (62% - 35% probably willing,27% definitely willing) and Reference Plan A (61% - 33% probably willing, 28% definitely willing) than Reference Plan B (53% - 33% probably willing, 20% definitely willing). The proportion of customers indicating that they were 'not willing to pay' ranged between 37% for the Company Preferred Plan and Reference Plan A (19% probably not willing, 18% definitely not willing) and 44% for Reference Plan B (18% probably not willing, 26% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because 'the cost was too much for the improvements' (64% Company Preferred Plan, 55% Reference Plan A and 56% Reference Plan B). Between 9% and 12% of all South East Water customers indicated that they could not afford the bill increases set out in the proposed company plans (9% for the Company Preferred Plan, 10% for Reference Plan A and 12% for Reference Plan B).

☐ 51% of customers expressed concern about delays to service improvements, 43% didn't. The greatest concern was expressed for delays to improvements to 'ensuring the safety of tap water' (20%). 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 77% of South East Water customers indicated that their preferred bill option for the period 2005-2010 is for bills to change steadily each year so they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the four which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £3/annum), 'avoiding the risk of homes and gardens being flooded with sewage' (£4-£9/annum), 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£3-8/annum) and 'managing the appearance, taste and smell of tap water' (£2/annum).

2. Introduction

The attitudes and preferences of South East Water customers, reported in section 3, are based on a sample of 201 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services (Southern)

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.78% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 4,477 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	84 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.7% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	507 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	8 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	83% of rivers are of good, 10% fair and 7% poor quality. 99% of designated bathing waters meet minimum standards and 76% meet higher standards. 58% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £283 per annum

Current Provision of Water and Sewerage Services (Thames)

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
TAP WATER	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
TAP WATER	3. Ensuring the safety of tap water	99.78% of samples meeting the current standards for drinking water
TAP WATER	4. Managing the appearance, taste and smell of tap water	Approximately 4,477 customer complaints/contacts about the appearance, taste and smell of tap water each year
TAP WATER	5. Managing the pressure of water in your taps and interruptions to supply	84 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.7% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
SEWERAGE	8. Avoiding the risk of homes and gardens being flooded with sewage	4,050 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	8 wetlands, lakes and rivers may be affected by the water companies taking too much water
ENVIRONMENT	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	84% of rivers are of good, 11% fair and 5% poor quality. 100% of designated bathing waters meet minimum standards and 73% meet higher standards. 86% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £215 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	3%	2%	5%	0%	3%	3%	8%	1%	2%	10%	5%	3%	0%	20%	0%	2%	0%	4%	10%	4%	0%
Very dissatisfied	4%	5%	4%	0%	6%	3%	3%	3%	7%	3%	7%	3%	0%	2%	3%	11%	4%	2%	5%	5%	3%
Fairly dissatisfied	6%	5%	6%	0%	3%	10%	5%	4%	4%	12%	7%	5%	0%	11%	5%	6%	5%	5%	0%	7%	2%
Neither satisfied nor dissatisfied	12%	13%	11%	0%	18%	5%	10%	13%	11%	11%	27%	7%	0%	9%	4%	4%	10%	23%	11%	14%	2%
Fairly satisfied	26%	27%	24%	0%	25%	32%	12%	23%	28%	26%	14%	30%	0%	9%	33%	21%	32%	23%	11%	25%	30%
Very satisfied	36%	34%	37%	42%	34%	29%	53%	45%	30%	27%	21%	41%	0%	28%	40%	38%	38%	32%	33%	33%	50%
Extremely satisfied	11%	10%	11%	58%	10%	11%	10%	6%	16%	12%	16%	9%	0%	21%	15%	13%	8%	7%	11%	11%	13%
Dont know/cant say	2%	4%	1%	0%	1%	7%	0%	5%	1%	0%	3%	1%	100%	0%	0%	4%	3%	3%	17%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	6%	9%	3%	0%	5%	8%	3%	6%	3%	11%	6%	6%	0%	13%	6%	2%	2%	10%	10%	7%	0%
Very poor value	5%	6%	4%	0%	3%	6%	8%	2%	9%	3%	5%	4%	100%	15%	6%	0%	4%	4%	5%	5%	0%
Fairly poor value	14%	19%	9%	42%	9%	10%	34%	19%	8%	14%	12%	15%	0%	16%	2%	20%	10%	21%	21%	12%	23%
Neither poor nor good value	26%	23%	28%	0%	37%	15%	14%	22%	28%	29%	32%	23%	0%	23%	27%	37%	29%	16%	17%	24%	35%
Fairly good value	30%	26%	35%	29%	31%	37%	19%	32%	31%	26%	22%	33%	0%	27%	19%	22%	41%	27%	23%	29%	40%
Very good value	11%	9%	13%	0%	9%	14%	14%	9%	13%	11%	7%	12%	0%	4%	23%	8%	12%	8%	0%	14%	0%
Extremely good value	5%	6%	4%	30%	5%	7%	2%	4%	6%	7%	14%	2%	0%	2%	13%	7%	0%	8%	17%	5%	2%
Dont know/cant say	4%	4%	3%	0%	2%	3%	7%	7%	2%	0%	1%	4%	0%	0%	4%	4%	3%	5%	6%	4%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	96%	97%	95%	100%	95%	96%	95%	98%	95%	93%	97%	95%	100%	93%	98%	97%	97%	94%	83%	96%	96%
Ensuring a reliable & continuous water supply	97%	96%	98%	100%	95%	98%	97%	96%	96%	99%	97%	97%	100%	98%	98%	100%	94%	97%	83%	98%	92%
Ensuring the safety of tap water	98%	96%	100%	100%	98%	99%	97%	100%	96%	99%	98%	98%	100%	98%	98%	98%	99%	98%	89%	99%	97%
Managing the appearance, taste & smell of tap water	92%	95%	89%	58%	93%	93%	92%	90%	94%	91%	95%	91%	100%	90%	92%	97%	93%	88%	89%	92%	92%
Managing the pressure of water in your taps & the number of unplanned interruptions	90%	92%	89%	100%	90%	89%	90%	89%	90%	93%	94%	89%	100%	95%	79%	82%	95%	92%	73%	90%	96%
Handling customers' accounts, queries, complaints & customers with special needs	82%	79%	85%	70%	85%	74%	88%	81%	83%	82%	90%	79%	100%	83%	77%	77%	87%	80%	61%	81%	92%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	94%	91%	97%	100%	95%	95%	87%	89%	96%	97%	90%	95%	100%	96%	98%	93%	97%	87%	67%	94%	100%
Avoid the risk of homes & gardens being flooded with sewerage	94%	95%	94%	100%	98%	94%	84%	93%	94%	98%	91%	95%	100%	98%	94%	96%	100%	85%	94%	93%	100%
Managing the amount of water taken from the environment to supply customers	89%	86%	91%	29%	89%	93%	87%	90%	85%	93%	87%	90%	100%	93%	94%	87%	90%	85%	61%	90%	89%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	90%	86%	93%	70%	89%	97%	81%	93%	85%	92%	84%	92%	100%	82%	94%	86%	95%	86%	56%	90%	97%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	80%	79%	81%	58%	80%	80%	80%	79%	78%	84%	88%	78%	0%	100%	90%	77%	77%	73%	88%	88%	36%
Ensuring a reliable & continuous water supply	77%	75%	80%	58%	73%	84%	77%	69%	79%	91%	88%	75%	0%	100%	86%	80%	75%	67%	88%	89%	15%
Ensuring the safety of tap water	86%	80%	92%	100%	85%	88%	82%	81%	88%	91%	91%	85%	0%	93%	91%	95%	83%	80%	94%	94%	44%
Managing the appearance, taste & smell of tap water	86%	85%	88%	58%	87%	88%	83%	87%	86%	87%	94%	84%	0%	90%	86%	94%	85%	84%	94%	87%	72%
Managing the pressure of water in your taps & the number of unplanned interruptions	71%	67%	74%	100%	63%	76%	77%	63%	72%	84%	85%	67%	0%	98%	76%	60%	68%	67%	73%	81%	20%
Handling customers' accounts, queries, complaints & customers with special needs	63%	57%	69%	70%	57%	66%	71%	60%	59%	76%	72%	61%	0%	75%	71%	52%	63%	61%	67%	70%	29%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	82%	76%	88%	58%	82%	86%	77%	79%	83%	89%	95%	79%	0%	98%	86%	84%	77%	81%	61%	93%	39%
Avoid the risk of homes & gardens being flooded with sewerage	86%	84%	88%	100%	78%	91%	95%	81%	88%	93%	96%	83%	0%	98%	95%	80%	81%	87%	94%	95%	40%
Managing the amount of water taken from the environment to supply customers	78%	75%	81%	58%	76%	80%	80%	77%	73%	87%	87%	75%	0%	90%	90%	82%	75%	70%	67%	88%	37%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	80%	74%	86%	100%	78%	88%	68%	78%	80%	83%	80%	81%	0%	87%	94%	84%	84%	64%	67%	86%	55%
No of respondents	199	98	101	3	95	63	35	82	74	43	48	150	1	21	27	27	69	55	9	158	31

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	59%	59%	60%	100%	61%	51%	62%	60%	59%	59%	56%	60%	100%	54%	60%	57%	67%	53%	23%	59%	76%
Ensuring a reliable & continuous water supply	62%	58%	66%	100%	65%	60%	53%	60%	62%	67%	60%	62%	100%	54%	70%	67%	71%	48%	23%	64%	65%
Ensuring the safety of tap water	65%	62%	69%	100%	72%	59%	55%	59%	68%	74%	71%	63%	100%	58%	66%	61%	73%	61%	29%	69%	59%
Managing the appearance, taste & smell of tap water	65%	59%	70%	100%	68%	61%	58%	61%	65%	71%	68%	63%	100%	55%	73%	62%	68%	62%	29%	70%	50%
Managing the pressure of water in your taps & the number of unplanned interruptions	54%	52%	57%	100%	61%	47%	43%	46%	60%	62%	54%	54%	100%	55%	60%	47%	66%	40%	29%	59%	42%
Handling customers' accounts, queries, complaints & customers with special needs	52%	52%	52%	100%	54%	45%	53%	48%	55%	56%	55%	51%	100%	51%	60%	38%	62%	43%	23%	57%	39%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	62%	57%	67%	100%	66%	57%	53%	62%	61%	63%	67%	60%	100%	58%	71%	61%	68%	52%	23%	66%	53%
Avoid the risk of homes & gardens being flooded with sewerage	67%	62%	71%	100%	67%	65%	63%	70%	62%	66%	66%	66%	100%	54%	71%	65%	67%	70%	29%	68%	70%
Managing the amount of water taken from the environment to supply customers	58%	56%	59%	100%	61%	51%	53%	55%	58%	60%	59%	57%	100%	51%	62%	54%	67%	48%	23%	59%	60%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	57%	54%	60%	100%	61%	55%	43%	55%	59%	59%	51%	59%	100%	51%	64%	52%	72%	40%	23%	56%	72%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	63%	59%	66%	71%	66%	56%	62%	65%	59%	64%	50%	66%	100%	51%	67%	57%	70%	58%	23%	62%	78%
Ensuring a reliable & continuous water supply	64%	62%	66%	71%	66%	60%	63%	67%	59%	66%	57%	66%	100%	51%	74%	68%	70%	56%	29%	64%	74%
Ensuring the safety of tap water	66%	64%	68%	71%	72%	58%	64%	66%	63%	71%	64%	67%	100%	51%	69%	58%	74%	65%	29%	68%	68%
Managing the appearance, taste & smell of tap water	62%	59%	64%	71%	66%	56%	57%	63%	60%	62%	58%	63%	100%	51%	71%	48%	73%	54%	29%	64%	58%
Managing the pressure of water in your taps & the number of unplanned interruptions	55%	55%	54%	71%	60%	46%	52%	55%	53%	58%	50%	56%	100%	51%	63%	36%	67%	45%	23%	58%	47%
Handling customers' accounts, queries, complaints & customers with special needs	51%	50%	53%	71%	55%	43%	52%	50%	47%	62%	52%	51%	100%	44%	65%	40%	61%	41%	23%	54%	43%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	63%	58%	69%	71%	71%	51%	63%	67%	59%	63%	57%	65%	100%	51%	75%	50%	70%	61%	23%	62%	83%
Avoid the risk of homes & gardens being flooded with sewerage	64%	56%	72%	71%	69%	56%	63%	69%	57%	68%	58%	66%	100%	51%	74%	59%	67%	62%	29%	62%	81%
Managing the amount of water taken from the environment to supply customers	57%	55%	59%	71%	62%	50%	52%	59%	53%	60%	53%	58%	100%	44%	69%	57%	63%	49%	23%	57%	65%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	55%	52%	57%	71%	60%	51%	42%	55%	50%	63%	51%	56%	100%	44%	67%	54%	66%	40%	23%	53%	70%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	61%	58%	64%	71%	64%	54%	61%	64%	58%	61%	51%	64%	100%	51%	61%	57%	70%	55%	17%	59%	80%
Ensuring a reliable & continuous water supply	65%	58%	72%	71%	70%	58%	64%	66%	63%	67%	60%	66%	100%	55%	64%	63%	74%	59%	23%	65%	76%
Ensuring the safety of tap water	63%	59%	67%	71%	68%	53%	64%	62%	61%	68%	60%	64%	100%	48%	68%	54%	71%	61%	23%	64%	68%
Managing the appearance, taste & smell of tap water	61%	56%	65%	71%	66%	54%	56%	61%	59%	64%	59%	61%	100%	48%	55%	55%	71%	58%	23%	63%	58%
Managing the pressure of water in your taps & the number of unplanned interruptions	53%	53%	53%	71%	55%	48%	51%	53%	52%	55%	51%	53%	100%	48%	56%	40%	67%	42%	17%	56%	45%
Handling customers' accounts, queries, complaints & customers with special needs	49%	49%	50%	71%	51%	42%	51%	50%	45%	53%	48%	49%	100%	37%	53%	34%	63%	41%	17%	52%	43%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	62%	60%	64%	71%	66%	53%	62%	68%	57%	60%	60%	62%	100%	44%	68%	58%	71%	56%	17%	62%	70%
Avoid the risk of homes & gardens being flooded with sewerage	63%	56%	69%	71%	67%	55%	62%	66%	56%	68%	57%	64%	100%	48%	64%	63%	66%	63%	23%	61%	81%
Managing the amount of water taken from the environment to supply customers	57%	53%	60%	71%	63%	47%	51%	57%	51%	65%	56%	56%	100%	37%	62%	63%	61%	53%	17%	58%	62%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	52%	49%	54%	71%	57%	47%	41%	56%	49%	48%	45%	54%	100%	41%	57%	44%	64%	41%	17%	52%	60%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	8%
Ensuring a reliable & continuous water supply	9%
Ensuring the safety of tap water	13%
Managing the appearance, taste & smell of tap water	15%
Managing the pressure of water in your taps & the number of unplanned interruptions	4%
Handling customers' accounts, queries, complaints & customers with special needs	6%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	6%
Avoid the risk of homes & gardens being flooded with sewerage	8%
Managing the amount of water taken from the environment to supply customers	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	6%
Upgrade water pipes	3%
(further) reduce limescale in water	8%
Introduce option of having a water meter	1%
Reduce chemical treatments in water supply	1%
Speed up process of repairs	2%
(further) improve cleanliness of the rivers	1%
maintain the correct service level	1%
Improve communication of water shutdown	1%
Improve quality of pipe repair workmanship	1%
More water conservation education	1%
No, none	52%
No of respondents	201

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	10%	14%	6%	0%	7%	17%	8%	10%	9%	14%	13%	9%	0%	22%	2%	6%	3%	20%	21%	11%	4%
Very poor value	9%	13%	5%	0%	10%	2%	24%	9%	12%	6%	4%	11%	0%	12%	10%	5%	6%	14%	0%	8%	21%
Fairly poor value	16%	16%	16%	0%	17%	10%	26%	14%	12%	28%	22%	14%	0%	35%	17%	12%	12%	16%	17%	15%	19%
Neither poor nor good value	15%	12%	18%	42%	19%	12%	10%	12%	22%	10%	14%	16%	0%	2%	26%	13%	15%	16%	33%	13%	21%
Fairly good value	32%	30%	35%	58%	31%	38%	18%	40%	28%	24%	29%	33%	0%	11%	24%	42%	44%	24%	23%	33%	31%
Very good value	10%	8%	11%	0%	11%	9%	7%	7%	11%	12%	7%	10%	100%	4%	18%	16%	12%	1%	0%	11%	4%
Extremely good value	4%	3%	4%	0%	3%	7%	0%	4%	4%	3%	4%	3%	0%	7%	3%	3%	1%	5%	0%	4%	0%
Dont know/cant say	4%	4%	4%	0%	2%	5%	7%	5%	3%	3%	8%	3%	0%	6%	0%	2%	6%	4%	6%	5%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	10%	14%	7%	0%	7%	16%	10%	8%	12%	13%	11%	10%	0%	20%	2%	6%	2%	23%	21%	11%	4%
Very poor value	11%	15%	7%	0%	11%	10%	16%	14%	11%	7%	10%	11%	100%	13%	2%	10%	11%	17%	23%	8%	24%
Fairly poor value	15%	15%	15%	29%	19%	8%	18%	12%	17%	18%	19%	14%	0%	28%	15%	15%	11%	15%	33%	13%	18%
Neither poor nor good value	10%	11%	9%	0%	9%	6%	26%	5%	14%	15%	14%	9%	0%	14%	18%	0%	7%	15%	0%	11%	10%
Fairly good value	28%	22%	33%	42%	28%	35%	11%	30%	26%	26%	20%	30%	0%	11%	29%	34%	37%	18%	12%	29%	25%
Very good value	19%	17%	22%	30%	24%	17%	13%	24%	17%	14%	21%	19%	0%	0%	33%	31%	25%	7%	11%	20%	20%
Extremely good value	2%	1%	3%	0%	3%	3%	0%	1%	2%	3%	0%	3%	0%	7%	0%	3%	1%	2%	0%	3%	0%
Dont know/cant say	3%	3%	3%	0%	0%	5%	7%	5%	1%	3%	5%	3%	0%	6%	0%	0%	4%	4%	0%	4%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	20%	24%	15%	29%	23%	20%	10%	15%	24%	21%	24%	18%	0%	27%	10%	21%	11%	31%	60%	20%	5%
Very poor value	12%	16%	9%	0%	7%	11%	31%	17%	9%	8%	12%	12%	0%	19%	10%	11%	6%	20%	6%	9%	31%
Fairly poor value	9%	5%	13%	0%	11%	5%	14%	8%	8%	14%	6%	10%	0%	16%	17%	1%	8%	9%	11%	8%	16%
Neither poor nor good value	13%	13%	13%	0%	14%	12%	12%	8%	18%	14%	23%	10%	0%	7%	11%	12%	11%	19%	5%	12%	19%
Fairly good value	27%	25%	28%	42%	26%	30%	20%	34%	20%	25%	17%	30%	0%	19%	25%	38%	34%	16%	0%	28%	24%
Very good value	13%	11%	14%	30%	13%	13%	10%	13%	16%	7%	9%	14%	0%	0%	17%	14%	23%	2%	17%	14%	4%
Extremely good value	4%	3%	6%	0%	6%	4%	3%	4%	4%	7%	8%	3%	100%	7%	10%	3%	4%	2%	0%	6%	0%
Dont know/cant say	2%	2%	2%	0%	0%	5%	0%	2%	1%	3%	2%	2%	0%	6%	0%	0%	3%	2%	0%	3%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	18%	22%	14%	0%	14%	19%	26%	10%	21%	27%	17%	18%	0%	45%	22%	6%	3%	30%	33%	19%	6%
Probably not willing to pay	19%	20%	18%	0%	19%	15%	28%	20%	15%	25%	22%	18%	0%	15%	15%	19%	16%	27%	17%	15%	39%
Probably willing to pay	35%	30%	40%	71%	37%	35%	29%	41%	33%	26%	33%	36%	0%	20%	44%	45%	38%	28%	45%	36%	27%
Definitely willing to pay	27%	27%	26%	29%	29%	29%	14%	28%	29%	20%	25%	27%	100%	20%	19%	27%	41%	15%	5%	28%	27%
Dont know/Cant say	1%	1%	2%	0%	1%	2%	3%	1%	1%	1%	3%	1%	0%	0%	0%	3%	1%	1%	0%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	10%	12%	7%	0%	7%	19%	5%	15%	9%	6%	10%	10%	0%	11%	6%	0%	6%	15%	12%	13%	0%
Cost too much for improvement	64%	71%	54%	0%	73%	54%	57%	81%	72%	35%	61%	65%	0%	14%	57%	91%	94%	67%	36%	58%	91%
Cant afford it	23%	13%	36%	0%	13%	28%	34%	5%	19%	47%	25%	22%	0%	75%	15%	9%	0%	17%	52%	24%	9%
Dont know/Cant say	4%	4%	3%	0%	6%	0%	3%	0%	0%	11%	4%	3%	0%	0%	23%	0%	0%	1%	0%	5%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	74	42	32	0	31	22	19	25	27	23	19	55	0	13	10	7	14	31	5	54	14

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	18%	21%	15%	0%	16%	21%	19%	13%	18%	27%	19%	18%	0%	45%	8%	6%	6%	33%	27%	17%	21%
Probably not willing to pay	19%	19%	19%	29%	20%	9%	30%	16%	23%	19%	22%	18%	0%	12%	21%	25%	10%	30%	45%	16%	28%
Probably willing to pay	33%	33%	33%	42%	25%	40%	37%	38%	30%	27%	34%	33%	0%	29%	39%	28%	37%	27%	17%	36%	23%
Definitely willing to pay	28%	25%	30%	30%	35%	27%	11%	32%	24%	25%	20%	30%	100%	14%	29%	37%	43%	9%	11%	28%	28%
Dont know/Cant say	3%	2%	3%	0%	3%	3%	3%	1%	5%	1%	5%	2%	0%	0%	3%	3%	4%	1%	0%	3%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	17%	22%	11%	0%	22%	20%	6%	23%	18%	9%	14%	18%	0%	19%	7%	30%	21%	14%	52%	18%	0%
Cost too much for improvement	55%	59%	51%	0%	65%	49%	51%	72%	55%	35%	52%	56%	0%	20%	49%	53%	70%	64%	17%	49%	91%
Cant afford it	27%	18%	37%	100%	12%	28%	43%	5%	26%	55%	30%	25%	0%	60%	37%	18%	8%	21%	23%	32%	9%
Dont know/Cant say	1%	1%	1%	0%	1%	3%	0%	0%	2%	2%	3%	1%	0%	0%	7%	0%	0%	1%	8%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	74	40	34	1	35	19	17	24	30	20	20	54	0	12	8	8	11	35	7	52	15

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	26%	30%	23%	29%	30%	23%	26%	22%	31%	26%	34%	24%	0%	35%	14%	26%	12%	47%	60%	25%	25%
Probably not willing to pay	18%	18%	18%	0%	12%	20%	30%	17%	16%	25%	16%	19%	0%	28%	27%	10%	11%	24%	17%	14%	42%
Probably willing to pay	33%	33%	33%	42%	34%	36%	29%	39%	33%	22%	32%	34%	0%	10%	35%	46%	41%	25%	11%	35%	27%
Definitely willing to pay	20%	16%	23%	30%	24%	20%	9%	18%	17%	26%	12%	21%	100%	27%	21%	14%	33%	1%	11%	23%	5%
Dont know/Cant say	3%	3%	3%	0%	2%	2%	6%	4%	2%	1%	6%	2%	0%	0%	3%	3%	3%	3%	0%	4%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	16%	23%	8%	0%	16%	25%	5%	21%	12%	15%	14%	17%	0%	18%	14%	6%	30%	13%	13%	19%	9%
Cost too much for improvement	56%	54%	58%	0%	64%	53%	51%	70%	57%	33%	57%	56%	0%	14%	55%	45%	64%	70%	23%	50%	83%
Cant afford it	27%	21%	34%	100%	19%	20%	44%	9%	29%	50%	27%	27%	0%	69%	26%	50%	6%	17%	56%	30%	8%
Dont know/Cant say	1%	1%	1%	0%	1%	2%	0%	0%	2%	2%	2%	1%	0%	0%	5%	0%	0%	1%	8%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	89	47	42	1	39	28	20	33	34	22	24	65	0	13	11	10	16	39	7	61	21

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	25%	35%	14%	29%	16%	24%	49%	26%	20%	30%	35%	21%	0%	39%	19%	19%	12%	41%	39%	26%	13%
Not very concerned	18%	13%	23%	0%	23%	12%	19%	14%	22%	19%	25%	16%	0%	25%	26%	14%	19%	13%	0%	19%	19%
Fairly concerned	24%	21%	27%	42%	31%	18%	14%	26%	26%	17%	11%	29%	0%	0%	20%	29%	40%	13%	11%	22%	43%
Very concerned	27%	26%	28%	30%	27%	38%	7%	30%	25%	25%	23%	28%	100%	22%	25%	38%	25%	27%	27%	27%	25%
Dont know/cant say	6%	5%	8%	0%	4%	7%	11%	4%	7%	9%	7%	6%	0%	14%	11%	0%	4%	6%	23%	6%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	10%	6%	14%	0%	11%	14%	2%	12%	9%	9%	6%	11%	0%	0%	0%	17%	12%	12%	11%	9%	14%
Ensuring a reliable & continuous water supply	9%	10%	8%	0%	5%	17%	5%	15%	5%	5%	2%	12%	0%	0%	14%	8%	12%	7%	0%	9%	8%
Ensuring the safety of tap water	20%	18%	21%	42%	20%	27%	4%	28%	11%	18%	12%	22%	100%	0%	16%	21%	29%	15%	11%	17%	31%
Managing the appearance, taste & smell of tap water	4%	3%	6%	0%	3%	8%	2%	6%	3%	3%	8%	3%	0%	0%	0%	5%	4%	7%	0%	4%	5%
Managing the pressure of water in your taps & the number of unplanned interruptions	3%	3%	2%	0%	3%	1%	0%	2%	4%	0%	0%	3%	0%	0%	0%	3%	5%	2%	0%	3%	3%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	9%	3%	14%	42%	10%	12%	0%	15%	7%	0%	0%	12%	0%	0%	8%	14%	10%	9%	0%	7%	22%
Avoid the risk of homes & gardens being flooded with sewerage	5%	1%	9%	0%	8%	0%	4%	6%	3%	6%	4%	5%	0%	0%	0%	6%	5%	9%	0%	4%	9%
Managing the amount of water taken from the environment to supply customers	5%	5%	5%	0%	6%	6%	0%	9%	3%	0%	5%	4%	100%	0%	3%	5%	11%	0%	0%	4%	10%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	7%	8%	7%	0%	12%	6%	0%	15%	3%	0%	5%	8%	100%	0%	3%	2%	19%	0%	0%	7%	14%
No of respondents	201	100	101	3	95	65	35	84	74	43	48	152	1	21	27	27	71	55	9	159	31

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	15%	21%	10%	30%	10%	16%	28%	17%	14%	14%	23%	13%	0%	7%	13%	12%	15%	22%	0%	18%	7%
Bills show one big change in first year	8%	10%	7%	0%	7%	14%	3%	11%	5%	8%	4%	9%	0%	11%	8%	2%	5%	13%	0%	10%	0%
Bills change steadily every year	77%	69%	84%	70%	83%	70%	69%	72%	81%	78%	72%	78%	100%	82%	79%	86%	80%	65%	100%	72%	93%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	200	98	101	3	95	64	35	83	74	43	47	152	1	21	27	27	71	54	9	158	31

4 Company Plans

4.1 South East Water (Southern)

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£21)	Maintain current service (£12)	Maintain current service (£12)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£11)	Maintain current service (£7)	Maintain current service (£7)
	3. Ensuring the safety of tap water	Meet current and future standards at 3 of treatment works, 681 Km of water mains renovated to complete the renovation previously agreed, 3,760 of water company lead pipes replaced to meet new lead standards (£3)	Meet current and future standards at 3 treatment works, 680 Km of water mains renovated to complete the renovation previously agreed,3,760 of water company lead pipes replaced to meet new lead standards (£3)	Meet current and future standards at 3 treatment works, 680 Km of water mains renovated to complete the renovation previously agreed, 3,760 of water company lead pipes replaced to meet new lead standards (£3)
	4. Managing the appearance, taste and smell of tap water	At least 4% fewer customer complaints about the appearance of tap water (£2)	At least 4% fewer customer complaints about the appearance of tap water (£2)	At least 4 % fewer customer complaints about the appearance, taste or smell of tap water (£2)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 502 to 293. Reduce the number of properties externally flooding from sewers by	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	3 wetlands and lakes are restored and protected to support rare wildlife (£1)	3 wetlands and lakes are restored and protected to support rare wildlife (£1)	3 wetlands and lakes are restored and protected to support rare wildlife (£1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	180 Km of rivers can better support fish, 135 Km of rivers and 80Km2 of coastal waters can support rare wildlife, 1 lakes are improved can support rare wildlife. (£43)	237 Km of rivers can better support fish, 179 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lake improved and can support rare wildlife (£57)	569 Km of rivers can better support fish, 205 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lakes improved and can support rare wildlife (£89)
		Overall cost on average bill taking account of cost savings by 2010 is £89 (excluding inflation). Overall bill by 2010 is £372 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £81 (plus inflation). Overall bill by 2010 is £364 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £112 (plus inflation). Overall bill by 2010 is £395 (plus inflation)

4.2 South East Water (Thames)

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£21)	Maintain current service (£12)	Maintain current service (£12)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£11)	Maintain current service (£7)	Maintain current service (£7)
	3. Ensuring the safety of tap water	Meet current and future standards at 3 of treatment works, 681 Km of water mains renovated to complete the renovation previously agreed, 3,760 of water company lead pipes replaced to meet new lead standards (£3)	Meet current and future standards at 3 treatment works, 680 Km of water mains renovated to complete the renovation previously agreed, 3,760 of water company lead pipes replaced to meet new lead standards (£3)	Meet current and future standards at 3 treatment works, 680 Km of water mains renovated to complete the renovation previously agreed, 3,760 of water company lead pipes replaced to meet new lead standards (£3)
	4. Managing the appearance, taste and smell of tap water	At least 4% fewer customer complaints about the appearance of tap water (£2)	At least 4% fewer customer complaints about the appearance of tap water (£2)	At least 4% fewer customer complaints about the appearance, taste or smell of tap water (£2)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£8)	Maintain current service (£7)	Maintain current service (£7)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 3,521 to 1,030, Reduce the number of properties externally flooding from sewers by 1,478. (£7)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£4)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£5)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	3 wetlands and lakes are restored and protected to support rare wildlife (£1)	3 wetlands and lakes are restored and protected to support rare wildlife (£1)	3 wetlands and lakes are restored and protected to support rare wildlife (£1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	130 Km of rivers can better support fish, 50 Km of rivers and can support rare wildlife. (£2)	164 Km of rivers can better support fish, 62 Km of rivers can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife (£4)	439 Km of rivers can better support fish, 62 Km of rivers can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife (£7)
		Overall cost on average bill taking account of cost savings by 2010 is £34 (excluding inflation). Overall bill by 2010 is £248 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £20 (plus inflation). Overall bill by 2010 is £235 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £26 (plus inflation). Overall bill by 2010 is £240 (plus inflation)

1. Key Findings

Severn Trent Water is a water and sewerage company serving a population of over 3 million customers with water and 3.3 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £37
Reference Plan A - £31
Reference Plan B - £39

☐ 77% of customers expressed satisfaction with the water and sewerage levels of service provided by Severn Trent and 57% regard this as good value for money. 13% of customers expressed dissatisfaction with the service and 20% regard the service as poor value for money.

☐ Customers thought it most and equally important to maintain the 'safety of tap water' (98%) and 'a reliable and continuous water supply' (98%). Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs' (84%). Customers thought it most and equally important for improvements to 'the safety of tap water' and 'managing the appearance taste and smell of tap water' (both 89%) to be introduced by 2010. Considerably less importance was attached to improvements in 'handling customer accounts, queries, complaints and customers with special needs' (68%).

☐ Customer support for all three company plans (each of which proposed a combination of maintained and improved services) is similar. The proposed outputs customers would most like to see are those to 'ensure the safety of tap water' (72% - 74%), 'manage the appearance taste and smell of tap water' (67%-68%), 'ensure a reliable and continuous water supply' (64% - 67%) and 'manage the pressure of water in the taps and the number of unplanned interruptions (62% to 64%). 'Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' was ranked as the lowest priority within each plan, with customer support ranging from 50% for Reference Plan B, 51% for Reference Plan A and 53% for the Company Preferred Plan.

☐ 67% of customers expressed the view that there was no area of service that required more improvement than those proposed in the plans. Of those customers that did express the view that more improvements were required, 'managing the appearance taste and smell of tap water' (15%) and 'ensuring the safety of tap water' (13%) were identified as the most important.

☐ There are only marginal differences in customers' assessments of the three plans in terms of value for money. The proportion of customers considering each good value for money is 53% for the Company Preferred Plan, 52% for Reference Plan A and 49% for Reference Plan B. 25%, 30% and 32% respectively, regarded the Company Preferred Plan, Reference Plan A and Reference Plan B as poor value for money.

☐ The proportions of customers indicating that they were 'willing to pay' was broadly similar for all three plans. This ranged between a low of 59% for Reference Plan B (40% probably willing, 19% definitely willing), 62% for Company Preferred Plan (44% probably willing, 18% definitely willing) and 63% for Reference Plan A (45% probably willing, 18% definitely willing). The proportion of customers indicating that they were 'not willing to pay' was also similar for all three plans. This ranged between a low of 34% for Reference Plan A (19% probably not willing, 15% definitely not willing) and the Company Preferred Plan (17% probably not willing, 17% definitely not willing) and 36% for Reference Plan B (18% probably not willing, 18% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (34% for Company Preferred Plan and Reference Plan A and 36% Reference Plan B). Between 10% and 11% of all Severn Trent customers indicated that they could not afford the bill increases set out in the proposed company plans (10% for Company Preferred Plan and Reference Plan A and 11% for Reference Plan B).

☐ 51% of customers stated that they would not be concerned if some of the improvements had to be delayed; 39% indicated that they would be concerned. Customers would be most concerned if there was delay in improvement programmes to 'ensuring the safety of tap water' (19%). 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 82% of Severn Trent Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £4-£5/annum), 'managing the appearance, taste and smell of tap water' (up to £1/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£11-£12/annum).

2. Introduction

The attitudes and preferences of Severn Trent Water customers, reported in section 3, are based on a sample of 402 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than three times every one hundred years
	3. Ensuring the safety of tap water	99.91% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 11,161 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	1,000 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	935 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	30 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	85% of rivers are of good, 9% fair and 6% poor quality.79% of rivers may be at risk from weed growth that can adversely affect wildlife

Average bill in this area = £208 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	2%	1%	0%	2%	2%	0%	4%	0%	1%	6%	0%	0%	0%	0%	0%	2%	3%	3%	0%	2%
Very dissatisfied	6%	5%	7%	0%	7%	4%	6%	5%	5%	7%	9%	5%	21%	7%	8%	5%	0%	6%	8%	2%	8%
Fairly dissatisfied	6%	8%	4%	0%	4%	11%	4%	10%	5%	4%	7%	6%	0%	7%	7%	2%	13%	4%	8%	3%	8%
Neither satisfied nor dissatisfied	9%	9%	8%	8%	10%	10%	3%	10%	10%	6%	7%	9%	0%	6%	5%	5%	8%	11%	10%	6%	10%
Fairly satisfied	34%	34%	34%	50%	39%	31%	27%	26%	37%	38%	31%	35%	22%	38%	31%	36%	26%	36%	40%	40%	24%
Very satisfied	37%	35%	40%	24%	35%	33%	51%	36%	34%	42%	35%	38%	40%	37%	40%	49%	44%	33%	26%	39%	43%
Extremely satisfied	6%	6%	6%	18%	2%	8%	8%	9%	6%	3%	6%	6%	17%	5%	7%	3%	7%	7%	5%	9%	5%
Dont know/cant say	0%	0%	0%	0%	0%	1%	1%	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	3%	3%	0%	4%	1%	2%	2%	1%	5%	3%	3%	0%	4%	3%	0%	0%	3%	1%	4%	3%
Very poor value	5%	6%	5%	0%	5%	7%	4%	3%	6%	7%	8%	5%	0%	6%	8%	3%	4%	5%	4%	2%	10%
Fairly poor value	12%	11%	14%	24%	11%	9%	19%	15%	9%	14%	11%	13%	21%	20%	5%	14%	6%	12%	9%	17%	11%
Neither poor nor good value	19%	17%	22%	26%	19%	20%	17%	19%	21%	18%	18%	20%	17%	18%	18%	19%	27%	18%	23%	17%	18%
Fairly good value	41%	44%	38%	41%	46%	38%	37%	35%	46%	41%	32%	43%	40%	35%	57%	39%	38%	41%	48%	40%	36%
Very good value	13%	14%	12%	0%	9%	16%	18%	16%	13%	11%	25%	10%	0%	13%	5%	20%	16%	13%	13%	12%	15%
Extremely good value	3%	2%	5%	0%	2%	6%	1%	6%	3%	2%	2%	4%	0%	1%	1%	3%	5%	5%	1%	5%	3%
Dont know/cant say	3%	4%	2%	9%	3%	3%	1%	5%	1%	2%	1%	3%	22%	3%	2%	3%	5%	2%	1%	3%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO <u>MAINTAIN</u> CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	96%	96%	97%	91%	93%	98%	100%	96%	95%	99%	98%	96%	78%	99%	95%	89%	94%	98%	98%	98%	94%
Ensuring a reliable & continuous water supply	98%	99%	97%	100%	97%	99%	99%	97%	98%	99%	97%	98%	100%	98%	98%	95%	93%	100%	97%	99%	98%
Ensuring the safety of tap water	98%	97%	98%	100%	97%	98%	98%	96%	97%	100%	98%	98%	100%	99%	100%	94%	92%	99%	97%	98%	98%
Managing the appearance, taste & smell of tap water	94%	95%	94%	100%	93%	93%	96%	94%	95%	93%	95%	94%	100%	94%	93%	94%	92%	95%	93%	98%	92%
Managing the pressure of water in your taps & the number of unplanned interruptions	92%	94%	91%	91%	89%	93%	97%	94%	92%	91%	94%	92%	78%	94%	90%	91%	90%	93%	92%	94%	90%
Handling customers' accounts, queries, complaints & customers with special needs	84%	85%	82%	83%	77%	87%	89%	84%	84%	82%	89%	82%	79%	88%	89%	72%	89%	81%	85%	84%	83%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	91%	89%	93%	91%	92%	87%	96%	85%	92%	96%	88%	92%	100%	97%	97%	91%	88%	89%	76%	97%	97%
Avoid the risk of homes & gardens being flooded with sewerage	93%	90%	95%	100%	94%	89%	95%	87%	93%	97%	90%	93%	100%	97%	97%	94%	87%	91%	81%	98%	96%
Managing the amount of water taken from the environment to supply customers	88%	85%	91%	91%	88%	86%	91%	84%	90%	90%	85%	89%	78%	95%	93%	85%	85%	85%	77%	96%	91%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	89%	89%	89%	91%	88%	87%	92%	86%	91%	89%	91%	88%	78%	90%	93%	82%	92%	88%	79%	91%	94%
No of respondents	402	200	201	10	157	149	83	119	148	135	81	316	4	79	50	35	53	185	112	130	152

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	85%	84%	86%	66%	82%	86%	90%	85%	82%	88%	87%	85%	61%	84%	85%	63%	82%	90%	84%	86%	83%
Ensuring a reliable & continuous water supply	86%	84%	88%	75%	83%	87%	90%	83%	83%	91%	87%	86%	61%	88%	87%	69%	79%	89%	82%	90%	83%
Ensuring the safety of tap water	89%	88%	91%	83%	89%	88%	93%	86%	87%	95%	88%	90%	83%	91%	88%	80%	80%	93%	86%	94%	87%
Managing the appearance, taste & smell of tap water	89%	87%	91%	100%	88%	87%	94%	92%	87%	90%	88%	90%	83%	88%	90%	80%	93%	91%	87%	92%	89%
Managing the pressure of water in your taps & the number of unplanned interruptions	82%	81%	83%	75%	79%	85%	86%	82%	80%	84%	81%	83%	61%	80%	80%	77%	74%	87%	78%	88%	79%
Handling customers' accounts, queries, complaints & customers with special needs	68%	66%	69%	49%	67%	69%	71%	73%	63%	69%	79%	65%	40%	71%	66%	41%	66%	73%	77%	66%	65%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	85%	83%	88%	75%	86%	83%	89%	76%	86%	93%	86%	86%	61%	90%	90%	79%	74%	87%	75%	95%	83%
Avoid the risk of homes & gardens being flooded with sewerage	84%	83%	86%	75%	85%	84%	86%	76%	86%	91%	84%	85%	61%	88%	86%	79%	77%	86%	69%	96%	84%
Managing the amount of water taken from the environment to supply customers	83%	81%	85%	75%	86%	81%	82%	77%	82%	89%	76%	85%	61%	90%	85%	76%	73%	84%	69%	92%	87%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	83%	84%	82%	75%	81%	85%	83%	78%	84%	86%	84%	83%	61%	86%	81%	70%	83%	85%	72%	86%	87%
No of respondents	386	194	192	10	152	145	77	118	141	127	78	305	4	71	48	35	52	181	101	130	148

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	59%	58%	61%	42%	57%	61%	64%	57%	56%	65%	52%	62%	21%	62%	54%	52%	55%	62%	61%	59%	59%
Ensuring a reliable & continuous water supply	64%	60%	67%	42%	62%	67%	64%	62%	58%	71%	52%	67%	21%	69%	64%	61%	61%	62%	57%	67%	68%
Ensuring the safety of tap water	74%	72%	75%	67%	75%	74%	72%	74%	71%	77%	68%	75%	43%	80%	73%	81%	79%	68%	60%	80%	78%
Managing the appearance, taste & smell of tap water	68%	66%	71%	59%	72%	67%	68%	73%	64%	69%	65%	70%	43%	72%	70%	78%	68%	65%	62%	77%	69%
Managing the pressure of water in your taps & the number of unplanned interruptions	64%	61%	68%	60%	63%	67%	64%	64%	60%	69%	58%	67%	21%	74%	61%	63%	67%	61%	53%	67%	71%
Handling customers' accounts, queries, complaints & customers with special needs	59%	56%	61%	59%	58%	59%	59%	61%	53%	63%	54%	61%	0%	66%	57%	61%	60%	55%	52%	61%	63%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	64%	59%	67%	68%	61%	65%	67%	63%	62%	65%	59%	65%	43%	65%	67%	60%	67%	62%	59%	67%	64%
Avoid the risk of homes & gardens being flooded with sewerage	61%	56%	66%	59%	59%	64%	61%	56%	63%	63%	53%	63%	21%	63%	62%	63%	54%	61%	53%	68%	61%
Managing the amount of water taken from the environment to supply customers	55%	48%	62%	59%	56%	53%	58%	54%	56%	56%	42%	59%	21%	57%	51%	58%	51%	56%	50%	61%	56%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	53%	49%	57%	51%	54%	52%	54%	58%	52%	51%	45%	56%	21%	48%	39%	55%	51%	59%	53%	51%	57%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	59%	57%	61%	51%	56%	59%	67%	52%	56%	69%	51%	62%	21%	67%	57%	50%	48%	61%	61%	59%	58%
Ensuring a reliable & continuous water supply	66%	64%	68%	60%	65%	67%	67%	61%	60%	76%	57%	69%	21%	75%	67%	60%	64%	63%	58%	69%	70%
Ensuring the safety of tap water	73%	71%	74%	85%	72%	71%	75%	72%	68%	78%	69%	74%	43%	80%	75%	79%	71%	68%	63%	79%	75%
Managing the appearance, taste & smell of tap water	67%	67%	67%	76%	69%	65%	69%	67%	65%	70%	64%	68%	43%	75%	74%	75%	64%	62%	59%	77%	67%
Managing the pressure of water in your taps & the number of unplanned interruptions	62%	61%	63%	51%	62%	63%	63%	60%	58%	68%	56%	64%	21%	75%	61%	58%	57%	59%	53%	66%	67%
Handling customers' accounts, queries, complaints & customers with special needs	56%	56%	56%	51%	56%	57%	59%	54%	51%	64%	49%	59%	0%	64%	59%	56%	48%	55%	53%	63%	55%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	59%	54%	64%	68%	56%	58%	66%	56%	59%	62%	56%	60%	43%	62%	63%	55%	51%	59%	58%	65%	54%
Avoid the risk of homes & gardens being flooded with sewerage	57%	52%	62%	59%	55%	56%	61%	51%	55%	63%	50%	59%	21%	61%	56%	55%	45%	59%	53%	64%	54%
Managing the amount of water taken from the environment to supply customers	50%	45%	55%	59%	50%	47%	56%	49%	48%	54%	43%	52%	21%	50%	45%	45%	38%	56%	52%	46%	53%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	51%	48%	54%	51%	52%	48%	56%	53%	48%	53%	43%	53%	21%	49%	37%	50%	42%	59%	55%	49%	51%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	61%	59%	63%	51%	57%	64%	65%	56%	56%	71%	53%	63%	21%	70%	56%	47%	53%	64%	63%	57%	62%
Ensuring a reliable & continuous water supply	67%	65%	69%	60%	65%	70%	67%	64%	62%	75%	60%	69%	21%	77%	66%	60%	66%	64%	57%	67%	75%
Ensuring the safety of tap water	72%	72%	73%	68%	72%	73%	75%	70%	69%	78%	68%	74%	43%	83%	75%	76%	74%	66%	61%	80%	74%
Managing the appearance, taste & smell of tap water	68%	67%	69%	59%	70%	67%	68%	74%	63%	69%	63%	70%	43%	77%	68%	75%	69%	63%	62%	76%	68%
Managing the pressure of water in your taps & the number of unplanned interruptions	62%	61%	63%	50%	62%	65%	61%	60%	58%	70%	57%	64%	21%	78%	61%	58%	61%	57%	52%	65%	68%
Handling customers' accounts, queries, complaints & customers with special needs	57%	57%	57%	42%	57%	59%	56%	57%	50%	65%	53%	59%	0%	68%	60%	56%	50%	54%	53%	63%	57%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	60%	57%	64%	60%	59%	61%	64%	56%	59%	65%	61%	60%	43%	64%	62%	55%	52%	61%	63%	64%	55%
Avoid the risk of homes & gardens being flooded with sewerage	57%	54%	60%	59%	55%	59%	59%	55%	55%	62%	51%	60%	21%	61%	61%	55%	40%	60%	54%	62%	57%
Managing the amount of water taken from the environment to supply customers	50%	47%	53%	50%	50%	48%	54%	50%	46%	54%	43%	52%	21%	53%	37%	45%	50%	53%	53%	44%	53%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	50%	48%	52%	42%	51%	48%	52%	51%	48%	52%	44%	52%	21%	50%	35%	50%	45%	55%	55%	45%	51%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	4%
Ensuring a reliable & continuous water supply	4%
Ensuring the safety of tap water	12%
Managing the appearance, taste & smell of tap water	10%
Managing the pressure of water in your taps & the number of unplanned interruptions	7%
Handling customers' accounts, queries, complaints & customers with special needs	3%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	7%
Avoid the risk of homes & gardens being flooded with sewerage	4%
Managing the amount of water taken from the environment to supply customers	4%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	6%
Upgrade water pipes	3%
(further) reduce sewerage drainage problems	3%
Introduce option of having a water meter	1%
(further) reduce sewerage treatment works smells	1%
Reduce chemical treatments in water supply	1%
Speed up process of repairs	1%
No, none	67%
No of respondents	402

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	7%	4%	0%	6%	3%	10%	3%	5%	8%	8%	5%	0%	8%	8%	0%	2%	6%	9%	3%	5%
Very poor value	8%	11%	6%	0%	7%	11%	8%	9%	9%	8%	6%	9%	21%	8%	11%	8%	2%	10%	4%	8%	11%
Fairly poor value	12%	12%	13%	9%	14%	12%	12%	11%	15%	11%	12%	13%	0%	15%	8%	16%	12%	12%	7%	20%	10%
Neither poor nor good value	17%	16%	18%	9%	19%	18%	13%	18%	20%	13%	15%	18%	0%	11%	16%	19%	18%	19%	17%	19%	15%
Fairly good value	39%	40%	38%	57%	39%	38%	38%	33%	40%	44%	34%	41%	0%	45%	41%	48%	41%	34%	47%	39%	33%
Very good value	13%	10%	15%	26%	12%	13%	12%	23%	10%	8%	16%	11%	62%	6%	10%	9%	22%	14%	11%	7%	19%
Extremely good value	1%	1%	2%	0%	2%	2%	1%	2%	0%	2%	0%	2%	0%	1%	0%	0%	2%	2%	0%	2%	2%
Dont know/cant say	3%	4%	3%	0%	2%	4%	6%	2%	1%	7%	9%	2%	17%	6%	7%	0%	0%	3%	5%	1%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	201	10	158	149	83	119	149	134	81	316	4	80	50	35	53	184	111	130	153

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	7%	9%	5%	0%	7%	7%	10%	6%	5%	11%	13%	6%	0%	10%	4%	3%	4%	9%	12%	4%	7%
Very poor value	8%	10%	6%	0%	8%	10%	6%	6%	9%	8%	7%	8%	21%	8%	11%	5%	4%	9%	4%	8%	11%
Fairly poor value	15%	13%	16%	9%	14%	14%	19%	16%	16%	12%	11%	16%	0%	15%	10%	16%	16%	16%	10%	20%	15%
Neither poor nor good value	15%	13%	16%	9%	17%	14%	13%	14%	18%	12%	17%	14%	0%	15%	16%	16%	12%	15%	13%	19%	12%
Fairly good value	39%	40%	39%	66%	36%	42%	35%	37%	40%	40%	38%	40%	22%	35%	44%	49%	41%	37%	52%	35%	33%
Very good value	11%	11%	11%	17%	15%	8%	10%	15%	9%	10%	10%	12%	0%	12%	5%	12%	16%	11%	6%	10%	16%
Extremely good value	2%	1%	3%	0%	2%	2%	1%	3%	1%	2%	1%	2%	0%	1%	0%	0%	4%	2%	1%	1%	3%
Dont know/cant say	3%	3%	3%	0%	1%	4%	6%	2%	2%	5%	3%	2%	57%	4%	10%	0%	2%	2%	2%	3%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	9%	12%	6%	0%	8%	7%	14%	6%	8%	13%	14%	8%	0%	14%	4%	3%	4%	10%	13%	6%	8%
Very poor value	10%	10%	10%	0%	12%	11%	6%	13%	9%	9%	8%	10%	21%	9%	14%	8%	9%	10%	6%	12%	11%
Fairly poor value	13%	11%	15%	17%	10%	13%	18%	15%	14%	9%	14%	13%	0%	9%	13%	17%	10%	15%	8%	20%	11%
Neither poor nor good value	16%	16%	17%	9%	17%	16%	16%	13%	20%	14%	16%	16%	0%	19%	14%	18%	21%	14%	12%	22%	14%
Fairly good value	37%	36%	38%	56%	39%	36%	32%	32%	38%	41%	34%	38%	22%	36%	40%	42%	37%	36%	52%	29%	33%
Very good value	10%	12%	8%	18%	11%	9%	9%	15%	8%	7%	11%	10%	0%	9%	5%	12%	13%	10%	8%	5%	16%
Extremely good value	2%	1%	3%	0%	3%	2%	0%	3%	1%	2%	0%	2%	0%	0%	0%	0%	5%	3%	1%	2%	2%
Dont know/cant say	3%	2%	4%	0%	1%	4%	5%	3%	2%	5%	3%	3%	57%	4%	10%	0%	2%	2%	1%	4%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	201	10	158	149	83	119	149	134	81	316	4	79	50	35	53	185	112	130	152

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	17%	22%	12%	0%	16%	18%	20%	11%	17%	22%	25%	15%	17%	24%	15%	19%	12%	16%	15%	17%	18%
Probably not willing to pay	17%	16%	18%	24%	18%	17%	14%	18%	16%	17%	15%	17%	0%	18%	17%	11%	11%	19%	13%	21%	16%
Probably willing to pay	44%	40%	49%	32%	44%	47%	41%	47%	47%	40%	46%	45%	0%	37%	45%	53%	46%	45%	57%	44%	35%
Definitely willing to pay	18%	18%	18%	44%	18%	16%	18%	21%	15%	19%	13%	19%	62%	18%	18%	12%	31%	16%	12%	13%	28%
Dont know/Cant say	4%	3%	4%	0%	4%	3%	6%	2%	5%	3%	1%	4%	21%	3%	5%	5%	0%	4%	3%	5%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	8%	8%	7%	0%	3%	14%	7%	12%	5%	7%	9%	7%	0%	6%	0%	0%	0%	13%	15%	9%	2%
Cost too much for improvement	55%	57%	53%	100%	66%	52%	38%	59%	60%	49%	49%	58%	0%	48%	67%	51%	73%	54%	30%	68%	59%
Cant afford it	30%	27%	34%	0%	25%	24%	51%	19%	28%	39%	35%	28%	100%	45%	23%	49%	10%	25%	49%	15%	32%
Too much & cant afford it	2%	3%	0%	0%	3%	0%	2%	0%	1%	3%	0%	2%	0%	2%	10%	0%	0%	0%	0%	4%	0%
Dont know/Cant say	5%	5%	6%	0%	2%	10%	3%	10%	6%	2%	6%	5%	0%	0%	0%	0%	17%	8%	6%	4%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	135	76	59	2	53	50	29	35	48	51	33	101	1	33	16	10	12	64	31	49	52

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	15%	20%	10%	0%	13%	15%	20%	9%	14%	20%	22%	13%	17%	22%	14%	16%	6%	14%	14%	16%	14%
Probably not willing to pay	19%	16%	22%	24%	20%	21%	14%	21%	19%	18%	20%	19%	0%	22%	24%	8%	19%	19%	12%	19%	26%
Probably willing to pay	45%	41%	48%	34%	45%	46%	41%	44%	48%	42%	42%	45%	22%	39%	44%	50%	48%	45%	56%	48%	31%
Definitely willing to pay	18%	19%	16%	42%	18%	15%	19%	23%	14%	17%	15%	18%	0%	15%	13%	18%	27%	17%	14%	10%	27%
Dont know/Cant say	4%	4%	4%	0%	4%	3%	6%	4%	6%	3%	1%	4%	61%	3%	6%	8%	0%	5%	3%	7%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	9%	8%	10%	0%	3%	18%	3%	18%	6%	5%	11%	8%	0%	3%	0%	0%	0%	18%	20%	8%	4%
Cost too much for improvement	56%	58%	53%	36%	73%	47%	42%	52%	65%	50%	54%	57%	0%	43%	63%	78%	82%	52%	28%	71%	59%
Cant afford it	30%	29%	32%	64%	18%	27%	55%	23%	23%	42%	32%	29%	100%	54%	21%	22%	10%	26%	49%	16%	31%
Too much & cant afford it	1%	2%	0%	0%	3%	0%	0%	0%	0%	3%	0%	2%	0%	0%	9%	0%	0%	0%	0%	4%	0%
Dont know/Cant say	4%	3%	5%	0%	2%	8%	0%	7%	6%	0%	3%	4%	0%	0%	6%	0%	7%	5%	3%	2%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	132	71	61	2	50	51	28	34	47	50	34	98	1	33	18	9	12	61	29	44	58

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	18%	22%	14%	0%	15%	19%	23%	16%	15%	22%	21%	17%	17%	25%	15%	17%	9%	18%	16%	22%	16%
Probably not willing to pay	18%	18%	19%	33%	18%	19%	18%	20%	18%	18%	21%	18%	0%	16%	28%	9%	21%	18%	10%	24%	21%
Probably willing to pay	40%	39%	41%	25%	42%	42%	35%	33%	49%	37%	35%	42%	22%	39%	42%	50%	37%	40%	56%	38%	29%
Definitely willing to pay	19%	20%	19%	42%	21%	17%	18%	28%	14%	18%	21%	19%	0%	15%	10%	19%	30%	21%	15%	11%	30%
Dont know/Cant say	4%	2%	6%	0%	4%	3%	6%	3%	4%	4%	2%	4%	61%	5%	6%	5%	2%	3%	3%	5%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	7%	8%	6%	0%	4%	10%	8%	10%	6%	7%	7%	7%	0%	6%	0%	11%	0%	11%	17%	10%	0%
Cost too much for improvement	57%	55%	60%	53%	71%	55%	38%	62%	66%	45%	52%	59%	0%	44%	62%	55%	92%	54%	32%	66%	62%
Cant afford it	31%	32%	30%	47%	19%	29%	53%	23%	24%	45%	38%	29%	100%	48%	25%	34%	8%	30%	48%	17%	36%
Too much & cant afford it	2%	3%	0%	0%	3%	0%	2%	0%	1%	3%	0%	2%	0%	2%	8%	0%	0%	0%	0%	4%	0%
Dont know/Cant say	3%	2%	3%	0%	2%	5%	0%	5%	4%	0%	3%	3%	0%	0%	5%	0%	0%	4%	3%	4%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	144	78	66	3	52	55	33	42	49	53	34	109	1	32	21	9	15	67	29	59	55

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	14%	16%	11%	9%	12%	15%	13%	11%	14%	16%	14%	14%	17%	11%	19%	11%	13%	14%	12%	15%	14%
Not very concerned	37%	39%	34%	26%	33%	35%	49%	29%	36%	44%	33%	38%	22%	48%	35%	32%	36%	33%	34%	38%	37%
Fairly concerned	25%	20%	30%	24%	29%	22%	22%	36%	24%	16%	30%	24%	40%	21%	20%	39%	28%	24%	34%	21%	23%
Very concerned	14%	15%	13%	25%	13%	18%	6%	17%	15%	10%	16%	13%	21%	4%	15%	12%	13%	19%	14%	12%	16%
Dont know/cant say	11%	10%	12%	17%	12%	10%	10%	7%	11%	14%	7%	12%	0%	17%	11%	5%	11%	10%	7%	15%	11%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	3%	3%	4%	0%	4%	4%	2%	6%	2%	2%	2%	4%	0%	2%	0%	4%	7%	4%	3%	5%	2%
Ensuring a reliable & continuous water supply	5%	5%	6%	9%	5%	6%	3%	6%	5%	5%	4%	6%	0%	3%	3%	3%	5%	7%	6%	5%	5%
Ensuring the safety of tap water	19%	16%	21%	34%	19%	21%	12%	27%	17%	13%	20%	18%	0%	6%	14%	14%	21%	26%	19%	16%	21%
Managing the appearance, taste & smell of tap water	9%	8%	11%	15%	11%	9%	5%	13%	7%	8%	12%	8%	21%	9%	8%	12%	8%	9%	12%	7%	9%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%	2%	1%	0%	2%	2%	0%	2%	2%	0%	0%	2%	0%	0%	2%	0%	0%	3%	3%	1%	1%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	8%	6%	10%	9%	8%	9%	9%	14%	8%	4%	10%	8%	0%	3%	7%	6%	13%	10%	13%	7%	6%
Avoid the risk of homes & gardens being flooded with sewerage	2%	2%	3%	0%	2%	3%	2%	2%	2%	2%	3%	2%	0%	4%	2%	6%	0%	2%	2%	3%	2%
Managing the amount of water taken from the environment to supply customers	3%	2%	4%	0%	3%	4%	1%	7%	1%	1%	2%	3%	0%	2%	2%	3%	5%	3%	4%	3%	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%	3%	3%	0%	4%	3%	2%	8%	1%	0%	1%	3%	0%	0%	3%	7%	5%	3%	2%	4%	2%
No of respondents	402	200	202	10	158	149	83	119	149	135	81	317	4	80	50	35	53	185	112	130	153

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	10%	12%	9%	17%	10%	11%	8%	14%	10%	6%	5%	11%	0%	7%	4%	9%	9%	14%	9%	12%	9%
Bills show one big change in first year	8%	8%	8%	25%	7%	6%	14%	5%	5%	14%	9%	7%	40%	9%	14%	3%	7%	8%	8%	6%	11%
Bills change steadily every year	82%	80%	83%	58%	83%	84%	78%	81%	85%	79%	85%	81%	60%	85%	81%	88%	84%	79%	83%	82%	80%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	397	197	200	10	156	147	82	117	148	132	81	312	4	79	48	35	53	182	112	128	150

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£7)	Maintain current service (£7)	Maintain current service (£6)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£8)	Maintain current service (£7)	Maintain current service (£6)
	3. Ensuring the safety of tap water	Meet current and future standards at 38 of treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 119,760 of water company lead pipes replaced to meet new lead standard (£4)	Meet current and future standards at 38 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 205,338 of water company lead pipes replaced to meet new lead stand (£4)	Meet current and future standards at 4 of treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 352,683 of water company lead pipes replaced to meet new lead standard (£5)
	4. Managing the appearance, taste and smell of tap water	4% fewer customer complaints about the appearance, taste or smell of tap water (£1)	4% fewer customer complaints about the appearance, taste or smell of tap water (£1)	4% fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£12)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£11)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£11)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 793 to 697. Reduce the number of properties externally flooding from sewers by 753. (£1)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£1)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£2)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	40 Km of rivers can better support fish and rare wildlife,1 wetlands/lake restored and protected to support rare wildlife (£2)	35 Km of rivers can better support fish and rare wildlife, 4 wetlands and lakes are restored and protected to support rare wildlife (£1)	256 Km of rivers can better support fish and rare wildlife, 5 wetlands and lakes are restored and protected to support rare wildlife (£2)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	650 Km of rivers can better support fish, 126 Km of rivers can support rare wildlife, 1 wetland and 9 lakes are improved and can support rare wildlife (£8)	423 Km of rivers can better support fish, 126 Km of rivers can support rare wildlife, 1 wetlands and 9 lakes are improved and can support rare wildlife (£6)	1,073 Km of rivers can better support fish, 126 Km of rivers can support rare wildlife, 1 wetlands and 9 lakes are improved and can support rare wildlife (£12)
		Overall cost on average bill taking account of cost savings by 2010 is £37 (excluding inflation). Overall bill by 2010 is £248 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £31 (excluding inflation). Overall bill by 2010 is £241 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £39 (excluding inflation). Overall bill by 2010 is £249 (plus inflation)

1. Key Findings

South Staffordshire Water is a water supply only company providing water services to 1.2 million customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £31
Reference Plan A - £25
Reference Plan B - £32

☐ 80% of customers indicated that they were satisfied with the service provided by South Staffordshire Water with 57% saying that this service was good value for money. 13% expressed dissatisfaction with the service and 23% of customers regard the service as poor value for money.

☐ Customers thought it most important to maintain the 'safety of tap water' (98%) and 'manage the appearance, taste and smell of tap water' (97%). Between 91% and 93% of customers thought it important to maintain all other services. Customers thought it most important for improvements to 'managing the appearance taste and smell of tap water' (91%) and 'ensuring the safety of tap water' (83%) to be introduced by 2010. Least importance was attached to improvements to 'manage the amount of water taken from the environment to supply customers' (69%).

☐ Customer support for all three company plans was high, particularly for Reference Plan A. Across all three plans, (each of which proposed a combination of maintained and improved services) the proposed outputs customers would most like to see are those to 'ensure a reliable and continuous water supply' (78% - 82%), followed by those to 'maintain sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells for sewage works' (73%-74%), 'ensuring the safety of tap water (72%-75%) and 'maintaining water pipes, treatment works and reservoirs' (70%-74%). 'Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' was ranked as the lowest priority within each plan, with customer support ranging from 61% for Reference Plan B, 62% for the Company Preferred Plan and 64% for Reference Plan A.

☐ 66% of customers expressed the view that there was no area of service requiring improvement beyond proposals in the plans. Where customers did express a view that further improvements were needed, they were most likely to identify 'ensuring the safety of tap water' (16%), 'managing the appearance, taste and smell of tap water' (12%) and 'managing the pressure of water in taps and the number of unplanned interruptions' (10%).

☐ The Company Preferred Plan and Reference Plan A were regarded as good value for money by 63% and 60% of customers respectively. 52% of customers thought Reference Plan B represented good value for money. The proportion of customers considering the plans poor value for money were 20% for the Company Preferred Plan, 22% for Reference Plan A and 25% for Reference Plan B.

☐ 76% and 74% of customers (respectively) indicated that they would be willing to pay for the Company Preferred Plan (57% probably willing, 19% definitely willing) and Reference Plan A (58% probably willing, 16% definitely willing). Slightly fewer (68%) reported a willingness to pay for Reference Plan B (56% probably willing, 12% definitely willing). Likewise, about one quarter (23%-24%) of customers reported that they would not be willing to pay for the Company Preferred Plan (15% probably not willing, 8% definitely not willing) and Reference Plan A (15% probably not willing, 9% definitely not willing) and slightly more (30%) were unwilling to pay for Reference Plan B (18% probably not willing, 12% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, 23% said that this was because they can't afford the Company Preferred Plan, and because the 'cost was too much for the improvements' (34% Reference Plan A and 36% Reference Plan B). Between 9% and 10% of all South Staffordshire water customers indicated that they could not afford the bill increases set out in the proposed company plans (9% for Reference Plan A and 10% for the Company Preferred Plan and Reference Plan B).

☐ 48% of customers said that they would not be concerned if some improvements had to be delayed, and 38% said they would be concerned by any delay. Amongst those customers who expressed concern, it was apparent that delays to 'ensuring the safety of tap water' was the one area of service that would cause greatest concern if delayed (21%). 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 71% of South Staffordshire Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three improvements customers most wanted to see were 'ensuring the safety of tap water' (at a cost of £1/annum), 'managing the appearance, taste and smell of tap water' (at no extra cost), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£11-£12/annum).

2. Introduction

The attitudes and preferences of South Staffordshire Water customers, reported in section 3, are based on a sample of 201 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.92% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 2,213 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	76 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.7% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	935 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	5 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	85% of rivers are of good, 9% fair and 6% poor quality.79% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £188 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	1%	0%	0%	0%	1%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	0%	1%	5%	0%	0%
Very dissatisfied	2%	2%	2%	0%	0%	1%	10%	3%	3%	0%	0%	2%	0%	1%	0%	0%	0%	4%	4%	0%	4%
Fairly dissatisfied	10%	14%	7%	0%	9%	13%	5%	15%	6%	12%	20%	9%	0%	8%	12%	8%	0%	13%	20%	4%	17%
Neither satisfied nor dissatisfied	8%	8%	8%	100%	3%	8%	13%	14%	5%	6%	17%	7%	0%	7%	10%	0%	5%	9%	10%	3%	15%
Fairly satisfied	46%	38%	54%	0%	52%	48%	30%	45%	54%	39%	30%	48%	0%	45%	42%	52%	54%	46%	51%	51%	37%
Very satisfied	24%	26%	21%	0%	21%	20%	38%	17%	19%	32%	19%	24%	0%	28%	26%	8%	37%	20%	6%	29%	18%
Extremely satisfied	10%	11%	8%	0%	14%	8%	5%	3%	13%	11%	13%	9%	0%	10%	9%	32%	4%	8%	4%	12%	7%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	5%	0%	0%	3%	3%	0%	2%	3%	3%	5%	2%	0%	3%	3%	0%	0%	3%	5%	3%	1%
Very poor value	6%	6%	6%	0%	6%	4%	13%	10%	5%	4%	11%	6%	0%	3%	4%	0%	18%	6%	0%	4%	13%
Fairly poor value	14%	14%	15%	100%	19%	14%	4%	20%	11%	13%	5%	15%	0%	16%	14%	0%	18%	15%	0%	10%	27%
Neither poor nor good value	17%	11%	23%	0%	18%	19%	9%	13%	17%	20%	16%	17%	0%	16%	28%	0%	13%	17%	19%	15%	21%
Fairly good value	38%	42%	34%	0%	35%	39%	43%	32%	49%	32%	44%	37%	0%	39%	28%	46%	14%	44%	57%	46%	18%
Very good value	15%	16%	15%	0%	11%	16%	23%	15%	13%	18%	20%	15%	0%	13%	19%	29%	27%	11%	19%	16%	11%
Extremely good value	4%	5%	3%	0%	4%	3%	7%	4%	3%	6%	0%	5%	0%	9%	0%	15%	10%	1%	0%	5%	4%
Dont know/cant say	2%	1%	3%	0%	3%	2%	0%	4%	0%	3%	0%	2%	0%	0%	4%	11%	0%	2%	0%	1%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	93%	92%	93%	100%	89%	98%	84%	100%	91%	89%	84%	94%	0%	80%	95%	85%	100%	96%	100%	95%	85%
Ensuring a reliable & continuous water supply	92%	90%	94%	100%	94%	93%	84%	96%	91%	89%	90%	92%	0%	79%	98%	89%	95%	95%	100%	96%	82%
Ensuring the safety of tap water	98%	98%	97%	100%	97%	99%	95%	98%	97%	97%	87%	99%	0%	93%	98%	100%	95%	99%	100%	99%	94%
Managing the appearance, taste & smell of tap water	97%	98%	96%	100%	95%	96%	100%	98%	99%	93%	94%	97%	0%	90%	100%	89%	95%	99%	100%	98%	93%
Managing the pressure of water in your taps & the number of unplanned interruptions	93%	91%	95%	100%	95%	93%	86%	96%	95%	88%	91%	93%	0%	79%	96%	89%	95%	96%	100%	97%	82%
Handling customers' accounts, queries, complaints & customers with special needs	93%	94%	93%	100%	89%	96%	93%	98%	89%	93%	94%	93%	0%	89%	92%	80%	91%	96%	100%	96%	85%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	92%	92%	93%	100%	93%	98%	76%	96%	92%	90%	87%	93%	0%	84%	88%	94%	95%	95%	100%	92%	89%
Avoid the risk of homes & gardens being flooded with sewerage	93%	94%	92%	100%	93%	98%	82%	100%	93%	88%	87%	94%	0%	82%	88%	94%	100%	96%	100%	94%	89%
Managing the amount of water taken from the environment to supply customers	91%	91%	92%	100%	93%	94%	79%	96%	90%	88%	87%	92%	0%	82%	85%	85%	95%	95%	100%	95%	81%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	92%	91%	92%	100%	93%	94%	83%	96%	91%	89%	87%	92%	0%	82%	90%	80%	95%	95%	100%	96%	81%
No of respondents	197	97	100	1	67	95	35	56	69	73	19	178	0	35	24	11	21	107	23	105	64

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	74%	74%	74%	100%	71%	76%	76%	71%	78%	73%	73%	74%	0%	78%	81%	68%	55%	76%	96%	83%	50%
Ensuring a reliable & continuous water supply	73%	71%	75%	100%	73%	72%	75%	66%	76%	76%	82%	72%	0%	80%	79%	68%	50%	74%	96%	83%	45%
Ensuring the safety of tap water	83%	85%	81%	100%	79%	83%	92%	82%	86%	82%	86%	83%	0%	86%	85%	74%	69%	85%	100%	87%	69%
Managing the appearance, taste & smell of tap water	91%	91%	91%	100%	85%	91%	100%	86%	94%	90%	86%	91%	0%	92%	100%	81%	71%	93%	100%	90%	85%
Managing the pressure of water in your taps & the number of unplanned interruptions	77%	77%	76%	0%	74%	75%	88%	69%	82%	77%	89%	75%	0%	75%	80%	83%	51%	80%	96%	86%	50%
Handling customers' accounts, queries, complaints & customers with special needs	72%	70%	73%	0%	65%	75%	79%	73%	71%	72%	81%	71%	0%	82%	64%	63%	60%	74%	96%	79%	47%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	77%	76%	78%	0%	74%	79%	78%	69%	78%	81%	77%	76%	0%	83%	84%	74%	59%	77%	100%	82%	55%
Avoid the risk of homes & gardens being flooded with sewerage	71%	71%	71%	0%	68%	73%	73%	71%	76%	66%	77%	70%	0%	65%	75%	56%	55%	76%	96%	78%	48%
Managing the amount of water taken from the environment to supply customers	69%	69%	69%	0%	68%	70%	70%	66%	72%	69%	74%	68%	0%	75%	65%	48%	50%	74%	96%	78%	40%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	72%	72%	72%	0%	73%	72%	74%	66%	75%	75%	78%	72%	0%	84%	71%	48%	50%	76%	96%	82%	44%
No of respondents	194	96	97	1	67	93	33	56	68	70	18	175	0	32	24	11	21	106	23	104	60

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	70%	65%	74%	100%	65%	78%	57%	88%	63%	63%	78%	69%	0%	51%	56%	53%	82%	79%	88%	62%	74%
Ensuring a reliable & continuous water supply	78%	75%	81%	100%	70%	87%	70%	92%	69%	76%	74%	78%	0%	76%	67%	62%	91%	81%	92%	78%	72%
Ensuring the safety of tap water	72%	69%	75%	100%	71%	77%	59%	95%	67%	59%	72%	72%	0%	40%	58%	45%	96%	84%	96%	68%	66%
Managing the appearance, taste & smell of tap water	71%	68%	73%	100%	64%	79%	62%	90%	58%	69%	69%	71%	0%	55%	59%	45%	81%	80%	92%	64%	71%
Managing the pressure of water in your taps & the number of unplanned interruptions	65%	64%	66%	100%	56%	75%	55%	86%	59%	55%	63%	66%	0%	34%	54%	53%	77%	78%	92%	56%	68%
Handling customers' accounts, queries, complaints & customers with special needs	62%	59%	65%	0%	56%	70%	52%	86%	52%	53%	64%	62%	0%	34%	37%	45%	77%	77%	88%	54%	63%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	73%	71%	75%	100%	71%	79%	60%	86%	67%	68%	74%	73%	0%	56%	58%	53%	95%	80%	96%	72%	65%
Avoid the risk of homes & gardens being flooded with sewerage	66%	65%	68%	0%	64%	75%	50%	86%	59%	58%	66%	66%	0%	41%	52%	53%	86%	76%	92%	56%	71%
Managing the amount of water taken from the environment to supply customers	64%	62%	65%	0%	59%	72%	52%	86%	57%	54%	60%	64%	0%	39%	37%	53%	86%	76%	88%	58%	62%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	62%	60%	65%	0%	58%	69%	54%	83%	54%	55%	56%	63%	0%	33%	46%	45%	86%	74%	88%	56%	60%
No of respondents	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	74%	72%	77%	100%	72%	80%	62%	86%	68%	71%	82%	73%	0%	50%	63%	53%	81%	86%	96%	69%	73%
Ensuring a reliable & continuous water supply	82%	80%	84%	100%	82%	89%	63%	95%	75%	80%	82%	82%	0%	65%	72%	62%	100%	89%	100%	83%	73%
Ensuring the safety of tap water	75%	73%	76%	100%	73%	81%	61%	91%	71%	66%	82%	74%	0%	41%	65%	53%	91%	88%	96%	69%	75%
Managing the appearance, taste & smell of tap water	74%	73%	74%	100%	70%	82%	56%	90%	68%	66%	72%	74%	0%	44%	65%	62%	91%	83%	100%	66%	74%
Managing the pressure of water in your taps & the number of unplanned interruptions	70%	66%	74%	100%	65%	79%	58%	86%	60%	68%	72%	70%	0%	48%	59%	45%	81%	81%	96%	61%	75%
Handling customers' accounts, queries, complaints & customers with special needs	67%	67%	68%	0%	62%	74%	60%	86%	57%	62%	77%	66%	0%	36%	49%	45%	81%	82%	92%	58%	72%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	74%	76%	73%	100%	71%	83%	58%	90%	67%	69%	77%	74%	0%	53%	61%	62%	95%	82%	96%	70%	72%
Avoid the risk of homes & gardens being flooded with sewerage	67%	66%	68%	0%	65%	74%	54%	86%	61%	59%	72%	67%	0%	35%	54%	53%	81%	80%	96%	58%	70%
Managing the amount of water taken from the environment to supply customers	66%	66%	65%	100%	62%	73%	52%	86%	59%	56%	72%	65%	0%	30%	51%	45%	86%	79%	96%	57%	67%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	64%	64%	65%	0%	60%	72%	52%	86%	51%	59%	72%	63%	0%	33%	45%	45%	81%	78%	92%	55%	66%
No of respondents	199	99	100	1	68	95	35	56	70	73	19	180	0	35	27	11	21	106	23	105	66

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	73%	69%	77%	100%	73%	74%	71%	86%	68%	68%	82%	73%	0%	48%	59%	53%	81%	86%	96%	68%	73%
Ensuring a reliable & continuous water supply	80%	80%	81%	100%	76%	87%	71%	90%	74%	79%	82%	80%	0%	65%	76%	62%	95%	86%	96%	81%	73%
Ensuring the safety of tap water	72%	69%	76%	100%	71%	76%	64%	86%	71%	63%	82%	71%	0%	36%	63%	45%	86%	87%	96%	66%	72%
Managing the appearance, taste & smell of tap water	73%	70%	76%	100%	66%	80%	66%	86%	68%	66%	72%	73%	0%	42%	65%	53%	81%	85%	96%	66%	74%
Managing the pressure of water in your taps & the number of unplanned interruptions	70%	68%	71%	100%	60%	78%	63%	86%	60%	66%	72%	69%	0%	42%	62%	45%	81%	81%	93%	61%	74%
Handling customers' accounts, queries, complaints & customers with special needs	65%	64%	67%	0%	60%	71%	60%	86%	57%	58%	77%	64%	0%	30%	53%	45%	81%	79%	89%	56%	71%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	74%	74%	75%	100%	69%	83%	62%	90%	70%	67%	77%	74%	0%	48%	76%	45%	95%	82%	100%	69%	73%
Avoid the risk of homes & gardens being flooded with sewerage	67%	65%	68%	0%	62%	73%	59%	86%	58%	60%	72%	66%	0%	32%	56%	45%	81%	80%	92%	56%	72%
Managing the amount of water taken from the environment to supply customers	66%	66%	67%	0%	60%	74%	59%	86%	56%	61%	72%	66%	0%	32%	53%	45%	86%	80%	92%	57%	72%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	61%	62%	60%	0%	55%	65%	63%	78%	51%	57%	62%	61%	0%	32%	53%	45%	76%	71%	92%	51%	65%
No of respondents	200	99	101	1	68	96	35	56	71	73	19	181	0	35	27	11	21	107	23	106	66

SOUTH STAFFORDSHIRE WATER PLC

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	8%
Ensuring a reliable & continuous water supply	4%
Ensuring the safety of tap water	16%
Managing the appearance, taste & smell of tap water	12%
Managing the pressure of water in your taps & the number of unplanned interruptions	10%
Handling customers' accounts, queries, complaints & customers with special needs	2%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	5%
Avoid the risk of homes & gardens being flooded with sewerage	4%
Managing the amount of water taken from the environment to supply customers	2%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%
Upgrade water pipes	2%
(further) reduce sewerage drainage problems	1%
(further) reduce sewerage treatment works smells	1%
No, none	66%
No of respondents	201

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	3%	4%	0%	5%	4%	0%	3%	1%	6%	0%	4%	0%	0%	3%	0%	9%	5%	0%	2%	8%
Very poor value	8%	13%	3%	0%	3%	10%	11%	14%	4%	7%	14%	7%	0%	10%	6%	0%	9%	8%	5%	4%	16%
Fairly poor value	8%	6%	10%	0%	13%	3%	12%	0%	12%	10%	5%	8%	0%	20%	15%	0%	4%	4%	0%	6%	14%
Neither poor nor good value	17%	19%	16%	0%	16%	19%	15%	19%	14%	19%	16%	17%	0%	7%	20%	19%	14%	20%	10%	16%	21%
Fairly good value	44%	38%	49%	100%	44%	45%	40%	41%	47%	43%	43%	44%	0%	45%	40%	44%	28%	48%	47%	51%	29%
Very good value	13%	16%	10%	0%	13%	14%	12%	13%	17%	9%	19%	13%	0%	8%	16%	17%	27%	11%	22%	17%	5%
Extremely good value	6%	5%	8%	0%	7%	5%	8%	10%	5%	5%	4%	7%	0%	9%	0%	20%	9%	5%	16%	3%	8%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	99	101	1	68	97	35	56	70	74	19	181	0	35	28	11	21	106	23	105	66

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	3%	4%	0%	4%	5%	0%	5%	1%	5%	0%	4%	0%	0%	3%	0%	9%	4%	5%	1%	8%
Very poor value	7%	10%	4%	0%	6%	8%	7%	7%	4%	10%	11%	7%	0%	10%	4%	11%	9%	6%	4%	6%	11%
Fairly poor value	11%	13%	9%	0%	10%	13%	10%	10%	13%	10%	7%	11%	0%	13%	24%	0%	0%	10%	12%	5%	18%
Neither poor nor good value	18%	13%	23%	100%	17%	16%	25%	24%	18%	14%	15%	19%	0%	16%	19%	19%	15%	20%	26%	16%	21%
Fairly good value	36%	39%	33%	0%	26%	44%	36%	26%	36%	44%	45%	35%	0%	44%	25%	30%	27%	39%	22%	47%	22%
Very good value	20%	19%	21%	0%	34%	12%	14%	28%	22%	11%	18%	20%	0%	8%	25%	26%	36%	18%	28%	21%	16%
Extremely good value	4%	3%	5%	0%	4%	3%	8%	0%	6%	5%	4%	4%	0%	9%	0%	14%	4%	3%	4%	4%	5%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	68	96	35	56	71	72	19	181	0	35	28	11	21	105	23	106	65

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	4%	3%	0%	4%	4%	5%	7%	2%	3%	3%	4%	0%	0%	9%	0%	9%	3%	5%	1%	8%
Very poor value	7%	8%	5%	0%	6%	5%	11%	3%	6%	10%	6%	7%	0%	11%	12%	0%	0%	6%	0%	4%	13%
Fairly poor value	14%	11%	16%	0%	7%	18%	16%	22%	9%	12%	5%	15%	0%	14%	11%	8%	23%	13%	20%	8%	19%
Neither poor nor good value	23%	20%	25%	100%	29%	20%	18%	21%	25%	22%	47%	20%	0%	12%	23%	19%	10%	28%	26%	21%	24%
Fairly good value	33%	36%	31%	0%	31%	36%	32%	29%	36%	34%	17%	35%	0%	40%	26%	30%	19%	36%	37%	42%	19%
Very good value	14%	14%	14%	0%	19%	14%	7%	15%	17%	11%	14%	15%	0%	13%	17%	17%	34%	10%	12%	20%	8%
Extremely good value	5%	6%	5%	0%	5%	3%	11%	2%	5%	8%	8%	5%	0%	9%	3%	26%	5%	3%	0%	5%	8%
Don't know/can't say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	68	97	34	55	71	74	19	181	0	35	28	11	19	107	23	105	66

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	8%	11%	6%	0%	4%	10%	12%	9%	6%	11%	12%	8%	0%	9%	5%	0%	9%	10%	0%	3%	21%
Probably not willing to pay	15%	13%	18%	0%	24%	12%	8%	17%	17%	13%	6%	16%	0%	22%	22%	0%	18%	13%	5%	18%	16%
Probably willing to pay	57%	58%	55%	100%	52%	55%	70%	56%	49%	64%	54%	57%	0%	54%	63%	64%	59%	55%	38%	64%	49%
Definitely willing to pay	19%	18%	19%	0%	19%	22%	9%	18%	28%	10%	28%	18%	0%	12%	11%	36%	14%	22%	57%	15%	13%
Dont know/Cant say	1%	0%	1%	0%	0%	1%	0%	0%	0%	2%	0%	1%	0%	3%	0%	0%	0%	0%	0%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	12%	13%	11%	0%	0%	18%	27%	28%	11%	0%	0%	13%	0%	0%	23%	0%	33%	8%	0%	0%	22%
Cost too much for improvements	41%	43%	39%	0%	49%	40%	23%	58%	41%	28%	61%	39%	0%	24%	27%	0%	67%	47%	0%	34%	47%
Cant afford it	48%	44%	51%	0%	51%	43%	51%	14%	48%	72%	39%	48%	0%	76%	49%	0%	0%	45%	0%	66%	31%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	0%	100%	100%	0%	100%	100%
No of respondents	47	22	24	0	19	20	7	13	16	18	3	43	0	11	8	0	6	23	0	22	24

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	10%	9%	0%	10%	9%	9%	12%	8%	9%	28%	8%	0%	5%	12%	0%	9%	11%	5%	4%	21%
Probably not willing to pay	15%	16%	14%	0%	16%	16%	13%	14%	15%	17%	0%	17%	0%	22%	28%	0%	5%	13%	12%	15%	17%
Probably willing to pay	58%	58%	59%	100%	55%	60%	62%	61%	55%	60%	53%	59%	0%	55%	51%	66%	72%	58%	52%	66%	46%
Definitely willing to pay	16%	14%	18%	0%	19%	15%	14%	14%	21%	14%	19%	16%	0%	16%	9%	34%	14%	17%	32%	15%	14%
Dont know/Cant say	1%	1%	0%	0%	0%	1%	2%	0%	1%	1%	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	19%	21%	18%	0%	12%	23%	27%	28%	11%	20%	34%	17%	0%	0%	31%	0%	0%	24%	0%	4%	33%
Cost too much for improvements	41%	45%	36%	0%	36%	50%	23%	72%	31%	27%	17%	44%	0%	40%	8%	0%	100%	49%	100%	34%	42%
Cant afford it	40%	34%	47%	0%	52%	27%	49%	0%	58%	53%	49%	39%	0%	60%	61%	0%	0%	27%	0%	61%	26%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	0%	100%	100%	100%	100%	100%
No of respondents	47	25	22	0	18	22	7	13	16	18	5	42	0	9	11	0	3	24	2	20	25

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	12%	12%	0%	10%	11%	17%	14%	11%	11%	17%	11%	0%	10%	19%	0%	9%	12%	5%	5%	26%
Probably not willing to pay	18%	17%	20%	0%	19%	21%	12%	15%	19%	20%	16%	19%	0%	19%	25%	8%	14%	18%	26%	17%	17%
Probably willing to pay	56%	55%	58%	100%	59%	57%	49%	60%	55%	54%	48%	57%	0%	49%	48%	66%	64%	58%	61%	67%	37%
Definitely willing to pay	12%	14%	9%	0%	11%	10%	19%	9%	15%	11%	13%	12%	0%	15%	8%	26%	14%	10%	8%	11%	15%
Dont know/Cant say	2%	2%	1%	0%	2%	1%	3%	2%	0%	3%	6%	1%	0%	7%	0%	0%	0%	1%	0%	0%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	14%	17%	10%	0%	5%	18%	19%	23%	10%	10%	32%	12%	0%	0%	17%	0%	20%	16%	0%	0%	28%
Cost too much for improvements	49%	43%	55%	0%	39%	62%	34%	77%	42%	36%	0%	55%	0%	32%	31%	100%	80%	57%	100%	39%	45%
Cant afford it	37%	39%	35%	0%	56%	21%	47%	0%	48%	54%	68%	34%	0%	68%	52%	0%	0%	27%	0%	61%	27%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	58	29	29	0	19	29	10	16	19	23	6	52	0	10	12	1	5	30	5	22	28

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	13%	13%	13%	0%	13%	12%	15%	9%	15%	14%	14%	13%	0%	13%	11%	12%	24%	11%	0%	19%	9%
Not very concerned	35%	35%	35%	0%	34%	34%	41%	34%	27%	44%	27%	36%	0%	52%	41%	23%	22%	32%	20%	36%	37%
Fairly concerned	23%	26%	21%	100%	28%	23%	13%	24%	31%	16%	26%	23%	0%	14%	10%	34%	36%	26%	22%	28%	18%
Very concerned	15%	16%	14%	0%	14%	15%	16%	20%	15%	11%	21%	14%	0%	10%	28%	0%	17%	14%	15%	11%	22%
Dont know/cant say	13%	10%	17%	0%	11%	15%	14%	13%	12%	15%	13%	13%	0%	11%	10%	30%	0%	16%	43%	6%	14%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	68	97	35	56	70	74	19	181	0	35	27	11	21	107	23	105	66

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	5%	6%	4%	0%	8%	4%	3%	7%	7%	3%	14%	4%	0%	0%	5%	0%	9%	7%	8%	3%	7%
Ensuring a reliable & continuous water supply	8%	6%	9%	0%	13%	5%	5%	15%	5%	4%	9%	8%	0%	0%	7%	0%	27%	8%	4%	6%	11%
Ensuring the safety of tap water	21%	22%	21%	0%	27%	19%	17%	32%	26%	8%	44%	19%	0%	0%	21%	0%	36%	28%	16%	20%	26%
Managing the appearance, taste & smell of tap water	9%	7%	11%	100%	12%	4%	12%	8%	12%	5%	10%	8%	0%	5%	11%	0%	0%	12%	6%	9%	8%
Managing the pressure of water in your taps & the number of unplanned interruptions	4%	4%	3%	0%	4%	3%	5%	5%	3%	3%	0%	4%	0%	1%	9%	0%	9%	2%	0%	2%	7%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	5%	5%	4%	0%	7%	4%	5%	8%	7%	0%	22%	3%	0%	0%	9%	0%	17%	3%	0%	5%	6%
Avoid the risk of homes & gardens being flooded with sewerage	3%	2%	3%	0%	4%	3%	0%	0%	4%	4%	11%	2%	0%	0%	6%	0%	0%	4%	0%	3%	4%
Managing the amount of water taken from the environment to supply customers	2%	3%	2%	0%	3%	2%	2%	3%	1%	3%	7%	2%	0%	2%	0%	0%	9%	2%	0%	4%	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	2%	3%	2%	0%	0%	5%	0%	3%	4%	0%	14%	1%	0%	0%	0%	8%	4%	3%	0%	2%	4%
No of respondents	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	11%	15%	7%	0%	15%	9%	10%	14%	10%	10%	27%	9%	0%	7%	6%	0%	5%	16%	12%	14%	6%
Bills show one big change in first year	18%	18%	19%	0%	10%	25%	15%	27%	17%	13%	12%	19%	0%	10%	11%	15%	9%	25%	72%	10%	12%
Bills change steadily every year	71%	66%	75%	100%	75%	66%	75%	59%	73%	77%	61%	72%	0%	83%	83%	85%	85%	59%	16%	76%	82%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
	201	99	102	1	68	97	35	56	71	74	19	182	0	35	28	11	21	107	23	106	66

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£9)	Maintain current service (£7)	Maintain current service (£7)
TAP WATER	2. Ensuring a reliable and continuous water supply	Maintain current service (£4)	Maintain current service (£4)	Maintain current service (£4)
TAP WATER	3. Ensuring the safety of tap water	Treatment works continue to meet current and future standards and no improvements other than maintenance required Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required,12,880 of w (£1)	Treatment works continue to meet current and future standards and no improvements other than maintenance required Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required, 12,880 of w (£1)	Treatment works continue to meet current and future standards and no improvements other than maintenance required Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required,12,880 of wa (£1)
TAP WATER	4. Managing the appearance, taste and smell of tap water	Ensure no increase in the number of customer complaints about the appearance, taste or smell of tap water (£0)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£0)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£0)
TAP WATER	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£12)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£11)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£11)
SEWERAGE	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 793 to 697. Reduce the number of properties externally flooding from sewers by 753 (£1)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£1)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£2)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	19 Km of rivers can better support fish and rare wildlife (Less than £1)	19 Km of rivers can better support fish and rare wildlife (Less than £1)	24 Km of rivers can better support fish and rare wildlife, 1 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)
ENVIRONMENT	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	650 Km of rivers can better support fish, 126 Km of rivers can support rare wildlife, 1 wetlands and 9 lakes are improved and can support rare wildlife. (£8)	423 Km of rivers can better support fish, 126 Km of rivers and 0 Km2 of coastal waters can support rare wildlife, 1 wetlands and 9 lakes are improved and can support rare wildlife. (£6)	1,073 Km of rivers can better support fish, 126 Km of rivers can support rare wildlife, 1 wetlands and 9 lakes are improved and can support rare wildlife. (£12)
		Overall cost, taking account of cost savings, on average bill by 2010 is £31 (excluding inflation). Overall bill by 2010 is £218 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £25 (plus inflation). Overall bill by 2010 is £212 (plus inflation)	Overall cost on average bill by 2010 is £32 (excluding inflation). Overall bill by 2010 is £219 (plus inflation)

1. Key Findings

South West Water is a water and sewerage company serving a population of 1.56 million with water and 1.54 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £73
Reference Plan A - £80
Reference Plan B - £89

☐ 77% of customers expressed satisfaction with the level of service provided by South West Water, with 14% expressing dissatisfaction with these services. 37% regarded the services as good value for money whilst 42% said the services provided were poor value for money.

☐ Between 76% and 92% of all customers indicated that it was important to maintain the current level of all services provided, and between 59% and 77% considered it important for all services to be improved. Customers thought it most and equally important to maintain the 'safety of tap water' (92%) and 'a reliable and continuous water supply' (92%). Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs' (76%). Customers thought it most important for improvements to 'managing the appearance taste and smell of tap water' (77%) and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells for sewage works' (73%) to be introduced by 2010. Least importance was attached to improvements in 'handling customer accounts, queries, complaints and customers with special needs' (59%).

☐ Customer approval was similar for the Company Preferred Plan and Reference Plan A, and slightly less for Reference Plan B. Across all three plans (each of which proposed a combination of maintained and improved services), the proposed outputs customers would most like to see are those to 'ensure the safety of tap water' (63%-64%), followed by those to 'ensure a reliable and continuous water supply' (57%-59%) and 'maintaining water pipes, treatment works and reservoirs' (57%-59%). 'Handling customer accounts, queries, complaints and customers with special needs'(44%-46%), 'managing the amount of water taken from the environment to supply customers' (44%-46%) and 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' (37% in Reference Plan A to 51% in Company Preferred Plan) were ranked as lowest priority across the plans.

☐ 71% of customers were not concerned to see any more improvements than those proposed in the three plans put forward by the company. Where customers did express a view that further improvements were needed, they were most and equally as likely to identify 'ensuring the safety of tap water' and 'managing the appearance, taste and smell of tap water' (both 7%).

☐ The proportion of customers regarding the proposals as good value for money ranged from 29% for the Company Preferred Plan, to 23% for Reference Plan A and 19% for Reference Plan B. At least half of all customers regarded each plan as poor value for money. This proportion was at 60% for Reference Plan B, 53% for Reference Plan A and 50% for the Company Preferred Plan.

☐ The proportion of customers indicating they were 'willing to pay' ranged from 36% for Reference Plan B (32% probably willing, 4% definitely willing), 41% for Reference Plan A (38% probably willing, 3% definitely willing) to 46% for the Company Preferred Plan (40% probably willing, 6% definitely willing). Customers were most (63%) unwilling to pay for Reference Plan B (43% probably not willing, 20% definitely not willing), followed by (58%) Reference Plan A (45% probably not willing, 13% definitely not willing) and (53%) the Company Preferred Plan (38% probably not willing, 15% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (65% for Company Preferred Plan and 58% for Reference Plan A and Reference Plan B). Between 16% and 25% of all South West water customers indicated that they could not afford the bill increases set out in the proposed company plans (15% for Company Preferred Plan, 22% for Reference Plan A and 25% for Reference Plan B).

☐ 53% of customers indicated that they were not concerned if some improvements had to be delayed until after 2010 and 43% said that they would be concerned. Delays to improvemnets in the safety of tap water would cause the greatest concern. 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs' or to 'managing the amount of water taken from the environment to supply customers'.

☐ 80% of South West Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £21/annum), 'managing the appearance, taste and smell of tap water' (£2/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£37-£40/annum).

2. Introduction

The attitudes and preferences of South West Water customers, reported in section 3, are based on a sample of 203 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty years
	3. Ensuring the safety of tap water	99.92% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 35,842 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	250 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	241 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	0 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	98% of rivers are of good, 1% fair and 1% poor quality.98% of designated bathing waters meet minimum standards and 84% meet higher standards.19% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £328 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	2%	3%	1%	0%	1%	2%	2%	0%	2%	4%	1%	3%	0%	2%	0%	0%	0%	5%	3%	1%	0%
Very dissatisfied	2%	4%	1%	0%	3%	3%	1%	3%	2%	1%	4%	1%	0%	2%	0%	0%	8%	1%	2%	4%	0%
Fairly dissatisfied	10%	8%	11%	19%	3%	14%	12%	14%	6%	11%	7%	10%	77%	10%	13%	9%	0%	14%	7%	16%	12%
Neither satisfied nor dissatisfied	8%	5%	11%	0%	9%	8%	6%	2%	6%	15%	6%	9%	0%	11%	13%	5%	2%	8%	10%	3%	6%
Fairly satisfied	39%	35%	43%	16%	37%	40%	45%	32%	45%	39%	42%	38%	23%	43%	40%	38%	31%	43%	37%	37%	47%
Very satisfied	34%	38%	30%	35%	42%	28%	32%	46%	33%	25%	34%	35%	0%	29%	27%	48%	42%	28%	34%	39%	29%
Extremely satisfied	4%	5%	3%	29%	3%	5%	1%	0%	5%	6%	3%	4%	0%	3%	8%	0%	11%	1%	5%	0%	5%
Dont know/cant say	1%	2%	0%	0%	3%	0%	0%	3%	0%	0%	3%	0%	0%	0%	0%	0%	6%	0%	2%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	2%	5%	0%	5%	4%	1%	0%	3%	7%	3%	4%	0%	9%	5%	0%	2%	3%	3%	2%	6%
Very poor value	12%	13%	12%	16%	8%	16%	13%	11%	12%	14%	11%	13%	0%	11%	11%	8%	14%	14%	14%	13%	7%
Fairly poor value	26%	24%	29%	0%	21%	34%	26%	28%	27%	23%	20%	28%	77%	26%	37%	41%	11%	22%	19%	39%	36%
Neither poor nor good value	19%	21%	17%	19%	24%	16%	15%	18%	15%	25%	21%	18%	0%	18%	16%	13%	14%	26%	22%	20%	8%
Fairly good value	28%	32%	24%	45%	32%	21%	31%	27%	33%	23%	32%	26%	23%	28%	21%	17%	53%	24%	32%	14%	28%
Very good value	9%	8%	10%	19%	7%	9%	11%	12%	9%	7%	11%	8%	0%	7%	11%	14%	5%	9%	8%	8%	14%
Extremely good value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	2%	1%	3%	0%	3%	0%	2%	4%	1%	1%	2%	2%	0%	1%	0%	6%	0%	1%	1%	5%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	103	6	71	75	50	57	82	63	65	135	3	35	27	37	35	68	120	43	39

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	90%	91%	89%	81%	93%	95%	79%	92%	93%	84%	91%	89%	100%	82%	90%	93%	86%	94%	87%	91%	97%
Ensuring a reliable & continuous water supply	92%	91%	92%	81%	93%	95%	85%	94%	94%	86%	97%	89%	100%	84%	96%	94%	92%	92%	87%	98%	97%
Ensuring the safety of tap water	92%	91%	93%	81%	96%	94%	85%	96%	94%	86%	95%	90%	100%	82%	96%	93%	95%	93%	88%	100%	94%
Managing the appearance, taste & smell of tap water	85%	82%	88%	65%	84%	92%	80%	83%	90%	82%	86%	85%	100%	74%	93%	85%	80%	91%	82%	95%	86%
Managing the pressure of water in your taps & the number of unplanned interruptions	83%	83%	83%	81%	81%	90%	75%	79%	91%	76%	86%	81%	100%	71%	92%	85%	74%	89%	78%	92%	88%
Handling customers' accounts, queries, complaints & customers with special needs	76%	78%	75%	29%	83%	82%	63%	72%	83%	70%	88%	70%	77%	58%	81%	74%	72%	87%	67%	94%	84%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	88%	90%	86%	81%	96%	91%	72%	84%	93%	83%	93%	85%	100%	75%	90%	85%	91%	93%	80%	99%	97%
Avoid the risk of homes & gardens being flooded with sewerage	85%	86%	85%	45%	93%	88%	75%	90%	89%	77%	97%	80%	100%	73%	86%	80%	95%	90%	78%	97%	97%
Managing the amount of water taken from the environment to supply customers	80%	81%	79%	45%	88%	84%	68%	85%	88%	66%	94%	74%	57%	60%	84%	80%	86%	86%	73%	93%	89%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	83%	84%	82%	29%	93%	87%	70%	90%	90%	67%	96%	76%	100%	59%	84%	80%	97%	89%	79%	96%	80%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	62%	59%	65%	49%	61%	71%	51%	41%	71%	69%	64%	61%	77%	61%	63%	66%	26%	78%	46%	90%	80%
Ensuring a reliable & continuous water supply	62%	58%	66%	65%	64%	70%	49%	48%	69%	67%	70%	58%	100%	59%	66%	71%	29%	75%	45%	90%	84%
Ensuring the safety of tap water	67%	64%	69%	81%	69%	73%	52%	62%	70%	67%	70%	64%	100%	55%	66%	75%	44%	81%	54%	90%	81%
Managing the appearance, taste & smell of tap water	77%	70%	82%	77%	80%	83%	63%	74%	79%	76%	74%	77%	100%	59%	77%	82%	59%	91%	68%	92%	85%
Managing the pressure of water in your taps & the number of unplanned interruptions	61%	56%	65%	49%	62%	69%	47%	57%	64%	59%	62%	60%	77%	46%	68%	69%	38%	72%	48%	81%	76%
Handling customers' accounts, queries, complaints & customers with special needs	59%	60%	58%	29%	64%	70%	39%	61%	59%	57%	70%	53%	77%	41%	68%	62%	49%	68%	43%	84%	81%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	73%	72%	75%	81%	78%	81%	56%	66%	80%	71%	73%	73%	100%	64%	82%	87%	46%	82%	59%	94%	96%
Avoid the risk of homes & gardens being flooded with sewerage	64%	62%	67%	45%	67%	73%	50%	57%	71%	62%	73%	60%	100%	53%	65%	74%	49%	73%	45%	94%	92%
Managing the amount of water taken from the environment to supply customers	62%	62%	61%	45%	63%	68%	52%	61%	66%	57%	76%	55%	57%	50%	67%	81%	41%	66%	42%	91%	88%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	66%	66%	65%	29%	74%	72%	49%	62%	75%	57%	81%	58%	100%	48%	67%	72%	60%	74%	50%	92%	85%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

SOUTH WEST WATER

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	59%	57%	61%	32%	67%	56%	55%	71%	62%	44%	72%	52%	77%	49%	56%	73%	62%	56%	47%	67%	87%
Ensuring a reliable & continuous water supply	59%	54%	63%	51%	68%	57%	48%	68%	60%	48%	69%	53%	77%	41%	63%	71%	64%	57%	48%	67%	82%
Ensuring the safety of tap water	63%	62%	65%	51%	75%	59%	54%	67%	62%	60%	71%	59%	77%	48%	60%	76%	67%	63%	55%	74%	74%
Managing the appearance, taste & smell of tap water	58%	59%	57%	32%	68%	51%	57%	60%	61%	52%	63%	55%	77%	44%	48%	70%	56%	63%	47%	69%	77%
Managing the pressure of water in your taps & the number of unplanned interruptions	50%	47%	53%	32%	54%	52%	42%	60%	51%	38%	60%	45%	34%	35%	46%	52%	53%	56%	39%	63%	66%
Handling customers' accounts, queries, complaints & customers with special needs	45%	41%	50%	32%	53%	43%	39%	51%	47%	38%	56%	40%	34%	37%	38%	52%	43%	51%	34%	58%	66%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	57%	54%	59%	32%	63%	53%	56%	60%	60%	49%	67%	52%	34%	49%	61%	68%	50%	56%	46%	68%	76%
Avoid the risk of homes & gardens being flooded with sewerage	53%	53%	54%	51%	66%	49%	43%	61%	55%	44%	67%	47%	34%	37%	42%	70%	56%	56%	43%	73%	63%
Managing the amount of water taken from the environment to supply customers	46%	43%	50%	32%	51%	46%	42%	57%	49%	34%	55%	43%	34%	33%	42%	52%	50%	50%	37%	59%	60%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	51%	52%	49%	32%	63%	47%	40%	68%	52%	32%	64%	44%	34%	32%	34%	65%	67%	51%	43%	58%	65%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	58%	56%	60%	32%	67%	55%	54%	71%	60%	44%	70%	52%	77%	44%	61%	71%	62%	56%	47%	67%	83%
Ensuring a reliable & continuous water supply	58%	53%	63%	51%	68%	57%	47%	68%	60%	48%	69%	53%	77%	39%	63%	71%	64%	57%	48%	65%	82%
Ensuring the safety of tap water	64%	63%	66%	51%	76%	61%	53%	75%	62%	58%	73%	60%	77%	41%	60%	79%	76%	64%	58%	71%	76%
Managing the appearance, taste & smell of tap water	55%	52%	58%	16%	70%	46%	53%	57%	57%	51%	62%	51%	77%	43%	44%	65%	53%	61%	44%	70%	70%
Managing the pressure of water in your taps & the number of unplanned interruptions	48%	45%	52%	32%	52%	49%	44%	60%	50%	36%	59%	44%	34%	34%	42%	52%	53%	54%	38%	65%	61%
Handling customers' accounts, queries, complaints & customers with special needs	46%	40%	51%	32%	54%	44%	38%	51%	47%	39%	56%	41%	34%	35%	39%	52%	45%	51%	33%	63%	64%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	55%	53%	58%	32%	61%	53%	54%	60%	57%	48%	64%	51%	34%	48%	48%	68%	54%	56%	46%	64%	74%
Avoid the risk of homes & gardens being flooded with sewerage	51%	50%	53%	35%	65%	47%	40%	61%	51%	42%	64%	45%	34%	29%	39%	68%	56%	56%	41%	72%	58%
Managing the amount of water taken from the environment to supply customers	44%	39%	49%	16%	48%	45%	41%	57%	45%	32%	53%	40%	34%	29%	39%	52%	50%	47%	37%	57%	52%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	45%	46%	44%	16%	56%	42%	37%	60%	45%	31%	54%	41%	34%	27%	28%	62%	61%	43%	39%	48%	57%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	57%	53%	60%	16%	66%	55%	52%	68%	58%	45%	65%	52%	77%	41%	61%	65%	62%	56%	45%	65%	84%
Ensuring a reliable & continuous water supply	57%	52%	62%	35%	65%	58%	48%	64%	60%	48%	69%	51%	77%	33%	67%	65%	67%	57%	47%	68%	76%
Ensuring the safety of tap water	64%	63%	65%	35%	78%	60%	53%	75%	60%	58%	74%	58%	77%	38%	60%	81%	76%	63%	57%	73%	74%
Managing the appearance, taste & smell of tap water	54%	52%	57%	16%	67%	46%	54%	57%	55%	50%	62%	50%	77%	40%	44%	65%	50%	62%	44%	70%	67%
Managing the pressure of water in your taps & the number of unplanned interruptions	49%	45%	52%	16%	55%	49%	42%	63%	48%	36%	62%	42%	34%	31%	42%	57%	53%	53%	39%	65%	58%
Handling customers' accounts, queries, complaints & customers with special needs	44%	38%	51%	16%	53%	43%	37%	51%	44%	39%	55%	39%	34%	32%	39%	52%	42%	50%	32%	63%	61%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	52%	48%	56%	16%	58%	49%	53%	60%	54%	42%	61%	48%	34%	40%	48%	68%	48%	54%	42%	64%	68%
Avoid the risk of homes & gardens being flooded with sewerage	52%	49%	54%	35%	67%	46%	41%	61%	50%	45%	64%	46%	34%	35%	41%	68%	56%	54%	40%	73%	61%
Managing the amount of water taken from the environment to supply customers	45%	40%	49%	16%	51%	45%	40%	60%	44%	32%	56%	39%	34%	29%	39%	57%	50%	46%	38%	57%	52%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	37%	38%	36%	16%	42%	37%	33%	40%	41%	30%	40%	36%	34%	29%	30%	51%	47%	32%	32%	33%	57%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	2%
Ensuring a reliable & continuous water supply	7%
Ensuring the safety of tap water	7%
Managing the appearance, taste & smell of tap water	2%
Managing the pressure of water in your taps & the number of unplanned interruptions	3%
Handling customers' accounts, queries, complaints & customers with special needs	4%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	1%
Avoid the risk of homes & gardens being flooded with sewerage	3%
Managing the amount of water taken from the environment to supply customers	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	2%
Introduce option of having a water meter	1%
Speed up process of repairs	3%
(further) improve cleanliness of the rivers	2%
maintain the correct service level	1%
Reduce risk of floods	1%
Improve quality of pipe repair workmanship	1%
No, none	71%
No of respondents	203

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	9%	11%	7%	0%	6%	12%	9%	11%	8%	8%	11%	8%	0%	9%	8%	6%	8%	11%	12%	8%	0%
Very poor value	14%	12%	16%	16%	17%	14%	11%	13%	18%	11%	15%	14%	0%	12%	11%	19%	20%	11%	17%	6%	13%
Fairly poor value	27%	27%	26%	35%	20%	34%	24%	30%	22%	29%	25%	27%	43%	18%	25%	29%	14%	37%	22%	39%	29%
Neither poor nor good value	18%	20%	17%	14%	23%	16%	15%	14%	21%	18%	14%	21%	0%	23%	14%	21%	24%	13%	22%	15%	9%
Fairly good value	26%	27%	26%	16%	32%	23%	24%	32%	24%	24%	30%	25%	23%	19%	42%	23%	31%	24%	24%	26%	31%
Very good value	3%	2%	3%	19%	1%	0%	7%	0%	3%	5%	3%	3%	0%	5%	0%	3%	0%	4%	2%	4%	3%
Extremely good value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	3%	2%	4%	0%	0%	1%	11%	0%	4%	5%	2%	3%	34%	13%	0%	0%	3%	1%	0%	2%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	10%	11%	9%	0%	6%	14%	10%	11%	9%	10%	13%	9%	0%	11%	8%	8%	8%	12%	14%	8%	0%
Very poor value	16%	16%	17%	16%	16%	20%	12%	13%	21%	14%	15%	17%	0%	17%	17%	11%	26%	14%	18%	14%	15%
Fairly poor value	27%	24%	30%	33%	26%	30%	24%	34%	23%	27%	25%	28%	43%	18%	23%	39%	11%	36%	26%	31%	28%
Neither poor nor good value	20%	24%	15%	16%	27%	16%	16%	18%	21%	19%	17%	21%	23%	24%	18%	16%	33%	13%	21%	21%	12%
Fairly good value	22%	21%	23%	35%	24%	19%	23%	25%	21%	21%	25%	21%	0%	11%	34%	26%	17%	24%	20%	24%	27%
Very good value	1%	3%	0%	0%	1%	1%	3%	0%	1%	3%	2%	1%	0%	6%	0%	0%	3%	0%	1%	0%	3%
Extremely good value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	3%	2%	5%	0%	0%	1%	12%	0%	4%	6%	2%	3%	34%	13%	0%	0%	3%	2%	1%	2%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	14%	15%	12%	0%	8%	20%	13%	15%	11%	16%	17%	12%	0%	19%	12%	8%	8%	18%	18%	13%	0%
Very poor value	20%	20%	20%	29%	19%	24%	16%	16%	25%	17%	21%	20%	0%	14%	18%	16%	28%	23%	21%	15%	24%
Fairly poor value	26%	23%	29%	35%	28%	25%	23%	27%	25%	27%	25%	27%	0%	25%	24%	34%	16%	28%	22%	33%	27%
Neither poor nor good value	18%	19%	17%	0%	27%	11%	16%	18%	18%	18%	12%	21%	23%	15%	24%	16%	28%	13%	21%	11%	16%
Fairly good value	18%	19%	17%	35%	18%	16%	18%	25%	18%	12%	23%	16%	0%	10%	23%	26%	16%	16%	17%	23%	15%
Very good value	1%	1%	0%	0%	0%	0%	3%	0%	0%	2%	0%	1%	0%	4%	0%	0%	0%	0%	0%	0%	3%
Extremely good value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	4%	2%	6%	0%	0%	3%	11%	0%	4%	7%	2%	3%	77%	14%	0%	0%	3%	3%	0%	4%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	99	102	6	70	75	50	57	83	62	65	134	3	34	27	37	35	68	120	43	37

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	15%	16%	15%	0%	7%	24%	15%	15%	13%	18%	17%	14%	0%	23%	9%	13%	9%	18%	14%	23%	12%
Probably not willing to pay	38%	34%	43%	65%	37%	43%	31%	37%	42%	35%	33%	40%	77%	31%	40%	32%	49%	39%	39%	33%	41%
Probably willing to pay	40%	45%	36%	16%	49%	29%	47%	39%	43%	38%	47%	37%	23%	39%	47%	45%	36%	38%	40%	43%	39%
Definitely willing to pay	6%	5%	6%	19%	6%	4%	5%	9%	1%	8%	1%	8%	0%	5%	4%	9%	6%	4%	7%	2%	6%
Dont know/Cant say	1%	0%	1%	0%	0%	0%	2%	0%	1%	1%	1%	0%	0%	1%	0%	0%	0%	1%	1%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	2%	4%	0%	0%	0%	4%	0%	0%	0%	5%	0%	2%	0%	0%	0%	0%	0%	5%	3%	0%	0%
Cost too much for improvements	65%	68%	63%	76%	80%	66%	39%	72%	75%	45%	74%	63%	0%	26%	68%	93%	76%	65%	56%	79%	73%
Cant afford it	30%	25%	34%	24%	14%	26%	61%	15%	25%	49%	20%	32%	100%	74%	32%	7%	6%	30%	35%	21%	27%
Dont know/Cant say	4%	4%	3%	0%	6%	4%	0%	13%	0%	0%	6%	3%	0%	0%	0%	0%	19%	0%	6%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	109	50	59	4	32	50	23	30	46	34	33	74	2	19	13	17	21	39	64	24	21

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	13%	11%	15%	0%	8%	16%	18%	8%	12%	19%	8%	16%	0%	27%	8%	11%	0%	16%	15%	10%	11%
Probably not willing to pay	45%	44%	46%	65%	40%	51%	39%	49%	45%	41%	45%	44%	100%	35%	45%	40%	55%	47%	45%	47%	42%
Probably willing to pay	38%	41%	35%	16%	49%	31%	36%	40%	41%	32%	45%	36%	0%	32%	43%	46%	42%	33%	36%	43%	39%
Definitely willing to pay	3%	4%	2%	19%	3%	2%	4%	2%	1%	7%	1%	4%	0%	5%	4%	3%	3%	2%	3%	0%	6%
Dont know/Cant say	1%	0%	1%	0%	0%	0%	2%	0%	1%	1%	1%	0%	0%	1%	0%	0%	0%	1%	1%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	1%	1%	0%	0%	0%	1%	0%	0%	0%	2%	0%	1%	0%	0%	0%	0%	0%	2%	1%	0%	0%
Cost too much for improvements	58%	63%	53%	46%	70%	69%	25%	75%	62%	38%	64%	57%	0%	18%	63%	94%	75%	53%	47%	75%	74%
Cant afford it	38%	30%	44%	54%	24%	24%	75%	13%	36%	60%	28%	40%	100%	82%	37%	6%	5%	43%	45%	25%	26%
Dont know/Cant say	4%	5%	3%	0%	6%	6%	0%	12%	2%	0%	8%	2%	0%	0%	0%	0%	20%	2%	7%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	118	55	63	4	34	51	29	33	47	38	34	81	3	22	14	19	19	44	72	24	21

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	20%	17%	23%	33%	10%	26%	24%	11%	19%	31%	16%	23%	0%	32%	20%	11%	8%	26%	25%	17%	11%
Probably not willing to pay	43%	41%	44%	31%	43%	49%	34%	46%	47%	34%	42%	42%	100%	33%	36%	45%	55%	42%	40%	45%	47%
Probably willing to pay	32%	36%	29%	35%	38%	23%	37%	43%	29%	28%	35%	32%	0%	24%	40%	39%	34%	29%	31%	38%	32%
Definitely willing to pay	4%	4%	3%	0%	8%	2%	1%	0%	3%	7%	5%	3%	0%	9%	4%	3%	3%	1%	3%	0%	9%
Dont know/Cant say	1%	1%	1%	0%	1%	0%	2%	0%	2%	1%	2%	0%	0%	1%	0%	2%	0%	1%	1%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	1%	1%	0%	0%	0%	1%	0%	0%	0%	2%	0%	1%	0%	0%	0%	0%	0%	2%	1%	0%	0%
Cost too much for improvements	58%	64%	53%	46%	66%	67%	32%	75%	61%	40%	70%	55%	0%	27%	72%	85%	65%	53%	48%	70%	76%
Cant afford it	38%	32%	44%	54%	28%	28%	68%	13%	39%	58%	25%	42%	100%	73%	28%	15%	17%	45%	46%	30%	24%
Dont know/Cant say	3%	3%	3%	0%	5%	3%	0%	12%	0%	0%	5%	2%	0%	0%	0%	0%	17%	0%	5%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	128	59	69	4	38	57	30	33	55	41	38	87	3	23	15	21	22	47	78	27	22

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	14%	16%	12%	0%	9%	15%	21%	11%	14%	16%	13%	14%	34%	31%	12%	18%	8%	7%	13%	14%	16%
Not very concerned	39%	35%	43%	71%	42%	33%	40%	43%	39%	36%	43%	38%	23%	34%	27%	37%	53%	40%	36%	35%	50%
Fairly concerned	29%	29%	30%	29%	33%	26%	28%	19%	33%	33%	25%	32%	0%	22%	37%	33%	25%	30%	35%	20%	21%
Very concerned	14%	16%	11%	0%	17%	16%	8%	16%	13%	12%	16%	13%	0%	12%	25%	5%	14%	15%	15%	12%	12%
Dont know/cant say	4%	5%	4%	0%	0%	10%	2%	11%	1%	3%	4%	4%	43%	2%	0%	6%	0%	8%	0%	18%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	12%	14%	10%	0%	13%	11%	13%	9%	14%	13%	12%	13%	0%	12%	28%	11%	11%	6%	13%	2%	19%
Ensuring a reliable & continuous water supply	12%	13%	11%	29%	16%	9%	8%	6%	12%	18%	12%	12%	0%	2%	28%	6%	14%	13%	13%	3%	18%
Ensuring the safety of tap water	24%	25%	22%	29%	31%	24%	11%	16%	25%	28%	21%	25%	0%	16%	38%	22%	30%	19%	26%	12%	29%
Managing the appearance, taste & smell of tap water	9%	7%	11%	0%	7%	15%	4%	13%	8%	8%	6%	11%	0%	5%	4%	14%	3%	14%	9%	12%	6%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	2%	0%	0%	0%	3%	0%	0%	1%	2%	0%	2%	0%	0%	3%	0%	0%	2%	2%	0%	0%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	1%	0%	0%	2%	0%	0%	0%	0%	0%	2%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	14%	13%	15%	16%	21%	11%	8%	13%	19%	9%	17%	13%	0%	12%	20%	5%	16%	16%	16%	11%	13%
Avoid the risk of homes & gardens being flooded with sewerage	1%	1%	1%	0%	1%	2%	0%	2%	1%	0%	0%	2%	0%	0%	0%	2%	0%	2%	2%	0%	0%
Managing the amount of water taken from the environment to supply customers	0%	1%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	2%	3%	2%	0%	3%	3%	1%	6%	1%	2%	0%	4%	0%	5%	0%	0%	9%	0%	4%	0%	1%
No of respondents	203	99	103	6	71	75	50	57	83	63	65	135	3	35	27	37	35	68	120	43	39

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	15%	17%	14%	32%	15%	11%	21%	7%	17%	22%	17%	14%	34%	30%	6%	13%	14%	14%	19%	4%	15%
Bills show one big change in first year	5%	5%	5%	0%	4%	8%	3%	0%	9%	4%	7%	4%	0%	4%	11%	5%	5%	3%	3%	9%	7%
Bills change steadily every year	80%	78%	81%	68%	81%	82%	76%	93%	74%	74%	76%	82%	66%	66%	84%	82%	81%	83%	78%	87%	77%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	202	99	103	6	71	75	49	57	82	62	65	134	3	35	27	37	35	67	120	42	39

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£12)	Maintain current service (£12)	Maintain current service (£11)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£7)	Maintain current service (£7)	Maintain current service (£7)
	3. Ensuring the safety of tap water	Meet current and future standards at 17 of treatment works. 2929 Km of water mains renovated to complete the renovation previously agreed. Pipes continue to provide water meeting current and future standards and no further improvements other than mainten (£21)	Meet current and future standards at 17 of treatment works. 2929 Km of water mains renovated to complete the renovation previously agreed. A lead pipe replacement programme is not required to meet new lead standards (£21)	Meet current and future standards at 17 of treatment works, 2929 Km of water mains renovated to complete the renovation previously agreed. A lead pipe replacement programme is not required to meet new lead standards. (£21)
	4. Managing the appearance, taste and smell of tap water	57% fewer customer complaints about the appearance, taste or smell of tap water (£2)	57% fewer customer complaints about the appearance, taste or smell of tap water (£2)	57% fewer customer complaints about the appearance, taste or smell of tap water (£2)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 34 sewage treatment works (£40)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 34 sewage treatment works (£40)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 34 sewage treatment works (£37)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 206 to 132. Reduce the number of properties externally flooding from sewers by 95 (£2)	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 206 to 132. Reduce the number of properties externally flooding from sewers by 95 (£2)	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 206 to 132. Reduce the number of properties externally flooding from sewers by 95 (£2)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	10 Km of rivers can better support fish, 3 designated bathing waters are improved (£5)	42 Km of rivers can better support fish, 32 Km of rivers and 12 Km2 of coastal waters can support rare wildlife (£12)	183 Km of rivers can better support fish, 32 Km of rivers and 12 Km2 of coastal waters can support rare wildlife, 16 designated bathing waters are improved (£23)
		Overall cost on average bill by 2010 is £73 (plus inflation). Overall bill by 2010 is £407 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £80 (plus inflation). Overall bill by 2010 is £414 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £88 (plus inflation). Overall bill by 2010 is £423 (plus inflation)

1. Key Findings

Thames Water is a water and sewerage company serving 8.1 million customers with water and 13.1 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £43
Reference Plan A - £38
Reference Plan B - £45

☐ 81% of customers said that they were satisfied with the level of service provided by Thames Water, with only 9% expressing dissatisfaction. 13% indicated that they felt the service represented poor value for money whilst 56% stated that it was good value for money.

☐ Customers thought it most important to maintain the 'safety of tap water' (92%) and 'a reliable and continuous water supply' (91%). Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs' (77%). Customers thought it most important for improvements to 'managing the appearance taste and smell of tap water' (69%) and 'ensuring the safety of tap water' (64%) to be introduced by 2010. Least importance was attached to improvements in 'handling customer accounts, queries, complaints and customers with special needs' (52%).

☐ Customers did not appear to have a significant preference for the set of proposals within any one of the three plans (each of which proposed a combination of maintained and improved services). Across the three plans, customer approval was greatest for the proposed outputs for 'ensuring the safety of tap water' (72% to 74%), followed by 'managing the appearance, taste and smell of tap water' (63%-65%) and thirdly, 'maintaining water pipes, treatment works and reservoirs' (62%-65%). 'Handling customers accounts, queries, complaints and customers with special needs' was ranked as the lowest priority within each plan, with customer support ranging from 54% for Reference Plan B, 55% for Reference Plan A and 57% for the Company Preferred Plan.

☐ 58% of customers were not concerned to see any more improvements than those proposed in the company plans. Where they did express a view for further improvement 'ensuring the safety of tap water' (11%) was considered the most important area for improvement.

☐ 45% and 42% of customers thought that Reference Plan A and the Company Preferred Plan respectively represented good value for money, whereas 37% said that Reference Plan B represented good value. 22% and 23% said the Company Preferred Plan and Reference Plan A respectively were poor value for money and 29% stated that Reference Plan B represented poor value for money.

☐ Approximately two thirds of all customers were 'willing to pay' to pay for all three plans. This proportion was 68% for the Company Preferred Plan (54% probably willing, 14% definitely willing) and Reference Plan A (52% probably willing, 16% definitely willing) and 65% for Reference Plan B (53% probably willing, 12% definitely willing). The proportion of customers 'not willing to pay' ranged from 26% (17% probably not willing, 9% definitely not willing) for the Company Preferred Plan and Reference Plan A, to 28% for Reference Plan B (19% probably not willing, 9% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (47% for Company Preferred Plan and Reference Plan B and 49% for Reference Plan A). Between 10% and 12% of all Thames Water customers indicated that they could not afford the bill increases set out in the proposed company plans (10% for the Company Preferred Plan and Reference Plan A and 12% for Reference Plan B).

☐ 58% of customers would not be concerned if some improvements were to be delayed, and 37% indicated that they would be concerned. 'Ensuring the safety of tap water' (14%) was the area of greatest concern if improvements were delayed. 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 76% of Thames Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £3-£5/annum), 'managing the appearance, taste and smell of tap water' (less than £1/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£7-8/annum).

2. Introduction

The attitudes and preferences of Thames Water customers, reported in section 3, are based on a sample of 396 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.92% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 5,000 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	4,600 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99% of billing enquiries answered within 5 days and 99% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	4,050 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	27 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	84% of rivers are of good, 11% fair and 5% poor quality.100% of designated bathing waters meet minimum standards and 73% meet higher standards.86% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £196 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	1%	1%	0%	2%	0%	1%	1%	0%	3%	1%	1%	0%	0%	2%	0%	2%	1%	0%	1%	1%
Very dissatisfied	3%	3%	2%	0%	3%	2%	4%	2%	4%	2%	3%	3%	0%	0%	2%	2%	3%	3%	5%	6%	1%
Fairly dissatisfied	5%	4%	5%	44%	5%	3%	3%	3%	6%	6%	7%	4%	100%	10%	7%	9%	2%	3%	11%	2%	4%
Neither satisfied nor dissatisfied	9%	9%	9%	21%	9%	9%	9%	6%	9%	14%	5%	10%	0%	19%	8%	8%	6%	9%	16%	7%	9%
Fairly satisfied	47%	47%	47%	0%	46%	53%	36%	46%	47%	47%	41%	47%	0%	37%	55%	45%	37%	52%	48%	32%	51%
Very satisfied	31%	32%	30%	34%	30%	29%	39%	39%	27%	23%	33%	31%	0%	23%	26%	26%	45%	28%	12%	45%	31%
Extremely satisfied	3%	3%	4%	0%	3%	3%	5%	4%	2%	5%	8%	3%	0%	11%	0%	6%	3%	2%	6%	6%	2%
Dont know/cant say	2%	2%	2%	0%	3%	0%	3%	0%	5%	0%	2%	2%	0%	0%	0%	4%	2%	2%	1%	1%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	396	195	201	4	153	170	63	159	141	96	50	342	1	39	38	34	91	194	51	88	243

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	1%	0%	1%	0%	1%	1%	0%	0%	0%	2%	0%	1%	0%	0%	0%	5%	0%	0%	3%	0%	0%
Very poor value	4%	4%	4%	0%	6%	4%	1%	2%	6%	4%	4%	4%	0%	5%	4%	5%	3%	4%	5%	5%	3%
Fairly poor value	8%	11%	6%	0%	11%	7%	4%	9%	8%	8%	8%	8%	100%	12%	5%	7%	7%	9%	4%	7%	9%
Neither poor nor good value	23%	19%	26%	0%	28%	18%	26%	20%	26%	21%	21%	23%	0%	19%	34%	34%	22%	19%	36%	23%	21%
Fairly good value	44%	50%	38%	34%	35%	53%	39%	44%	38%	50%	46%	43%	0%	42%	44%	39%	39%	47%	46%	40%	44%
Very good value	11%	9%	12%	41%	8%	9%	19%	14%	9%	9%	13%	10%	0%	12%	4%	6%	15%	11%	1%	17%	11%
Extremely good value	1%	1%	1%	0%	0%	2%	0%	1%	1%	1%	3%	1%	0%	0%	2%	0%	3%	0%	1%	3%	0%
Dont know/cant say	9%	6%	12%	24%	11%	6%	10%	10%	12%	5%	5%	10%	0%	10%	6%	4%	12%	9%	3%	6%	11%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	399	195	204	4	154	171	63	162	141	96	50	345	1	39	40	34	91	195	51	90	244

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	87%	86%	88%	100%	82%	90%	90%	89%	88%	83%	80%	88%	100%	82%	80%	83%	86%	91%	81%	94%	87%
Ensuring a reliable & continuous water supply	91%	91%	92%	100%	90%	93%	90%	93%	91%	90%	86%	92%	100%	94%	89%	87%	92%	92%	83%	96%	92%
Ensuring the safety of tap water	92%	91%	92%	100%	89%	94%	90%	92%	92%	90%	86%	92%	100%	90%	92%	87%	89%	94%	87%	96%	92%
Managing the appearance, taste & smell of tap water	88%	87%	90%	100%	86%	89%	90%	88%	89%	87%	81%	89%	100%	81%	85%	90%	83%	93%	86%	89%	89%
Managing the pressure of water in your taps & the number of unplanned interruptions	88%	88%	88%	100%	83%	90%	91%	88%	89%	86%	78%	90%	100%	87%	79%	87%	83%	92%	86%	87%	90%
Handling customers' accounts, queries, complaints & customers with special needs	77%	75%	78%	100%	75%	75%	85%	80%	75%	74%	86%	75%	100%	70%	72%	65%	76%	81%	64%	85%	77%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	87%	85%	90%	100%	82%	91%	90%	84%	91%	86%	81%	88%	100%	87%	88%	81%	84%	90%	85%	95%	86%
Avoid the risk of homes & gardens being flooded with sewerage	89%	86%	91%	100%	87%	90%	91%	89%	90%	87%	83%	90%	100%	90%	83%	84%	88%	91%	85%	92%	89%
Managing the amount of water taken from the environment to supply customers	83%	83%	84%	100%	82%	83%	88%	84%	85%	81%	83%	84%	100%	83%	75%	77%	87%	85%	86%	90%	82%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	83%	83%	84%	100%	82%	82%	90%	83%	85%	81%	84%	83%	100%	81%	75%	81%	84%	86%	86%	86%	83%
No of respondents	391	194	198	4	149	169	63	159	139	94	48	341	1	39	40	34	88	192	51	89	238

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	58%	55%	61%	59%	64%	55%	52%	60%	55%	60%	62%	57%	100%	58%	50%	45%	65%	59%	32%	70%	58%
Ensuring a reliable & continuous water supply	58%	55%	61%	59%	66%	52%	53%	59%	55%	62%	68%	57%	100%	60%	58%	42%	61%	59%	28%	73%	58%
Ensuring the safety of tap water	64%	61%	68%	59%	73%	60%	54%	65%	60%	68%	67%	63%	100%	64%	57%	60%	72%	63%	52%	79%	61%
Managing the appearance, taste & smell of tap water	69%	66%	72%	100%	73%	66%	65%	66%	66%	78%	75%	68%	100%	70%	66%	62%	69%	70%	74%	82%	64%
Managing the pressure of water in your taps & the number of unplanned interruptions	57%	52%	61%	59%	62%	52%	53%	54%	55%	63%	60%	56%	100%	63%	59%	46%	52%	59%	33%	63%	58%
Handling customers' accounts, queries, complaints & customers with special needs	52%	48%	55%	59%	55%	49%	49%	56%	48%	49%	60%	50%	100%	50%	30%	42%	55%	56%	12%	69%	53%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	62%	59%	65%	59%	68%	59%	55%	63%	59%	64%	69%	60%	100%	62%	49%	50%	70%	63%	39%	81%	59%
Avoid the risk of homes & gardens being flooded with sewerage	60%	57%	63%	59%	65%	57%	57%	59%	57%	67%	61%	60%	100%	64%	54%	43%	62%	63%	36%	74%	60%
Managing the amount of water taken from the environment to supply customers	62%	59%	65%	59%	71%	57%	51%	67%	58%	59%	73%	60%	100%	55%	44%	51%	73%	63%	45%	77%	58%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	61%	58%	63%	59%	69%	55%	56%	65%	58%	57%	75%	58%	100%	54%	43%	51%	69%	63%	38%	78%	58%
No of respondents	390	194	196	4	149	168	63	158	139	94	48	339	1	39	40	34	88	191	51	89	237

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	65%	68%	63%	80%	56%	72%	68%	65%	67%	63%	46%	68%	100%	49%	73%	68%	64%	67%	55%	75%	64%
Ensuring a reliable & continuous water supply	64%	66%	62%	100%	57%	67%	68%	62%	64%	66%	45%	66%	100%	59%	71%	69%	59%	65%	50%	75%	63%
Ensuring the safety of tap water	74%	73%	74%	100%	70%	76%	74%	76%	72%	71%	63%	75%	100%	66%	69%	86%	71%	75%	68%	78%	74%
Managing the appearance, taste & smell of tap water	65%	68%	63%	100%	63%	65%	71%	65%	69%	61%	53%	67%	100%	52%	69%	78%	60%	68%	54%	65%	68%
Managing the pressure of water in your taps & the number of unplanned interruptions	59%	60%	58%	100%	55%	61%	60%	58%	62%	57%	36%	62%	100%	49%	71%	65%	54%	60%	46%	62%	61%
Handling customers' accounts, queries, complaints & customers with special needs	57%	59%	56%	80%	53%	61%	55%	60%	56%	56%	36%	61%	100%	46%	60%	57%	58%	59%	38%	61%	61%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	65%	68%	63%	100%	54%	73%	68%	68%	63%	64%	52%	67%	100%	51%	66%	67%	67%	67%	47%	74%	66%
Avoid the risk of homes & gardens being flooded with sewerage	61%	63%	59%	100%	55%	64%	68%	59%	61%	65%	39%	64%	100%	58%	66%	68%	56%	62%	58%	65%	61%
Managing the amount of water taken from the environment to supply customers	61%	62%	59%	100%	54%	66%	59%	63%	61%	56%	41%	63%	100%	44%	61%	58%	64%	63%	52%	65%	61%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	60%	62%	58%	100%	55%	63%	59%	60%	59%	61%	38%	63%	100%	49%	61%	60%	60%	62%	48%	62%	62%
No of respondents	399	195	204	4	154	171	63	162	141	96	50	345	1	39	40	34	91	195	51	90	244

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	63%	67%	59%	100%	53%	70%	64%	61%	67%	60%	44%	66%	100%	47%	75%	66%	65%	62%	55%	77%	60%
Ensuring a reliable & continuous water supply	62%	65%	60%	100%	56%	66%	64%	59%	64%	66%	46%	65%	100%	57%	77%	66%	59%	62%	50%	74%	61%
Ensuring the safety of tap water	72%	71%	73%	100%	69%	74%	72%	72%	73%	71%	63%	73%	100%	64%	74%	83%	72%	71%	72%	79%	71%
Managing the appearance, taste & smell of tap water	63%	65%	62%	100%	62%	63%	66%	61%	68%	61%	52%	65%	100%	54%	69%	70%	58%	65%	55%	63%	66%
Managing the pressure of water in your taps & the number of unplanned interruptions	56%	59%	53%	100%	52%	58%	56%	54%	59%	56%	39%	58%	100%	47%	70%	65%	54%	54%	46%	60%	57%
Handling customers' accounts, queries, complaints & customers with special needs	55%	56%	54%	100%	50%	59%	49%	54%	55%	56%	33%	58%	100%	44%	59%	59%	55%	55%	38%	58%	57%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	60%	63%	58%	100%	50%	67%	64%	60%	61%	60%	48%	62%	100%	47%	69%	55%	63%	61%	45%	68%	61%
Avoid the risk of homes & gardens being flooded with sewerage	57%	60%	54%	100%	51%	59%	60%	53%	59%	61%	34%	60%	100%	54%	67%	64%	54%	56%	58%	58%	57%
Managing the amount of water taken from the environment to supply customers	57%	59%	55%	100%	50%	62%	53%	57%	58%	54%	34%	60%	100%	40%	63%	56%	61%	57%	52%	61%	57%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	57%	60%	54%	100%	52%	61%	54%	56%	58%	57%	36%	60%	100%	45%	63%	60%	61%	56%	50%	59%	58%
No of respondents	399	195	204	4	154	171	63	162	141	96	50	345	1	39	40	34	91	195	51	90	244

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	62%	65%	58%	100%	53%	69%	59%	59%	66%	60%	42%	65%	100%	49%	77%	63%	63%	60%	50%	73%	60%
Ensuring a reliable & continuous water supply	61%	64%	58%	100%	55%	65%	60%	57%	63%	64%	42%	63%	100%	54%	81%	64%	58%	59%	44%	72%	60%
Ensuring the safety of tap water	72%	70%	74%	100%	69%	73%	70%	71%	73%	70%	60%	74%	100%	73%	73%	81%	70%	71%	65%	77%	72%
Managing the appearance, taste & smell of tap water	64%	68%	60%	100%	63%	64%	62%	60%	69%	62%	55%	65%	100%	60%	75%	65%	60%	64%	56%	62%	66%
Managing the pressure of water in your taps & the number of unplanned interruptions	56%	60%	51%	100%	51%	59%	53%	53%	58%	57%	34%	58%	100%	50%	78%	59%	53%	53%	44%	58%	57%
Handling customers' accounts, queries, complaints & customers with special needs	54%	55%	52%	100%	49%	59%	44%	53%	53%	56%	28%	57%	100%	46%	65%	54%	53%	53%	35%	56%	57%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	60%	63%	56%	100%	49%	68%	58%	58%	60%	62%	42%	62%	100%	51%	75%	54%	61%	59%	42%	66%	61%
Avoid the risk of homes & gardens being flooded with sewerage	57%	59%	54%	100%	53%	59%	56%	52%	60%	61%	33%	60%	100%	60%	70%	61%	54%	54%	56%	57%	57%
Managing the amount of water taken from the environment to supply customers	56%	58%	54%	100%	50%	62%	48%	56%	58%	53%	31%	59%	100%	42%	67%	55%	60%	55%	49%	60%	56%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	56%	59%	53%	100%	51%	60%	48%	55%	57%	55%	30%	59%	100%	47%	65%	55%	59%	54%	47%	57%	57%
No of respondents	399	195	204	4	154	171	63	162	141	96	50	345	1	39	40	34	91	195	51	90	244

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	7%
Ensuring a reliable & continuous water supply	3%
Ensuring the safety of tap water	11%
Managing the appearance, taste & smell of tap water	9%
Managing the pressure of water in your taps & the number of unplanned interruptions	6%
Handling customers' accounts, queries, complaints & customers with special needs	5%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	7%
Avoid the risk of homes & gardens being flooded with sewerage	6%
Managing the amount of water taken from the environment to supply customers	5%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	4%
Upgrade water pipes	3%
(further) reduce limescale in water	3%
(further) reduce sewerage drainage problems	1%
Introduce option of having a water meter	1%
Speed up process of repairs	1%
Improve quality of pipe repair workmanship	2%
More water conservation education	1%
Recycle more water	1%
No, none	58%
No of respondents	399

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	3%	3%	0%	3%	5%	0%	1%	4%	6%	4%	3%	0%	0%	4%	9%	0%	5%	9%	3%	2%
Very poor value	5%	6%	4%	0%	6%	5%	2%	2%	5%	10%	5%	5%	0%	16%	4%	4%	2%	5%	8%	7%	3%
Fairly poor value	14%	15%	14%	0%	16%	13%	11%	12%	13%	20%	14%	14%	0%	22%	16%	21%	10%	13%	15%	11%	15%
Neither poor nor good value	26%	25%	27%	41%	26%	24%	31%	25%	29%	23%	28%	26%	0%	24%	26%	23%	18%	30%	34%	15%	28%
Fairly good value	36%	38%	34%	44%	34%	38%	37%	40%	34%	31%	28%	37%	0%	27%	41%	38%	46%	31%	32%	46%	35%
Very good value	5%	5%	5%	14%	6%	4%	6%	8%	3%	4%	6%	5%	0%	2%	4%	2%	13%	3%	0%	8%	5%
Extremely good value	1%	1%	1%	0%	1%	1%	0%	1%	2%	0%	3%	0%	100%	0%	0%	0%	2%	1%	0%	3%	0%
Dont know/cant say	10%	8%	12%	0%	9%	8%	14%	12%	9%	7%	12%	9%	0%	7%	5%	3%	9%	13%	3%	6%	12%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	399	195	204	4	154	171	63	162	141	96	50	345	1	39	40	34	91	195	51	90	244

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	4%	4%	0%	3%	5%	4%	2%	5%	5%	3%	4%	0%	3%	2%	7%	0%	6%	9%	5%	3%
Very poor value	6%	7%	4%	0%	7%	6%	0%	4%	4%	9%	10%	5%	0%	10%	2%	12%	4%	5%	9%	6%	5%
Fairly poor value	13%	12%	14%	0%	15%	12%	13%	10%	11%	21%	22%	12%	0%	25%	20%	8%	8%	12%	14%	15%	11%
Neither poor nor good value	24%	25%	22%	0%	27%	22%	25%	22%	27%	21%	20%	24%	0%	24%	16%	20%	25%	25%	39%	14%	25%
Fairly good value	39%	41%	38%	86%	33%	44%	38%	42%	37%	37%	27%	41%	0%	29%	52%	40%	46%	36%	28%	45%	41%
Very good value	5%	5%	5%	14%	6%	3%	6%	6%	6%	2%	3%	5%	0%	5%	4%	10%	8%	3%	0%	7%	5%
Extremely good value	1%	1%	1%	0%	0%	2%	0%	1%	2%	0%	3%	0%	100%	0%	0%	0%	3%	0%	0%	3%	0%
Dont know/cant say	9%	6%	11%	0%	9%	6%	14%	12%	7%	5%	11%	8%	0%	5%	4%	3%	5%	13%	1%	4%	11%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	399	195	204	4	154	171	63	162	141	96	50	345	1	39	40	34	91	195	51	90	244

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	4%	4%	0%	3%	6%	2%	1%	6%	7%	9%	4%	0%	5%	2%	9%	0%	6%	12%	4%	3%
Very poor value	7%	7%	6%	0%	6%	8%	4%	4%	6%	13%	10%	6%	0%	10%	10%	9%	2%	7%	12%	8%	5%
Fairly poor value	18%	17%	19%	0%	21%	17%	15%	16%	16%	24%	14%	19%	0%	24%	15%	18%	13%	20%	13%	16%	20%
Neither poor nor good value	26%	27%	25%	41%	25%	26%	28%	22%	31%	24%	25%	26%	0%	27%	28%	22%	24%	26%	36%	11%	28%
Fairly good value	31%	35%	27%	44%	27%	33%	35%	36%	30%	26%	25%	32%	0%	24%	34%	33%	43%	26%	27%	42%	30%
Very good value	5%	3%	6%	14%	7%	2%	4%	7%	4%	1%	3%	5%	0%	0%	8%	7%	10%	2%	0%	11%	3%
Extremely good value	1%	1%	1%	0%	1%	2%	0%	2%	2%	0%	3%	1%	100%	2%	0%	0%	4%	0%	0%	3%	1%
Dont know/cant say	9%	6%	12%	0%	9%	6%	11%	12%	7%	6%	10%	8%	0%	7%	2%	2%	5%	13%	0%	4%	11%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	397	195	202	4	153	171	62	162	141	95	49	345	1	39	39	34	91	195	50	90	244

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	9%	8%	0%	8%	10%	7%	5%	8%	16%	11%	8%	0%	19%	10%	7%	6%	8%	6%	12%	8%
Probably not willing to pay	17%	16%	17%	0%	20%	14%	19%	16%	16%	19%	31%	15%	0%	26%	21%	21%	8%	18%	34%	22%	11%
Probably willing to pay	54%	50%	58%	100%	52%	56%	52%	57%	54%	50%	47%	55%	0%	33%	62%	50%	58%	55%	38%	47%	61%
Definitely willing to pay	14%	19%	9%	0%	12%	16%	12%	18%	11%	9%	9%	14%	100%	12%	7%	20%	22%	10%	21%	15%	12%
Dont know/Cant say	7%	6%	8%	0%	8%	5%	10%	4%	11%	6%	2%	7%	0%	10%	0%	3%	5%	9%	2%	4%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	398	194	204	4	154	171	62	162	141	95	50	344	1	39	39	34	91	195	50	90	244

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	4%	4%	4%	0%	9%	0%	0%	0%	9%	3%	0%	5%	0%	0%	16%	8%	0%	2%	0%	3%	6%
Cost too much for improvement	47%	57%	38%	0%	56%	45%	26%	63%	48%	31%	69%	41%	0%	9%	29%	39%	88%	57%	29%	64%	43%
Cant afford it	40%	36%	45%	0%	31%	38%	74%	27%	33%	61%	31%	43%	0%	76%	55%	38%	6%	33%	55%	21%	47%
Too much & cant afford it	2%	2%	3%	0%	2%	4%	0%	0%	4%	3%	0%	3%	0%	5%	0%	15%	0%	0%	12%	0%	0%
Dont know/Cant say	6%	2%	11%	0%	2%	13%	0%	10%	5%	3%	0%	8%	0%	10%	0%	0%	6%	7%	4%	12%	4%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	98	49	49	0	42	38	16	33	32	32	21	77	0	17	12	10	13	46	19	29	46

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	9%	9%	0%	8%	11%	6%	2%	9%	21%	11%	9%	0%	30%	16%	9%	1%	8%	10%	10%	9%
Probably not willing to pay	17%	18%	16%	0%	20%	13%	23%	18%	16%	17%	35%	15%	0%	20%	16%	18%	13%	19%	29%	22%	13%
Probably willing to pay	52%	46%	57%	86%	49%	54%	51%	53%	52%	49%	43%	53%	0%	34%	57%	42%	61%	51%	40%	51%	53%
Definitely willing to pay	16%	21%	11%	14%	15%	20%	12%	22%	14%	10%	7%	18%	100%	9%	11%	29%	22%	14%	20%	16%	16%
Dont know/Cant say	6%	5%	7%	0%	8%	2%	8%	5%	9%	4%	3%	6%	0%	7%	0%	3%	3%	9%	1%	1%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	398	195	203	4	153	171	63	162	141	96	50	344	1	39	40	34	91	194	51	89	244

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	6%	5%	7%	0%	9%	2%	9%	10%	4%	5%	6%	6%	0%	4%	17%	0%	0%	7%	0%	14%	4%
Cost too much for improvement	49%	60%	38%	0%	62%	50%	15%	59%	56%	35%	62%	44%	0%	22%	27%	44%	87%	58%	30%	59%	51%
Cant afford it	40%	32%	49%	0%	30%	37%	76%	25%	35%	57%	32%	44%	0%	69%	56%	46%	6%	32%	57%	27%	41%
Too much & cant afford it	2%	2%	2%	0%	0%	4%	0%	0%	2%	3%	0%	2%	0%	5%	0%	10%	0%	0%	9%	0%	0%
Dont know/Cant say	3%	2%	4%	0%	0%	7%	0%	6%	2%	0%	0%	3%	0%	0%	0%	0%	6%	4%	4%	0%	4%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	95	49	46	0	40	37	17	30	30	34	23	71	0	19	12	8	12	44	19	26	48

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	8%	9%	0%	8%	10%	4%	3%	8%	19%	14%	8%	0%	24%	8%	11%	2%	8%	12%	10%	8%
Probably not willing to pay	19%	19%	19%	0%	22%	16%	24%	18%	20%	20%	33%	17%	0%	25%	19%	20%	15%	20%	31%	26%	14%
Probably willing to pay	53%	51%	56%	86%	49%	56%	52%	59%	53%	44%	42%	55%	0%	27%	60%	51%	56%	56%	36%	47%	59%
Definitely willing to pay	12%	16%	9%	14%	12%	13%	12%	15%	11%	10%	8%	13%	100%	14%	9%	18%	23%	6%	20%	16%	10%
Dont know/Cant say	7%	6%	7%	0%	9%	4%	7%	5%	9%	7%	3%	7%	0%	10%	4%	0%	3%	10%	2%	1%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	397	195	202	4	153	171	63	162	140	96	49	344	1	39	39	34	91	194	50	89	244

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	5%	3%	7%	0%	2%	10%	0%	5%	5%	5%	0%	6%	0%	9%	9%	0%	9%	2%	0%	6%	5%
Cost too much for improvement	47%	59%	36%	0%	61%	40%	25%	65%	50%	29%	68%	41%	0%	12%	23%	38%	81%	57%	30%	63%	44%
Cant afford it	43%	35%	50%	0%	35%	39%	75%	24%	38%	64%	32%	46%	0%	74%	68%	48%	5%	36%	55%	29%	48%
Too much & cant afford it	2%	2%	3%	0%	2%	4%	0%	0%	4%	3%	0%	3%	0%	5%	0%	14%	0%	0%	11%	0%	0%
Dont know/Cant say	3%	2%	4%	0%	0%	8%	0%	6%	4%	0%	0%	4%	0%	0%	0%	0%	5%	5%	4%	2%	4%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	101	49	53	0	43	40	17	30	36	35	23	78	0	19	10	10	15	48	21	31	46

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	15%	16%	13%	21%	16%	14%	15%	11%	9%	29%	17%	14%	0%	27%	16%	8%	13%	14%	28%	5%	14%
Not very concerned	43%	45%	42%	0%	41%	42%	56%	35%	54%	41%	33%	45%	0%	41%	55%	56%	30%	46%	38%	34%	48%
Fairly concerned	28%	26%	30%	55%	30%	31%	14%	38%	23%	18%	33%	27%	0%	18%	18%	24%	43%	26%	26%	39%	24%
Very concerned	9%	7%	11%	0%	11%	8%	10%	14%	8%	2%	13%	8%	100%	4%	5%	12%	15%	8%	9%	17%	7%
Dont know/cant say	5%	6%	3%	24%	3%	6%	6%	2%	5%	9%	4%	5%	0%	10%	6%	0%	0%	7%	0%	4%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	396	192	204	4	154	171	63	159	141	96	50	344	1	39	40	34	91	193	51	90	243

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	4%	3%	6%	0%	4%	5%	6%	4%	6%	4%	9%	4%	0%	5%	2%	2%	4%	6%	5%	7%	4%
Ensuring a reliable & continuous water supply	5%	4%	6%	14%	6%	6%	0%	6%	5%	4%	3%	5%	0%	2%	5%	9%	11%	2%	2%	14%	3%
Ensuring the safety of tap water	14%	11%	17%	0%	15%	15%	12%	20%	12%	7%	21%	13%	0%	6%	11%	19%	26%	10%	17%	32%	8%
Managing the appearance, taste & smell of tap water	3%	3%	3%	0%	4%	1%	5%	6%	2%	0%	6%	3%	0%	0%	0%	2%	6%	3%	0%	6%	3%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	2%	1%	0%	0%	2%	2%	2%	1%	0%	0%	1%	100%	0%	2%	0%	5%	0%	1%	2%	1%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	6%	3%	8%	0%	7%	5%	4%	8%	5%	3%	14%	5%	0%	5%	2%	5%	12%	4%	1%	20%	2%
Avoid the risk of homes & gardens being flooded with sewerage	3%	1%	5%	0%	6%	1%	3%	5%	2%	1%	3%	3%	0%	4%	4%	7%	5%	1%	3%	10%	0%
Managing the amount of water taken from the environment to supply customers	2%	2%	2%	0%	2%	1%	7%	4%	1%	0%	9%	1%	0%	0%	0%	0%	4%	2%	1%	5%	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%	4%	1%	0%	2%	3%	3%	4%	3%	0%	5%	2%	0%	0%	0%	2%	7%	2%	7%	6%	0%
No of respondents	399	195	204	4	154	171	63	162	141	96	50	345	1	39	40	34	91	195	51	90	244

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	14%	18%	10%	21%	13%	17%	6%	18%	12%	9%	23%	13%	0%	7%	6%	12%	25%	12%	7%	16%	14%
Bills show one big change in first year	10%	9%	11%	0%	12%	8%	11%	10%	10%	9%	8%	10%	0%	4%	16%	3%	7%	13%	0%	13%	10%
Bills change steadily every year	76%	73%	79%	79%	75%	75%	83%	72%	77%	82%	69%	77%	100%	88%	78%	85%	68%	76%	93%	71%	75%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	388	188	200	4	151	168	61	156	139	93	46	340	1	38	40	33	91	186	49	86	242

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£22)	Maintain current service (£19)	Maintain current service (£19)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£16)	Maintain current service (£14)	Maintain current service (£14)
	3. Ensuring the safety of tap water	Meet current and future standards at 11 of treatment works. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£3)	Meet current and future standards at 11 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 401,100 of water company lead pipes replaced to meet new lead stand (£3)	Meet current and future standards at 11 of treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required,784,130 of water company lead pipes replaced to meet new lead sta (£5)
	4. Managing the appearance, taste and smell of tap water	Ensure no increase in the number of customer complaints about the appearance, taste or smell of tap water (Less than £1)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (Less than £1)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (Less than £1)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (Less than £1)	Maintain current service (Less than £1)	Maintain current service (Less than £1)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£8)	Maintain current service. Ensure the network can meet new demands (£7)	Maintain current service. Ensure the network can meet new demands. (£7)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 3,691 to 1,030, Reduce the number of properties externally flooding from sewers by 1,478. Reduce the number of properties flooded from blocked sewers (£7)	Removal of all known properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (excluding that caused by blocked sewers) (£4)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£5)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (Less than £1)	65 Km of rivers can better support fish and rare wildlife, 5 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)	156 Km of rivers can better support fish and rare wildlife, 8 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	130 Km of rivers can better support fish, 50 Km of rivers can support rare wildlife (£2)	164 Km of rivers can better support fish, 62 Km of rivers can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife (£4)	439 Km of rivers can better support fish, 62 Km of rivers can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife (£7)
		Overall cost on average bill taking account of cost savings by 2010 is £43 (excluding inflation). Overall bill by 2010 is £239 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £38 (excluding inflation). Overall bill by 2010 is £234 (plus inflation)	Overall cost on average bill by 2010 is £45 (excluding inflation). Overall bill by 2010 is £241 (plus inflation)

1. Key Findings

Sutton and East Surrey Water is a water supply only company providing water services to 640,650 customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £31
Reference Plan A - £39
Reference Plan B - £45

☐ 80% of customers stated that they were satisfied with the service provided by the company and only 5% expressed dissatisfaction. 68% of customers indicated that the services provided them with good value for money and 10% said that the services represented poor value for money.

☐ Between 94% and 99% of all customers thought that it was important to maintain all service elements, particularly 'maintaining water pipes, treatments works and reservoirs', 'ensuring the safety of tap water' and 'managing the appearance, taste and smell of tap water' (all 99%). Between 86% ('managing the effect of water company activities on water quality of rivers, wetlands and coastal water') and 94% ('managing the appearance, taste and smell of tap water'), considered it important that improvements to all services are introduced by 2010.

☐ Customers approval was greatest for the Company Preferred Plan, followed by Reference Plan A, then Reference Plan B. Across all three plans, (each of which proposed a combination of maintained and improved services), the proposed output customers most wanted to see was 'ensuring the safety of tap water' (67% for Reference Plan B, 72% Reference Plan A, 79% Company Preferred Plan). The second element customers most wanted to see within the Company Preferred Plan and Reference Plan A was 'maintaining water pipes, treatment works and reservoirs' (67%-73%) followed by other priorities to 'manage the appearance taste and smell of tap water (66%-72%) and 'ensure a reliable and continuous water supply' (64%-73%). Within Reference Plan B, second and third priorities were 'managing the appearance, taste and smell of tap water (62%) and 'maintaining sewers, sewage works, ensuring the network can meet new demand and controlling smells from sewage works' (61%).

☐ 70% of customers did not wish to see any more improvements than those proposed in the three plans put forward by the company. Where a view was expressed for further improvement, this was mainly in the areas of 'ensuring the safety of tap water' (12%) and 'managing the appearance, taste and smell of tap water' (10%).

☐ Of the three proposed plans, customers regarded the Company Preferred Plan as the best value for money, with 60% considering it good value for money against 16% suggesting it was poor value for money. Reference Plan B was regarded as the poorest value for money (35% said that it represented poor value for money and 43% that it represented good value for money). When considering Reference Plan A, 52% regarded the proposals as good value for money and 25% regarded them as poor value for money.

☐ The proportions of customers indicating that they were 'willing to pay' was high for all three plans. This ranged from 54% for Reference Plan B (44% probably willing, 10% definitely willing), 64% for Reference Plan A (51% probably willing, 13% definitely willing) to 73% for the Company Preferred Plan (55% probably willing, 18% definitely willing). The proportion of customers indicating that they were 'not willing to pay' ranged between 22% for the Company Preferred Plan (14% probably not willing, 8% definitely not willing) 30% for Reference Plan A (17% probably not willing, 13% definitely not willing) and 40% for Reference Plan B (20% probably not willing, 20% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' (51% for Company Preferred Plan, 48% for Reference Plan A and 59% for Reference Plan B). Between 7% and 11% of all Sutton and East Surrey customers indicated that they could not afford the bill increases set out in the proposed company plans (7% for Company Preferred Plan, 10% for Reference Plan A and 11% for Reference Plan B).

☐ 54% of customers would be concerned if some of the planned improvements were to be delayed until after 2010, and 40% would not be concerned. Greatest concern was expressed for delays to improvements to 'ensuring the safety of tap water' (23%).

☐ 88% of Sutton and East Surrey Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of up to £8/annum), 'managing the appearance, taste and smell of tap water' (£1-£8/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (up to £8/annum).

2. Introduction

The attitudes and preferences of Sutton and East Surrey Water customers, reported in section 3, are based on a sample of 202 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban, on average, no more than once in ten years
	3. Ensuring the safety of tap water	99.83% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 996 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	43 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	4,050 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	0 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	84% of rivers are of good, 11% fair and 5% poor quality.100% of designated bathing waters meet minimum standards and 73% meet higher standards.86% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £214 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very dissatisfied	0%	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%
Fairly dissatisfied	5%	3%	7%	0%	5%	3%	8%	3%	4%	11%	10%	3%	0%	11%	5%	5%	4%	4%	0%	5%	5%
Neither satisfied nor dissatisfied	14%	17%	11%	0%	13%	17%	9%	13%	14%	15%	12%	14%	70%	27%	10%	11%	14%	13%	0%	20%	11%
Fairly satisfied	38%	30%	46%	50%	48%	34%	29%	37%	37%	43%	42%	37%	30%	34%	60%	33%	40%	33%	0%	38%	39%
Very satisfied	31%	35%	27%	50%	23%	32%	42%	39%	25%	24%	30%	32%	0%	23%	20%	38%	36%	28%	0%	26%	34%
Extremely satisfied	11%	13%	9%	0%	10%	12%	12%	7%	17%	7%	6%	13%	0%	5%	5%	13%	6%	18%	0%	10%	11%
Dont know/cant say	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very poor value	3%	5%	0%	0%	1%	3%	4%	2%	4%	3%	2%	3%	0%	0%	5%	0%	2%	4%	0%	3%	3%
Fairly poor value	7%	8%	6%	0%	8%	9%	4%	7%	5%	13%	8%	7%	0%	13%	10%	0%	8%	6%	0%	5%	8%
Neither poor nor good value	22%	25%	19%	0%	16%	27%	23%	23%	26%	11%	19%	23%	0%	15%	5%	21%	22%	28%	0%	26%	20%
Fairly good value	42%	36%	49%	100%	44%	40%	41%	40%	46%	40%	37%	43%	100%	52%	63%	60%	39%	32%	0%	44%	42%
Very good value	21%	22%	20%	0%	25%	17%	22%	27%	14%	19%	27%	19%	0%	10%	10%	16%	28%	20%	0%	20%	21%
Extremely good value	5%	4%	5%	0%	5%	4%	6%	2%	4%	10%	7%	4%	0%	5%	6%	4%	0%	9%	0%	3%	5%
Dont know/cant say	1%	0%	2%	0%	1%	0%	0%	0%	0%	4%	0%	1%	0%	5%	0%	0%	0%	1%	0%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	99%	100%	97%	100%	97%	99%	100%	99%	98%	100%	100%	98%	100%	100%	100%	96%	97%	100%	0%	98%	99%
Ensuring a reliable & continuous water supply	98%	98%	98%	100%	99%	99%	95%	97%	98%	100%	100%	97%	100%	100%	100%	92%	99%	98%	0%	96%	99%
Ensuring the safety of tap water	99%	100%	98%	100%	99%	99%	100%	100%	99%	98%	98%	99%	100%	100%	95%	96%	100%	100%	0%	99%	99%
Managing the appearance, taste & smell of tap water	99%	99%	99%	100%	100%	99%	97%	99%	99%	100%	100%	99%	100%	100%	100%	92%	100%	100%	0%	99%	99%
Managing the pressure of water in your taps & the number of unplanned interruptions	98%	100%	96%	100%	96%	99%	100%	99%	96%	100%	99%	98%	100%	100%	100%	96%	96%	99%	0%	97%	99%
Handling customers' accounts, queries, complaints & customers with special needs	94%	93%	96%	50%	94%	93%	98%	95%	92%	97%	99%	93%	100%	93%	89%	93%	92%	99%	0%	91%	96%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	96%	97%	95%	50%	96%	95%	98%	96%	96%	98%	99%	95%	100%	95%	95%	96%	92%	100%	0%	94%	97%
Avoid the risk of homes & gardens being flooded with sewerage	97%	98%	96%	100%	98%	95%	100%	97%	97%	98%	100%	96%	100%	100%	100%	96%	94%	99%	0%	94%	99%
Managing the amount of water taken from the environment to supply customers	95%	95%	95%	50%	94%	95%	98%	95%	94%	98%	97%	94%	100%	100%	100%	89%	90%	100%	0%	92%	97%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	94%	94%	94%	50%	92%	94%	98%	94%	94%	94%	96%	93%	100%	100%	94%	89%	89%	99%	0%	91%	96%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	87%	90%	84%	50%	84%	89%	93%	88%	88%	83%	92%	86%	100%	95%	84%	91%	79%	93%	0%	91%	85%
Ensuring a reliable & continuous water supply	88%	89%	88%	50%	87%	89%	95%	89%	89%	85%	93%	87%	100%	100%	84%	97%	82%	91%	0%	89%	88%
Ensuring the safety of tap water	91%	90%	91%	50%	91%	92%	93%	94%	89%	85%	92%	91%	100%	95%	89%	97%	86%	93%	0%	92%	90%
Managing the appearance, taste & smell of tap water	94%	96%	92%	50%	91%	96%	96%	99%	90%	91%	96%	93%	100%	100%	90%	91%	91%	98%	0%	97%	92%
Managing the pressure of water in your taps & the number of unplanned interruptions	87%	88%	86%	50%	86%	87%	97%	90%	86%	85%	94%	85%	100%	96%	84%	94%	80%	92%	0%	86%	88%
Handling customers' accounts, queries, complaints & customers with special needs	87%	87%	87%	50%	83%	89%	95%	90%	81%	90%	94%	84%	100%	91%	95%	81%	82%	90%	0%	85%	88%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	90%	89%	90%	50%	90%	89%	97%	88%	90%	92%	99%	87%	100%	100%	95%	92%	83%	93%	0%	86%	92%
Avoid the risk of homes & gardens being flooded with sewerage	90%	89%	91%	50%	90%	90%	97%	93%	88%	90%	94%	89%	100%	96%	89%	92%	86%	93%	0%	88%	91%
Managing the amount of water taken from the environment to supply customers	91%	88%	94%	0%	93%	89%	97%	93%	88%	91%	95%	90%	100%	100%	88%	88%	88%	94%	0%	90%	91%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	86%	83%	89%	0%	90%	84%	90%	88%	85%	84%	92%	85%	100%	95%	79%	88%	84%	89%	0%	88%	85%
No of respondents	193	93	100	2	71	78	38	83	71	39	48	142	2	16	19	22	69	66	0	69	123

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	73%	74%	73%	50%	74%	72%	78%	82%	62%	77%	75%	73%	100%	67%	86%	54%	86%	66%	0%	69%	76%
Ensuring a reliable & continuous water supply	73%	74%	73%	100%	71%	72%	80%	79%	66%	75%	85%	69%	100%	77%	91%	61%	82%	64%	0%	67%	77%
Ensuring the safety of tap water	79%	78%	79%	100%	76%	81%	79%	85%	71%	78%	83%	77%	100%	72%	79%	74%	90%	70%	0%	77%	80%
Managing the appearance, taste & smell of tap water	72%	73%	71%	100%	66%	73%	80%	80%	66%	66%	82%	69%	100%	67%	74%	64%	82%	66%	0%	66%	76%
Managing the pressure of water in your taps & the number of unplanned interruptions	69%	72%	66%	100%	61%	72%	77%	76%	61%	68%	78%	66%	100%	77%	69%	58%	78%	62%	0%	63%	73%
Handling customers' accounts, queries, complaints & customers with special needs	66%	65%	67%	50%	62%	68%	71%	75%	57%	64%	69%	65%	100%	62%	65%	57%	75%	61%	0%	60%	70%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	72%	72%	72%	50%	67%	73%	81%	78%	65%	73%	81%	69%	100%	77%	75%	59%	79%	69%	0%	65%	77%
Avoid the risk of homes & gardens being flooded with sewerage	71%	71%	72%	50%	67%	74%	74%	78%	61%	77%	71%	71%	100%	67%	81%	62%	80%	64%	0%	63%	76%
Managing the amount of water taken from the environment to supply customers	66%	65%	67%	50%	60%	69%	73%	73%	57%	69%	74%	63%	100%	72%	59%	57%	78%	58%	0%	56%	72%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	66%	67%	65%	50%	60%	68%	74%	76%	58%	59%	78%	62%	100%	61%	54%	59%	77%	62%	0%	60%	70%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	67%	68%	66%	100%	66%	64%	72%	75%	57%	68%	76%	64%	100%	57%	76%	50%	79%	61%	0%	62%	70%
Ensuring a reliable & continuous water supply	64%	63%	65%	100%	62%	61%	73%	69%	61%	61%	74%	61%	100%	61%	63%	57%	74%	59%	0%	57%	69%
Ensuring the safety of tap water	72%	72%	73%	100%	73%	69%	77%	78%	67%	69%	78%	71%	100%	61%	69%	61%	88%	64%	0%	69%	75%
Managing the appearance, taste & smell of tap water	66%	63%	68%	100%	65%	61%	75%	73%	59%	61%	77%	62%	100%	55%	64%	56%	77%	60%	0%	58%	70%
Managing the pressure of water in your taps & the number of unplanned interruptions	61%	60%	61%	100%	56%	59%	71%	69%	55%	53%	69%	58%	100%	56%	52%	50%	73%	56%	0%	55%	64%
Handling customers' accounts, queries, complaints & customers with special needs	56%	52%	60%	100%	51%	56%	61%	62%	49%	53%	62%	53%	100%	46%	47%	50%	67%	51%	0%	46%	62%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	64%	60%	67%	100%	61%	60%	74%	69%	60%	61%	71%	61%	100%	61%	58%	56%	72%	61%	0%	54%	70%
Avoid the risk of homes & gardens being flooded with sewerage	65%	62%	69%	100%	62%	63%	75%	72%	56%	69%	74%	62%	100%	66%	71%	58%	74%	58%	0%	54%	72%
Managing the amount of water taken from the environment to supply customers	58%	56%	60%	100%	56%	58%	61%	65%	52%	54%	63%	56%	100%	51%	49%	60%	69%	51%	0%	48%	64%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	59%	58%	59%	100%	53%	60%	64%	68%	51%	52%	66%	56%	100%	51%	43%	59%	70%	53%	0%	52%	62%
No of respondents	201	98	103	2	73	79	44	87	75	39	49	149	2	16	19	25	70	72	0	72	128

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	60%	58%	62%	50%	57%	60%	67%	69%	52%	54%	62%	59%	100%	45%	37%	48%	73%	61%	0%	58%	62%
Ensuring a reliable & continuous water supply	60%	57%	63%	50%	58%	58%	70%	68%	54%	57%	71%	56%	100%	50%	37%	51%	72%	60%	0%	56%	63%
Ensuring the safety of tap water	67%	64%	70%	100%	64%	68%	70%	74%	60%	63%	71%	65%	100%	46%	43%	56%	85%	64%	0%	63%	69%
Managing the appearance, taste & smell of tap water	62%	58%	66%	100%	58%	61%	71%	71%	57%	53%	72%	58%	100%	44%	43%	50%	76%	62%	0%	60%	64%
Managing the pressure of water in your taps & the number of unplanned interruptions	57%	54%	59%	50%	52%	58%	64%	65%	49%	53%	64%	54%	100%	45%	37%	41%	69%	58%	0%	50%	61%
Handling customers' accounts, queries, complaints & customers with special needs	54%	47%	60%	50%	52%	53%	59%	62%	46%	49%	60%	51%	100%	35%	37%	44%	67%	53%	0%	45%	59%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	61%	59%	62%	50%	55%	61%	70%	68%	51%	62%	67%	58%	100%	46%	44%	47%	72%	61%	0%	56%	64%
Avoid the risk of homes & gardens being flooded with sewerage	57%	51%	63%	100%	53%	59%	62%	63%	49%	61%	63%	55%	100%	45%	49%	47%	68%	56%	0%	46%	64%
Managing the amount of water taken from the environment to supply customers	54%	52%	57%	50%	51%	58%	53%	64%	45%	51%	57%	53%	100%	31%	39%	50%	68%	52%	0%	45%	60%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	56%	55%	56%	50%	54%	57%	57%	66%	48%	48%	60%	54%	100%	35%	39%	50%	68%	55%	0%	51%	59%
No of respondents	201	98	103	2	73	79	44	87	75	39	49	149	2	16	19	25	70	72	0	72	128

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	2%
Ensuring a reliable & continuous water supply	5%
Ensuring the safety of tap water	12%
Managing the appearance, taste & smell of tap water	10%
Managing the pressure of water in your taps & the number of unplanned interruptions	4%
Handling customers' accounts, queries, complaints & customers with special needs	1%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	4%
Avoid the risk of homes & gardens being flooded with sewerage	7%
Managing the amount of water taken from the environment to supply customers	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%
Upgrade water pipes	1%
(further) reduce limescale in water	1%
(further) reduce sewerage drainage problems	1%
Introduce option of having a water meter	2%
(further) reduce sewerage treatment works smells	1%
(further) improve cleanliness of the rivers	1%
No, none	70%
No of respondents	202

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	6%	1%	0%	1%	7%	0%	2%	6%	0%	2%	3%	0%	6%	5%	0%	1%	4%	0%	4%	3%
Very poor value	4%	4%	3%	0%	3%	6%	0%	4%	4%	2%	5%	3%	0%	0%	0%	4%	3%	6%	0%	8%	1%
Fairly poor value	9%	9%	9%	0%	10%	9%	8%	3%	12%	17%	1%	12%	0%	32%	5%	8%	2%	12%	0%	8%	9%
Neither poor nor good value	20%	20%	21%	0%	27%	12%	23%	20%	19%	24%	21%	20%	30%	37%	20%	17%	13%	26%	0%	21%	20%
Fairly good value	43%	35%	50%	50%	45%	41%	43%	46%	41%	39%	50%	40%	70%	21%	49%	47%	58%	30%	0%	48%	40%
Very good value	14%	18%	11%	50%	13%	18%	9%	20%	9%	10%	13%	15%	0%	0%	16%	18%	19%	11%	0%	6%	19%
Extremely good value	3%	5%	2%	0%	0%	4%	8%	3%	4%	2%	6%	3%	0%	5%	0%	6%	2%	4%	0%	4%	3%
Dont know/cant say	4%	4%	4%	0%	0%	3%	9%	3%	4%	5%	2%	4%	0%	0%	5%	0%	2%	7%	0%	1%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	200	97	103	2	72	79	44	87	74	39	50	147	2	16	19	25	71	70	0	71	128

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	4%	3%	0%	1%	7%	0%	1%	7%	0%	2%	4%	0%	6%	5%	4%	3%	2%	0%	6%	1%
Very poor value	4%	4%	4%	0%	11%	1%	0%	6%	3%	2%	2%	5%	0%	0%	0%	11%	1%	7%	0%	9%	2%
Fairly poor value	18%	23%	12%	0%	15%	20%	18%	13%	17%	29%	11%	20%	0%	28%	30%	15%	8%	22%	0%	13%	20%
Neither poor nor good value	17%	14%	21%	0%	19%	12%	22%	15%	21%	15%	18%	17%	30%	18%	23%	13%	20%	14%	0%	19%	16%
Fairly good value	39%	36%	42%	50%	42%	40%	36%	45%	35%	35%	53%	35%	70%	25%	41%	45%	52%	28%	0%	38%	40%
Very good value	10%	12%	9%	50%	9%	12%	8%	12%	11%	5%	9%	11%	0%	0%	0%	13%	11%	13%	0%	8%	12%
Extremely good value	3%	4%	2%	0%	2%	2%	6%	5%	1%	2%	4%	2%	0%	0%	0%	0%	2%	5%	0%	4%	2%
Dont know/cant say	5%	3%	7%	0%	1%	6%	9%	3%	5%	12%	2%	6%	0%	23%	0%	0%	2%	8%	0%	3%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	6%	5%	7%	0%	7%	8%	3%	7%	7%	2%	9%	5%	0%	7%	0%	5%	6%	8%	0%	13%	2%
Very poor value	11%	13%	8%	0%	11%	13%	5%	10%	9%	15%	0%	14%	0%	19%	5%	23%	6%	10%	0%	11%	10%
Fairly poor value	18%	21%	15%	0%	27%	10%	17%	17%	19%	18%	22%	16%	0%	21%	31%	10%	14%	20%	0%	19%	16%
Neither poor nor good value	17%	13%	20%	50%	13%	17%	16%	12%	23%	15%	12%	18%	30%	4%	18%	18%	16%	20%	0%	19%	16%
Fairly good value	34%	29%	38%	50%	32%	33%	38%	38%	29%	35%	44%	30%	70%	32%	28%	45%	42%	24%	0%	27%	38%
Very good value	6%	9%	4%	0%	6%	10%	3%	7%	6%	6%	6%	7%	0%	0%	6%	0%	9%	8%	0%	2%	9%
Extremely good value	3%	4%	2%	0%	2%	2%	6%	5%	1%	2%	4%	2%	0%	0%	0%	0%	2%	5%	0%	4%	2%
Dont know/cant say	6%	6%	6%	0%	3%	7%	11%	4%	7%	8%	3%	7%	0%	17%	12%	0%	4%	7%	0%	5%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	201	98	103	2	72	80	44	87	76	38	50	148	2	15	19	25	71	72	0	73	127

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	8%	10%	6%	0%	11%	9%	3%	4%	14%	5%	2%	10%	0%	23%	9%	18%	3%	6%	0%	10%	7%
Probably not willing to pay	14%	14%	14%	0%	12%	16%	13%	8%	14%	28%	5%	17%	30%	16%	9%	7%	6%	24%	0%	11%	15%
Probably willing to pay	55%	52%	58%	50%	68%	45%	53%	62%	52%	45%	70%	50%	70%	41%	70%	62%	67%	40%	0%	62%	51%
Definitely willing to pay	18%	22%	13%	50%	9%	28%	13%	23%	12%	16%	14%	19%	0%	5%	12%	13%	21%	20%	0%	15%	19%
Dont know/Cant say	6%	3%	8%	0%	0%	3%	18%	3%	9%	6%	9%	4%	0%	15%	0%	0%	3%	10%	0%	2%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	201	98	103	2	73	79	44	87	75	39	50	148	2	16	19	25	71	71	0	72	128

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	0	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	17%	18%	16%	0%	21%	15%	17%	26%	25%	0%	0%	19%	0%	0%	29%	35%	30%	11%	0%	19%	14%
Cost too much for improvement	51%	60%	42%	0%	48%	65%	30%	61%	55%	38%	100%	48%	100%	35%	25%	65%	59%	54%	0%	61%	48%
Cant afford it	30%	22%	38%	0%	27%	20%	54%	13%	16%	62%	0%	32%	0%	65%	46%	0%	0%	34%	0%	20%	35%
Dont know/Cant say	2%	0%	4%	0%	5%	0%	0%	0%	4%	0%	0%	2%	0%	0%	0%	0%	11%	0%	0%	0%	3%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	42	22	20	0	15	19	7	9	20	13	2	39	1	6	3	6	6	19	0	14	27

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	13%	12%	13%	0%	16%	13%	5%	7%	16%	19%	2%	16%	0%	40%	19%	19%	3%	12%	0%	12%	13%
Probably not willing to pay	17%	22%	13%	0%	19%	20%	13%	14%	21%	19%	12%	19%	30%	10%	10%	13%	10%	30%	0%	22%	14%
Probably willing to pay	51%	45%	57%	100%	59%	42%	52%	58%	44%	47%	69%	45%	70%	34%	67%	64%	67%	30%	0%	50%	51%
Definitely willing to pay	13%	16%	9%	0%	6%	20%	12%	16%	9%	10%	8%	14%	0%	5%	0%	4%	16%	18%	0%	10%	14%
Dont know/Cant say	7%	5%	8%	0%	0%	5%	18%	4%	10%	5%	9%	5%	0%	12%	4%	0%	5%	10%	0%	6%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	0	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	20%	16%	25%	0%	22%	21%	9%	40%	15%	5%	29%	19%	0%	0%	18%	25%	21%	23%	0%	37%	8%
Cost too much for improvement	48%	55%	40%	0%	57%	43%	45%	43%	63%	27%	71%	45%	100%	27%	52%	49%	79%	44%	0%	40%	52%
Cant afford it	32%	29%	35%	0%	21%	36%	46%	17%	22%	68%	0%	36%	0%	73%	29%	26%	0%	33%	0%	23%	39%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	58	32	26	0	24	25	8	17	27	15	6	52	1	8	5	8	9	28	0	23	34

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	20%	21%	18%	0%	26%	22%	5%	14%	23%	26%	4%	25%	0%	45%	31%	21%	10%	19%	0%	19%	20%
Probably not willing to pay	20%	24%	16%	0%	23%	17%	21%	18%	19%	25%	27%	17%	30%	17%	20%	17%	16%	25%	0%	28%	14%
Probably willing to pay	44%	37%	51%	100%	46%	39%	48%	49%	40%	41%	52%	41%	70%	33%	43%	58%	54%	33%	0%	34%	50%
Definitely willing to pay	10%	14%	7%	0%	3%	17%	12%	13%	8%	8%	10%	10%	0%	5%	6%	0%	14%	13%	0%	11%	10%
Dont know/Cant say	6%	5%	8%	0%	2%	5%	14%	6%	10%	0%	6%	6%	0%	0%	0%	4%	7%	10%	0%	7%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	0	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	12%	15%	9%	0%	10%	20%	0%	18%	12%	6%	13%	13%	0%	0%	23%	0%	21%	12%	0%	19%	7%
Cost too much for improvement	59%	61%	57%	0%	61%	54%	73%	62%	74%	32%	87%	53%	100%	20%	57%	77%	79%	57%	0%	60%	60%
Cant afford it	28%	24%	33%	0%	29%	26%	27%	20%	14%	62%	0%	34%	0%	80%	20%	23%	0%	31%	0%	21%	34%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	76	41	35	0	33	31	11	25	31	20	13	63	1	10	9	9	17	31	0	31	44

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	15%	16%	15%	50%	15%	10%	21%	8%	22%	18%	13%	16%	0%	13%	10%	20%	7%	23%	0%	14%	16%
Not very concerned	25%	23%	28%	0%	26%	17%	38%	28%	22%	24%	36%	21%	30%	34%	25%	25%	27%	22%	0%	31%	22%
Fairly concerned	35%	37%	34%	50%	35%	44%	20%	39%	33%	31%	35%	35%	70%	17%	36%	22%	48%	31%	0%	38%	33%
Very concerned	19%	19%	18%	0%	20%	21%	15%	24%	13%	18%	14%	21%	0%	36%	14%	30%	18%	13%	0%	11%	23%
Dont know/cant say	6%	5%	6%	0%	4%	7%	6%	1%	9%	8%	1%	7%	0%	0%	14%	3%	0%	11%	0%	6%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	8%	4%	12%	0%	12%	8%	2%	10%	8%	4%	5%	9%	0%	5%	5%	13%	13%	3%	0%	7%	9%
Ensuring a reliable & continuous water supply	9%	8%	9%	0%	11%	8%	7%	13%	6%	4%	7%	8%	70%	10%	3%	13%	17%	0%	0%	9%	9%
Ensuring the safety of tap water	23%	21%	24%	50%	29%	19%	18%	25%	20%	22%	27%	20%	70%	32%	29%	20%	30%	12%	0%	17%	26%
Managing the appearance, taste & smell of tap water	6%	4%	7%	0%	5%	6%	6%	5%	3%	12%	13%	3%	0%	5%	6%	7%	5%	5%	0%	5%	6%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	2%	0%	0%	2%	0%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	2%	0%	0%	2%	0%
Handling customers' accounts, queries, complaints & customers with special needs	1%	1%	1%	0%	1%	2%	0%	0%	3%	0%	0%	2%	0%	0%	3%	4%	1%	0%	0%	0%	2%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	9%	9%	9%	0%	14%	9%	0%	12%	5%	10%	16%	7%	0%	5%	17%	0%	14%	6%	0%	2%	12%
Avoid the risk of homes & gardens being flooded with sewerage	4%	3%	5%	0%	6%	4%	3%	6%	3%	4%	2%	5%	0%	0%	5%	8%	8%	0%	0%	2%	6%
Managing the amount of water taken from the environment to supply customers	2%	3%	2%	0%	0%	5%	0%	2%	1%	5%	1%	2%	0%	0%	5%	0%	3%	1%	0%	1%	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	5%	6%	4%	0%	5%	8%	0%	9%	2%	0%	2%	6%	0%	0%	0%	4%	11%	2%	0%	5%	5%
No of respondents	202	99	103	2	73	80	44	87	76	39	50	149	2	16	19	25	71	72	0	73	128

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	8%	9%	7%	0%	5%	9%	11%	13%	3%	4%	4%	9%	0%	0%	5%	6%	13%	6%	0%	7%	8%
Bills show one big change in first year	5%	6%	3%	0%	8%	4%	1%	7%	3%	3%	13%	2%	0%	0%	0%	11%	7%	2%	0%	8%	3%
Bills change steadily every year	88%	85%	90%	100%	87%	87%	88%	80%	94%	93%	82%	89%	100%	100%	95%	83%	80%	92%	0%	85%	89%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%
	197	96	102	2	73	77	43	86	74	38	50	144	2	15	19	25	71	68	0	72	125

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£37)	Maintain current service (£31)	Maintain current service (£31)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	3. Ensuring the safety of tap water	Meet current and future standards at 1 of treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 3,000 of water company lead pipes replaced to meet new lead stand (£1)	Meet current and future standards at 1 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 39,660 of water company lead pipes replaced to meet new lead standard (£8)	Meet current and future standards at 1 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required. 39,660 of water company lead pipes replaced to meet new lead standard (£0)
	4. Managing the appearance, taste and smell of tap water	Ensure no increase in the levels of customer complaints about the appearance, taste or smell of tap water (£2)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£1)	Ensure no increase in the level of customer complaints about the appearance, taste or smell of tap water (£8)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£1)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works.Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£8)	Maintain current service (£7)	Maintain current service (£0)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 3,521 to 1,030. Reduce the number of properties externally flooding from sewers by 1,478 (£7)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£4)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£7)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£0)	164 Km of rivers can better support fish and rare wildlife, 62 wetlands and lakes are restored and protected to support rare wildlife (£5)	164 Km of rivers can better support fish and rare wildlife, 62 wetlands and lakes are restored and protected to support rare wildlife (£5)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	130 Km of rivers can better support fish, 50 Km of rivers can support rare wildlife. (£2)	164 Km of rivers can better support fish, 62 Km of rivers can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife. (£4)	439 Km of rivers can better support fish, 62 Km of rivers can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife. (£5)
		Overall cost on average bill by 2010, taking account of cost savings, is £32 (plus inflation). Overall bill by 2010 is £246 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £39 (plus inflation). Overall bill by 2010 is £253 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £45 (plus inflation)Overall bill by 2010 is £259 (plus inflation)

1. Key Findings

Three Valleys Water is a water supply only company providing water services to just over 3 million customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £41
Reference Plan A - £19
Reference Plan B - £24

☐ 78% of customers indicated that they were satisfied with the current service provided by the company, with 10% expressing dissatisfaction. 56% of customers stated that the service was good value for money, and 17% said that it was poor value for money.

☐ Customers thought it most important to maintain 'a reliable and continuous water supply' (86%), 'the safety of tap water' (83%) and 'the pressure of water in taps and the number of unplanned interruptions' (81%). Lower priority was given to 'handling customer accounts, queries, complaints and customers with special needs' (72%). Significantly fewer (33%-64%) customers regarded it important to introduce improvements to all services by 2010. The one service element they considered it most important to improve in this time frame was 'management of the appearance, taste and smell of tap water' (64%).

☐ The level of customer support was similar for all three company plans (each of which proposed a combination of maintained and improved services). The two elements customers would most like to see proposed outputs for were 'ensuring the safety of tap water' (62%-64%) and 'managing the appearance, taste and smell of tap water' (60%-62%). Following these two, priorities amongst the three plans diverged, with 'maintaining sewers, sewage treatment works, ensuring the network meets new demands and controlling smells from sewage works' the third priority (56%) within the Company Preferred Plan, 'managing the pressure of water in the taps and the number of unplanned interruptions' third (55%) within Reference Plan A, and 'ensuring a reliable and continuous water supply' third (58%) within Reference Plan B.

☐ 64% of customers did not wish to see improvements beyond those proposed in the plans, but 12% did express a wish to see further improvement in 'managing the appearance, taste and smell of tap water'.

☐ 46% and 42% of customers regarded Reference Plan A and Reference Plan B respectively as good value for money whereas only 34% of customers thought the Company Preferred Plan to be good value for money. Conversely 20% and 21% of customers regarded Reference Plan A and Reference Plan B respectively as poor value for money and 32% of customers thought the Company Preferred Plan represented poor value for money.

☐ Customers indicated high levels of willingness to pay for all three plans. This ranged from 60% for the Company Preferred Plan (48% probably willing, 12% definitely willing), 67% for Reference Plan A (57% probably willing, 10% definitely willing) to 69% for Reference Plan B (56% probably willing, 13% definitely willing). The proportion of customers indicating that they were 'not willing to pay' ranged between a low of 20% for Reference Plan B (9% probably not willing, 11% definitely not willing) 22% for Reference Plan A (14% probably not willing, 8% definitely not willing) and 26% for the Company Preferred Plan (17% probably not willing, 9% definitely not willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because the 'cost was too much for the improvements' in all Plans (56% for Company Preferred Plan, 37% for Reference Plan A and 50% for Reference Plan B). 35% of customers thought the improvements were not good enough in Reference Plan A. Between 4% and 5% of all Three Valley Water customers indicated that they could not afford the bill increases set out in the proposed company plans (4% for the Company Preferred Plan and Reference Plan B and 5% for Reference Plan A).

☐ 53% of customers said that they would not be concerned if some improvements had to be delayed, and 32% would be concerned. 'Ensuring the safety of tap water' was identified as the area customers would be most concerned about if there was a delay to improvements (9% of customers).

☐ 67% of Three Valley Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year. 20% of customers reported that their preference would be to see one big change in the first year, and then see the same bill for the following four years.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the four which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £1-£3/annum), 'managing the appearance, taste and smell of tap water' (up to £2/annum), 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£8/annum), and ‘managing the amount of water taken from the environment to supply customers’ (£1/annum).

2. Introduction

The attitudes and preferences of Three Valleys Water customers, reported in section 3, are based on a sample of 200 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.82% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 1300 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	250 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99% of billing enquiries answered within 5 days and 99.4% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	4,050 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	11 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	84% of rivers are of good, 11% fair and 5% poor quality.100% of designated bathing waters meet minimum standards and 73% meet higher standards.86% of rivers may be at risk from weed growth that can adversely affect wildlife

Average bill in this area = £207 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	2%	3%	1%	0%	0%	3%	2%	2%	2%	2%	0%	2%	0%	14%	4%	0%	2%	1%	6%	3%	0%
Very dissatisfied	2%	3%	1%	0%	0%	4%	0%	0%	1%	7%	0%	2%	0%	0%	5%	3%	0%	2%	4%	3%	0%
Fairly dissatisfied	6%	3%	8%	0%	7%	5%	2%	7%	7%	0%	7%	5%	0%	0%	0%	3%	9%	5%	13%	7%	1%
Neither satisfied nor dissatisfied	11%	14%	8%	0%	12%	11%	10%	11%	13%	7%	13%	11%	0%	0%	8%	16%	6%	14%	17%	10%	10%
Fairly satisfied	39%	35%	42%	100%	35%	40%	42%	44%	34%	38%	41%	38%	100%	66%	38%	21%	34%	45%	37%	40%	37%
Very satisfied	31%	31%	32%	0%	31%	30%	36%	31%	32%	31%	39%	31%	0%	20%	32%	46%	36%	25%	14%	31%	38%
Extremely satisfied	8%	7%	8%	0%	11%	6%	5%	5%	9%	9%	0%	9%	0%	0%	9%	10%	11%	5%	5%	6%	10%
Dont know/cant say	2%	4%	1%	0%	4%	0%	2%	0%	2%	7%	0%	3%	0%	0%	5%	0%	2%	3%	3%	1%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	3%	1%	0%	0%	3%	3%	0%	1%	7%	0%	2%	0%	0%	0%	0%	0%	4%	8%	1%	1%
Very poor value	3%	4%	1%	0%	3%	4%	0%	2%	3%	4%	0%	3%	0%	0%	5%	3%	1%	4%	4%	4%	1%
Fairly poor value	12%	10%	13%	0%	10%	14%	10%	9%	9%	20%	8%	12%	0%	0%	10%	7%	8%	16%	3%	10%	14%
Neither poor nor good value	17%	18%	17%	0%	21%	16%	14%	20%	17%	13%	16%	18%	0%	0%	21%	20%	18%	16%	15%	19%	17%
Fairly good value	43%	39%	47%	0%	42%	44%	42%	37%	53%	38%	34%	44%	0%	100%	49%	43%	46%	36%	53%	43%	41%
Very good value	12%	14%	11%	100%	7%	13%	19%	22%	5%	9%	32%	10%	0%	0%	0%	15%	18%	11%	10%	9%	18%
Extremely good value	1%	1%	1%	0%	2%	0%	0%	0%	2%	0%	0%	1%	0%	0%	0%	3%	1%	0%	0%	1%	1%
Dont know/cant say	10%	11%	9%	0%	14%	7%	12%	11%	10%	9%	10%	10%	100%	0%	14%	10%	7%	12%	7%	13%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	75%	73%	77%	0%	73%	75%	86%	73%	80%	70%	69%	76%	0%	80%	81%	63%	76%	76%	95%	73%	70%
Ensuring a reliable & continuous water supply	86%	85%	86%	0%	86%	86%	93%	91%	87%	76%	84%	86%	0%	80%	80%	74%	91%	87%	100%	93%	73%
Ensuring the safety of tap water	83%	84%	83%	0%	84%	85%	81%	85%	87%	75%	87%	83%	100%	80%	81%	76%	92%	80%	95%	86%	77%
Managing the appearance, taste & smell of tap water	75%	76%	73%	0%	74%	77%	75%	73%	79%	71%	81%	74%	100%	80%	81%	63%	73%	78%	82%	68%	80%
Managing the pressure of water in your taps & the number of unplanned interruptions	81%	83%	80%	0%	74%	86%	89%	83%	84%	73%	77%	82%	0%	46%	69%	74%	87%	84%	94%	86%	71%
Handling customers' accounts, queries, complaints & customers with special needs	72%	70%	74%	0%	73%	72%	71%	77%	75%	56%	74%	72%	0%	58%	58%	63%	82%	70%	86%	74%	64%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	81%	80%	83%	0%	78%	83%	90%	81%	86%	73%	97%	80%	0%	80%	63%	76%	89%	82%	100%	84%	73%
Avoid the risk of homes & gardens being flooded with sewerage	80%	77%	83%	0%	77%	84%	83%	83%	84%	68%	84%	80%	100%	80%	74%	70%	86%	80%	97%	81%	74%
Managing the amount of water taken from the environment to supply customers	75%	70%	81%	0%	77%	73%	83%	72%	84%	67%	63%	77%	100%	80%	68%	68%	73%	80%	92%	75%	70%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	75%	68%	83%	0%	76%	73%	83%	67%	85%	72%	77%	75%	100%	80%	66%	72%	72%	81%	88%	73%	73%
No of respondents	191	94	98	1	69	89	30	76	71	44	21	169	1	5	20	21	60	85	22	90	76

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	41%	49%	34%	0%	34%	53%	28%	39%	54%	25%	44%	41%	0%	40%	24%	50%	53%	35%	65%	50%	23%
Ensuring a reliable & continuous water supply	33%	37%	29%	0%	31%	40%	20%	28%	48%	18%	34%	33%	0%	40%	20%	47%	41%	26%	61%	41%	13%
Ensuring the safety of tap water	46%	48%	44%	0%	42%	54%	35%	40%	60%	34%	50%	45%	100%	40%	38%	64%	51%	40%	64%	51%	34%
Managing the appearance, taste & smell of tap water	64%	69%	59%	0%	63%	67%	63%	62%	70%	55%	61%	64%	100%	67%	61%	56%	78%	57%	84%	68%	49%
Managing the pressure of water in your taps & the number of unplanned interruptions	40%	48%	31%	0%	38%	46%	28%	36%	54%	22%	36%	40%	0%	20%	20%	57%	50%	34%	66%	44%	26%
Handling customers' accounts, queries, complaints & customers with special needs	33%	37%	30%	0%	27%	42%	26%	30%	45%	21%	30%	34%	0%	50%	15%	38%	40%	31%	63%	45%	10%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	34%	39%	30%	0%	27%	44%	20%	26%	51%	22%	24%	36%	0%	40%	24%	48%	40%	29%	62%	46%	11%
Avoid the risk of homes & gardens being flooded with sewerage	35%	36%	34%	0%	31%	43%	22%	27%	49%	25%	24%	36%	0%	40%	24%	48%	37%	32%	66%	44%	14%
Managing the amount of water taken from the environment to supply customers	37%	39%	35%	0%	35%	42%	29%	34%	47%	25%	43%	36%	100%	40%	46%	44%	39%	32%	70%	47%	13%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	41%	38%	44%	0%	45%	43%	29%	33%	54%	31%	43%	40%	100%	40%	33%	49%	46%	37%	55%	53%	20%
No of respondents	188	90	98	1	67	89	28	75	69	44	20	167	1	5	20	21	59	83	20	90	75

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	47%	48%	46%	100%	48%	51%	29%	42%	50%	51%	36%	49%	0%	66%	64%	64%	40%	43%	24%	46%	54%
Ensuring a reliable & continuous water supply	55%	54%	56%	100%	57%	60%	33%	53%	58%	56%	46%	57%	0%	66%	70%	77%	49%	50%	34%	56%	61%
Ensuring the safety of tap water	62%	59%	64%	100%	65%	62%	53%	62%	63%	60%	59%	62%	0%	66%	66%	74%	58%	60%	31%	63%	68%
Managing the appearance, taste & smell of tap water	60%	61%	59%	100%	62%	63%	47%	64%	57%	60%	55%	61%	0%	66%	66%	80%	60%	54%	31%	61%	67%
Managing the pressure of water in your taps & the number of unplanned interruptions	54%	57%	52%	100%	60%	57%	31%	56%	54%	51%	52%	55%	0%	66%	61%	66%	58%	46%	34%	54%	61%
Handling customers' accounts, queries, complaints & customers with special needs	50%	47%	52%	100%	53%	51%	32%	47%	48%	55%	49%	50%	0%	66%	61%	64%	47%	44%	21%	45%	63%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	56%	54%	58%	100%	63%	57%	32%	51%	58%	60%	52%	57%	0%	66%	66%	77%	49%	52%	24%	56%	63%
Avoid the risk of homes & gardens being flooded with sewerage	50%	47%	54%	100%	58%	51%	29%	44%	54%	56%	36%	52%	0%	66%	61%	68%	45%	47%	24%	47%	61%
Managing the amount of water taken from the environment to supply customers	50%	49%	50%	100%	53%	52%	31%	48%	51%	51%	33%	52%	100%	66%	64%	61%	45%	46%	21%	44%	63%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	51%	51%	52%	100%	55%	54%	29%	49%	52%	53%	36%	53%	100%	66%	61%	65%	49%	47%	24%	48%	62%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	53%	48%	57%	100%	57%	54%	34%	46%	60%	53%	36%	55%	100%	46%	61%	69%	48%	50%	27%	52%	61%
Ensuring a reliable & continuous water supply	54%	49%	59%	100%	60%	56%	31%	53%	57%	51%	49%	54%	100%	46%	59%	62%	52%	53%	34%	50%	65%
Ensuring the safety of tap water	62%	59%	64%	100%	70%	59%	47%	65%	64%	51%	66%	61%	100%	46%	56%	66%	62%	63%	34%	61%	69%
Managing the appearance, taste & smell of tap water	62%	59%	65%	100%	67%	63%	45%	67%	60%	56%	62%	62%	100%	46%	56%	78%	64%	58%	27%	62%	70%
Managing the pressure of water in your taps & the number of unplanned interruptions	55%	55%	55%	100%	60%	59%	30%	57%	56%	51%	59%	54%	100%	46%	56%	72%	62%	46%	34%	53%	64%
Handling customers' accounts, queries, complaints & customers with special needs	48%	40%	57%	100%	57%	48%	25%	46%	51%	49%	43%	49%	100%	46%	45%	59%	49%	46%	21%	43%	64%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	54%	50%	58%	100%	61%	56%	28%	53%	58%	49%	56%	54%	100%	46%	51%	65%	55%	51%	24%	53%	61%
Avoid the risk of homes & gardens being flooded with sewerage	50%	45%	54%	100%	56%	51%	27%	46%	56%	47%	43%	50%	100%	46%	51%	62%	49%	47%	24%	46%	60%
Managing the amount of water taken from the environment to supply customers	51%	46%	55%	100%	55%	52%	29%	53%	52%	44%	43%	51%	100%	46%	49%	59%	56%	46%	21%	44%	65%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	48%	43%	52%	100%	54%	49%	22%	46%	52%	44%	46%	48%	100%	46%	45%	62%	51%	42%	24%	41%	62%
No of respondents	199	98	102	1	70	95	30	79	74	46	22	176	1	5	20	22	63	89	22	97	77

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	55%	48%	62%	100%	65%	55%	32%	53%	58%	56%	43%	57%	100%	46%	67%	55%	58%	52%	27%	55%	62%
Ensuring a reliable & continuous water supply	58%	54%	63%	100%	65%	58%	43%	58%	59%	58%	49%	59%	100%	46%	70%	59%	55%	59%	34%	58%	64%
Ensuring the safety of tap water	64%	61%	67%	100%	73%	62%	51%	67%	64%	60%	66%	64%	100%	46%	61%	70%	67%	63%	34%	63%	73%
Managing the appearance, taste & smell of tap water	60%	58%	62%	100%	69%	60%	38%	62%	61%	56%	65%	59%	100%	46%	56%	78%	61%	57%	27%	61%	67%
Managing the pressure of water in your taps & the number of unplanned interruptions	57%	57%	57%	100%	63%	60%	32%	60%	58%	51%	59%	57%	100%	46%	56%	68%	63%	51%	34%	58%	62%
Handling customers' accounts, queries, complaints & customers with special needs	53%	46%	59%	100%	62%	52%	32%	53%	55%	49%	55%	52%	100%	46%	45%	65%	54%	51%	21%	51%	64%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	58%	54%	61%	100%	67%	58%	34%	57%	62%	53%	62%	57%	100%	46%	56%	76%	59%	54%	24%	61%	62%
Avoid the risk of homes & gardens being flooded with sewerage	53%	46%	59%	100%	64%	50%	31%	48%	60%	49%	53%	52%	100%	46%	51%	74%	52%	49%	24%	50%	62%
Managing the amount of water taken from the environment to supply customers	55%	51%	59%	100%	65%	53%	31%	53%	57%	56%	53%	55%	100%	66%	59%	67%	59%	48%	21%	52%	68%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	54%	52%	55%	100%	64%	52%	29%	51%	55%	56%	53%	53%	100%	66%	56%	60%	57%	49%	24%	51%	64%
No of respondents	199	98	102	1	70	95	30	79	74	46	22	176	1	5	20	22	63	89	22	97	77

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	7%
Ensuring a reliable & continuous water supply	1%
Ensuring the safety of tap water	9%
Managing the appearance, taste & smell of tap water	12%
Managing the pressure of water in your taps & the number of unplanned interruptions	7%
Handling customers' accounts, queries, complaints & customers with special needs	1%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	2%
Avoid the risk of homes & gardens being flooded with sewerage	4%
Managing the amount of water taken from the environment to supply customers	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	4%
Upgrade water pipes	1%
(further) reduce limescale in water	4%
Reduce chemical treatments in water supply	3%
maintain the correct service level	1%
No, none	64%
No of respondents	200

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	4%	5%	0%	3%	6%	6%	0%	7%	9%	8%	4%	0%	0%	14%	6%	1%	5%	8%	3%	6%
Very poor value	8%	10%	7%	0%	8%	11%	3%	7%	4%	18%	3%	9%	0%	20%	5%	3%	4%	13%	8%	14%	1%
Fairly poor value	19%	21%	17%	0%	15%	23%	16%	14%	23%	22%	30%	18%	0%	0%	14%	30%	17%	21%	20%	19%	19%
Neither poor nor good value	23%	21%	25%	100%	24%	23%	13%	27%	19%	22%	10%	24%	100%	0%	24%	16%	24%	26%	20%	16%	32%
Fairly good value	27%	25%	29%	0%	29%	23%	36%	25%	35%	16%	16%	28%	0%	20%	30%	37%	33%	19%	17%	31%	25%
Very good value	7%	10%	4%	0%	7%	7%	5%	9%	4%	7%	7%	7%	0%	46%	0%	8%	10%	3%	10%	4%	10%
Extremely good value	0%	1%	0%	0%	0%	0%	2%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	3%	0%	0%
Dont know/cant say	11%	9%	12%	0%	15%	6%	19%	16%	7%	7%	26%	9%	0%	14%	13%	0%	11%	13%	14%	13%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	1%	5%	0%	1%	4%	3%	0%	3%	9%	8%	3%	0%	0%	14%	6%	0%	2%	4%	1%	6%
Very poor value	4%	7%	2%	0%	2%	6%	5%	0%	5%	11%	0%	5%	0%	20%	5%	0%	0%	8%	18%	5%	0%
Fairly poor value	13%	15%	11%	0%	13%	15%	12%	14%	12%	14%	23%	12%	0%	20%	5%	13%	10%	17%	3%	19%	10%
Neither poor nor good value	24%	17%	30%	100%	16%	28%	23%	27%	15%	31%	7%	26%	0%	0%	25%	10%	20%	31%	28%	14%	32%
Fairly good value	34%	36%	33%	0%	44%	30%	22%	31%	43%	25%	39%	33%	100%	0%	34%	42%	49%	24%	30%	35%	34%
Very good value	11%	10%	11%	0%	8%	12%	14%	13%	12%	4%	7%	11%	0%	20%	4%	14%	12%	10%	7%	9%	14%
Extremely good value	1%	2%	0%	0%	0%	1%	5%	2%	0%	2%	0%	1%	0%	26%	0%	4%	0%	0%	0%	1%	2%
Dont know/cant say	10%	11%	9%	0%	16%	4%	16%	13%	10%	4%	16%	9%	0%	14%	13%	10%	10%	9%	10%	15%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	4%	6%	0%	1%	5%	12%	0%	5%	13%	8%	4%	0%	0%	14%	6%	0%	6%	8%	4%	6%
Very poor value	5%	6%	4%	0%	5%	6%	0%	2%	4%	11%	0%	5%	0%	20%	5%	0%	1%	8%	15%	6%	0%
Fairly poor value	11%	15%	8%	0%	7%	15%	10%	7%	13%	15%	17%	11%	0%	0%	4%	7%	7%	18%	11%	11%	11%
Neither poor nor good value	28%	23%	34%	100%	27%	30%	21%	31%	24%	31%	9%	31%	0%	20%	36%	36%	20%	31%	26%	18%	40%
Fairly good value	28%	26%	29%	0%	31%	27%	25%	27%	33%	20%	23%	28%	0%	0%	24%	34%	42%	19%	17%	35%	22%
Very good value	13%	15%	10%	0%	12%	13%	16%	18%	13%	2%	19%	11%	100%	26%	4%	14%	21%	7%	7%	12%	15%
Extremely good value	1%	1%	1%	0%	4%	0%	0%	2%	0%	2%	0%	1%	0%	20%	0%	0%	2%	0%	6%	1%	0%
Dont know/cant say	9%	10%	8%	0%	14%	4%	16%	13%	8%	4%	23%	7%	0%	14%	13%	3%	7%	11%	10%	12%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	9%	13%	6%	0%	5%	14%	6%	4%	8%	22%	12%	9%	0%	20%	19%	3%	4%	12%	22%	9%	7%
Probably not willing to pay	17%	17%	17%	0%	16%	17%	19%	22%	17%	9%	30%	16%	0%	0%	4%	16%	21%	18%	33%	19%	11%
Probably willing to pay	48%	42%	53%	100%	48%	48%	41%	46%	53%	42%	36%	49%	0%	20%	63%	54%	48%	44%	27%	50%	49%
Definitely willing to pay	12%	17%	8%	0%	10%	16%	9%	16%	9%	11%	16%	12%	0%	46%	5%	17%	19%	6%	8%	7%	20%
Dont know/Cant say	13%	11%	15%	0%	21%	5%	24%	13%	13%	16%	6%	14%	100%	14%	9%	10%	7%	20%	10%	15%	13%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	20%	29%	8%	0%	13%	27%	10%	23%	19%	17%	17%	21%	0%	0%	0%	17%	28%	19%	29%	20%	9%
Cost too much for improvements	56%	46%	70%	0%	75%	50%	34%	54%	62%	50%	45%	58%	0%	100%	43%	67%	54%	55%	57%	49%	69%
Cant afford it	19%	17%	22%	0%	11%	13%	56%	23%	9%	25%	38%	15%	0%	0%	29%	0%	18%	22%	14%	20%	22%
Dont know/Cant say	5%	9%	0%	0%	0%	10%	0%	0%	9%	8%	0%	6%	0%	0%	28%	16%	0%	3%	0%	11%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	47	27	19	0	13	25	7	19	16	12	8	38	0	1	4	4	15	22	12	23	11

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	8%	9%	7%	0%	5%	10%	11%	0%	10%	20%	12%	8%	0%	20%	14%	6%	0%	13%	26%	5%	8%
Probably not willing to pay	14%	11%	17%	0%	14%	15%	14%	20%	9%	11%	23%	13%	0%	20%	9%	18%	9%	17%	22%	16%	9%
Probably willing to pay	57%	53%	61%	100%	60%	54%	56%	55%	65%	49%	49%	58%	100%	20%	53%	55%	67%	54%	46%	60%	58%
Definitely willing to pay	10%	13%	6%	0%	7%	13%	7%	9%	8%	13%	7%	10%	0%	26%	15%	14%	8%	7%	0%	6%	18%
Dont know/Cant say	11%	14%	8%	0%	15%	8%	13%	16%	8%	7%	10%	11%	0%	14%	9%	7%	15%	10%	6%	14%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	35%	38%	32%	0%	66%	30%	0%	45%	27%	34%	29%	36%	0%	50%	22%	51%	51%	28%	10%	42%	46%
Cost too much for improvements	37%	22%	51%	0%	22%	46%	38%	33%	37%	42%	20%	41%	0%	50%	39%	17%	25%	43%	67%	34%	17%
Cant afford it	24%	32%	17%	0%	12%	21%	52%	22%	26%	25%	51%	18%	0%	0%	39%	17%	24%	25%	17%	19%	38%
Dont know/Cant say	4%	8%	0%	0%	0%	3%	10%	0%	10%	0%	0%	5%	0%	0%	0%	16%	0%	3%	7%	4%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	39	19	21	0	12	20	7	13	14	12	8	32	0	2	5	5	6	22	11	16	12

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	11%	13%	10%	0%	7%	14%	14%	4%	9%	29%	12%	11%	0%	20%	19%	3%	2%	18%	26%	12%	7%
Probably not willing to pay	9%	9%	9%	0%	5%	13%	9%	11%	10%	4%	17%	8%	0%	20%	4%	10%	7%	11%	17%	9%	7%
Probably willing to pay	56%	53%	59%	100%	66%	52%	41%	57%	59%	51%	46%	58%	0%	0%	59%	54%	67%	52%	51%	56%	57%
Definitely willing to pay	13%	13%	13%	0%	10%	15%	14%	16%	12%	9%	13%	13%	100%	46%	9%	20%	14%	9%	0%	12%	19%
Dont know/Cant say	10%	12%	9%	0%	11%	6%	22%	13%	10%	7%	12%	10%	0%	14%	9%	13%	9%	10%	6%	12%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	199	98	101	1	69	96	30	79	74	46	22	176	1	5	20	23	62	89	22	97	77

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	26%	32%	19%	0%	41%	25%	12%	40%	22%	22%	35%	24%	0%	50%	0%	26%	51%	25%	8%	29%	39%
Cost too much for improvements	50%	47%	54%	0%	59%	48%	49%	60%	45%	50%	24%	56%	0%	50%	61%	25%	49%	51%	74%	57%	12%
Cant afford it	22%	18%	27%	0%	0%	24%	40%	0%	28%	29%	41%	18%	0%	0%	39%	25%	0%	24%	18%	10%	49%
Dont know/Cant say	2%	4%	0%	0%	0%	3%	0%	0%	5%	0%	0%	2%	0%	0%	0%	24%	0%	0%	0%	4%	0%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	35	18	17	0	7	22	6	7	14	14	6	29	0	2	5	3	3	22	10	17	9

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	17%	15%	18%	0%	20%	15%	15%	15%	18%	18%	38%	14%	100%	14%	27%	7%	17%	17%	44%	11%	17%
Not very concerned	36%	33%	38%	100%	42%	32%	27%	29%	34%	49%	27%	37%	0%	20%	43%	30%	26%	43%	31%	23%	52%
Fairly concerned	25%	24%	26%	0%	23%	27%	26%	31%	27%	13%	19%	26%	0%	20%	9%	47%	34%	18%	13%	36%	15%
Very concerned	7%	7%	6%	0%	4%	8%	11%	5%	7%	9%	3%	7%	0%	46%	5%	13%	4%	6%	3%	8%	7%
Dont know/cant say	16%	20%	11%	0%	12%	18%	21%	20%	14%	11%	13%	16%	0%	0%	16%	3%	20%	17%	8%	23%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	5%	4%	5%	0%	6%	6%	0%	7%	4%	2%	6%	5%	0%	20%	0%	16%	5%	2%	3%	7%	3%
Ensuring a reliable & continuous water supply	4%	6%	2%	0%	2%	5%	5%	4%	6%	0%	6%	3%	0%	0%	0%	3%	7%	3%	3%	5%	2%
Ensuring the safety of tap water	9%	9%	9%	0%	14%	8%	5%	16%	6%	2%	0%	11%	0%	0%	5%	3%	16%	7%	7%	14%	5%
Managing the appearance, taste & smell of tap water	6%	6%	5%	0%	5%	6%	6%	6%	8%	2%	0%	6%	0%	0%	0%	10%	6%	6%	3%	8%	2%
Managing the pressure of water in your taps & the number of unplanned interruptions	2%	2%	1%	0%	2%	2%	0%	4%	1%	0%	0%	2%	0%	0%	0%	3%	2%	2%	6%	2%	0%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	4%	6%	2%	0%	3%	6%	0%	4%	7%	0%	6%	4%	0%	0%	0%	19%	4%	2%	3%	7%	0%
Avoid the risk of homes & gardens being flooded with sewerage	3%	3%	2%	0%	2%	3%	2%	2%	4%	2%	3%	3%	0%	0%	0%	4%	4%	3%	3%	5%	0%
Managing the amount of water taken from the environment to supply customers	1%	0%	1%	0%	2%	0%	0%	2%	0%	0%	0%	1%	0%	0%	0%	0%	0%	2%	0%	2%	0%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	1%	2%	1%	0%	0%	2%	5%	2%	2%	0%	0%	2%	0%	0%	0%	0%	1%	2%	0%	3%	0%
No of respondents	200	98	102	1	70	96	30	79	75	46	22	177	1	5	20	23	63	89	22	97	77

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	13%	12%	13%	0%	17%	9%	13%	13%	12%	14%	31%	10%	0%	0%	19%	16%	11%	12%	7%	12%	16%
Bills show one big change in first year	20%	20%	20%	0%	19%	20%	25%	18%	18%	26%	7%	22%	0%	40%	20%	25%	19%	18%	0%	27%	18%
Bills change steadily every year	67%	68%	67%	100%	64%	71%	62%	69%	70%	60%	62%	68%	100%	60%	61%	59%	70%	70%	93%	61%	66%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	193	94	99	1	69	92	27	79	70	44	21	171	1	3	20	22	62	85	22	92	76

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£31)	Maintain current service (£11)	Maintain current service (£12)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£12)	Maintain current service (£8)	Maintain current service (£7)
	3. Ensuring the safety of tap water	Meet current and future standards at 11 of treatment works. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£1)	Meet current and future standards at 5 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required, 25,000 of water company lead pipes replaced to meet new lead standard (£2)	Meet current and future standards at 5 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required, 123,000 of water company lead pipes replaced to meet new lead standard (£3)
	4. Managing the appearance, taste and smell of tap water	Ensure no increase in the number of customer complaints about the appearance, taste or smell of tap water (£0)	No increase in customer complaints about the appearance, taste or smell of tap water (£0)	No increase in customer complaints about the appearance, taste or smell of tap water (£2)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£8)	Maintain current service (£7)	Maintain current service (£7)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 3,691 to 1,030. Reduce the number of properties externally flooding from sewers by 1,478. Reduce the number of properties flooded from blocked sewers (£7)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£4)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£5)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (Less than £1)	2 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)	49 Km of rivers can better support fish and rare wildlife, 3 wetlands and lakes are restored and protected to support rare wildlife (£1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	130 Km of rivers can better support fish, 50 Km of rivers can support rare wildlife (£2)	164 Km of rivers can better support fish, 62 Km of rivers and 0 Km2 of coastal waters can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife. (£4)	439 Km of rivers can better support fish, 62 Km of rivers and 0 Km2 of coastal waters can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife. (£7)
		Overall cost on average bill taking account of cost savings by 2010 is £41 (excluding inflation)Overall bill by 2010 is £247 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £19 (plus inflation). Overall bill by 2010 is £224 (plus inflation)	Overall cost on average bill by 2010 is £24 (excluding inflation). Overall bill by 2010 is £230 (plus inflation)

United Utilities Water PLC

1. Key Findings

United Utilities is a water and sewerage company serving 6.8 million customers with water and 6.9 million customers with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £172
Reference Plan A - £148
Reference Plan B - £204

☐ 74% of customers stated that they were satisfied with the service provided by United Utilities, with 12% saying that they were dissatisfied. 56% of customers regarded the services as good value for money, and 17% thought it poor value for money.

☐ The maintenance of current levels of service was regarded important by 80 to 96% or more customers. This dropped to 80% for 'handling customer accounts, queries, complaints and customers with special needs'. There was a similar trend in customer assessments of the importance of introducing improvements by 2010. Between 79% and 87% regarded improvements to all service elements important in this time frame, with marginally fewer (72%) stating the same for 'handling customer accounts, queries, complaints and customers with special needs'.

☐ Customers did not appear to have a significant preference for the set of proposals within any one of the three plans (each of which proposed a combination of maintained and improved services). Across the three plans, customer approval was greatest for the proposed outputs for 'ensuring the safety of tap water' (68% to 71%) followed by 'managing the appearance, taste and smell of tap water' (61%-66%) and 'ensuring a reliable and continuous water supply' (63%-65%). 'Handling customers accounts, queries, complaints and customers with special needs' was ranked as the lowest priority within each plan, with customer support ranging from 48% for Reference Plan B, 50% for the Company Preferred Plan and 52% for Reference Plan A.

☐ 51% of customers did not wish to see any improvements in addition to those proposed in the plans. Where customers did express a view for further improvement, a significant proportion opted for 'ensuring the safety of tap water' (25%) and 'managing the appearance, taste and smell of tap water' (22%).

☐ 34% and 38% of customers thought the Company Preferred Plan and Reference Plan A respectively to be good value for money. Only 29% thought Reference Plan B was good value for money. A significant proportion (47%) thought Reference Plan B to be poor value for money, and 38% and 36% of customers thought the Company Preferred Plan and Reference Plan A respectively to be poor value for money.

☐ The proportion of customers indicating that they were 'willing to pay' ranged from 42% for the Reference Plan B (31% probably willing, 11% definitely willing), 50% for the Company Preferred Plan (40% probably willing, 10% definitely willing) to 52% for Reference Plan A (40% probably willing, 12% definitely willing). The proportion of customers indicating that they were 'not willing to pay' ranged between 37% for the Company Preferred Plan (20% probably not willing, 17% definitely not willing) and Reference Plan A (21% probably not willing, 16% definitely not willing) to 48% for Reference Plan B (23% probably not willing, 25% definitely not willing).

☐ Of those customers who indicated they were definitely or probably not willing to pay, 50% said that this was because the 'cost was too much for the improvements' in the Company Preferred Plan; 44% said they can't afford Reference Plan A. 45% said the cost was too much for the improvements in Reference Plan B and 44% said they couldn't afford the improvements in Reference Plan B. Between 15% and 22% of all United Utilities Water customers indicated that they could not afford the bill increases set out in the proposed company plans (15% for the Company Preferred Plan, 17% for Reference Plan A and 22% for Reference Plan B).

☐ 52% of customers indicated that they were not concerned if some improvements were delayed until after 2010, and 32% said that they would be concerned. Greatest concern (15%) was expressed for a delay in improvements to the 'safety of tap water'. 0% of customers were concerned about delays in improvements to 'maintaining water pressure in the taps and the number of unplanned interruptions to supplies'.

☐ 79% of United Utilities Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three improvements customers most wanted to see were 'ensuring the safety of tap water' (at a cost of £17-£18/annum), 'managing the appearance, taste and smell of tap water' (£3-£4/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£53-£70/annum).

United Utilities Water PLC

2. Introduction

The attitudes and preferences of United Utilities Water customers, reported in section 3, are based on a sample of 411 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty years
	3. Ensuring the safety of tap water	99.81% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 42,857 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	850 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	936 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	26 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	82% of rivers are of good, 9% fair and 9% poor quality.97% of designated bathing waters meet minimum standards and 5% meet higher standards.40% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £234 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	2%	1%	0%	0%	2%	2%	1%	2%	1%	1%	1%	0%	2%	1%	0%	0%	2%	2%	2%	0%
Very dissatisfied	4%	2%	5%	0%	3%	5%	3%	4%	2%	6%	2%	4%	0%	5%	0%	0%	2%	6%	2%	6%	0%
Fairly dissatisfied	7%	5%	8%	0%	5%	9%	6%	8%	4%	9%	4%	7%	0%	7%	4%	3%	4%	10%	6%	9%	1%
Neither satisfied nor dissatisfied	12%	14%	11%	37%	17%	7%	10%	11%	13%	13%	18%	11%	0%	18%	14%	12%	10%	12%	10%	9%	24%
Fairly satisfied	34%	34%	35%	27%	35%	36%	32%	32%	36%	34%	37%	34%	0%	36%	35%	39%	35%	32%	35%	33%	37%
Very satisfied	32%	33%	32%	25%	30%	30%	41%	33%	36%	28%	25%	34%	0%	21%	34%	33%	41%	30%	35%	32%	30%
Extremely satisfied	8%	8%	8%	11%	6%	11%	5%	10%	6%	8%	9%	8%	0%	9%	9%	10%	6%	7%	10%	8%	7%
Dont know/cant say	2%	3%	1%	0%	2%	1%	2%	1%	1%	2%	4%	1%	0%	2%	3%	3%	2%	0%	1%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	2%	1%	0%	0%	2%	3%	1%	2%	2%	1%	2%	0%	5%	1%	0%	1%	1%	2%	2%	0%
Very poor value	5%	4%	6%	0%	3%	8%	6%	1%	6%	8%	5%	5%	0%	8%	2%	3%	0%	8%	1%	8%	1%
Fairly poor value	10%	13%	7%	0%	8%	11%	8%	12%	7%	10%	3%	11%	0%	7%	6%	12%	10%	11%	7%	12%	7%
Neither poor nor good value	25%	27%	23%	37%	31%	18%	23%	21%	24%	30%	29%	24%	0%	31%	22%	19%	19%	28%	17%	23%	40%
Fairly good value	35%	33%	37%	15%	37%	35%	33%	34%	36%	34%	42%	34%	0%	31%	36%	46%	41%	30%	38%	34%	36%
Very good value	18%	15%	20%	25%	15%	19%	23%	21%	19%	14%	16%	18%	0%	13%	27%	18%	21%	15%	27%	15%	12%
Extremely good value	3%	3%	3%	11%	3%	3%	2%	4%	3%	2%	2%	3%	0%	4%	3%	0%	6%	1%	5%	2%	1%
Dont know/cant say	3%	3%	3%	12%	3%	3%	2%	4%	3%	1%	3%	3%	0%	1%	3%	2%	2%	4%	3%	3%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO <u>MAINTAIN</u> CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	94%	96%	93%	100%	95%	96%	89%	96%	91%	96%	95%	94%	0%	99%	91%	98%	93%	93%	94%	94%	95%
Ensuring a reliable & continuous water supply	95%	95%	95%	100%	94%	96%	96%	99%	92%	95%	95%	95%	0%	96%	87%	97%	95%	96%	94%	95%	96%
Ensuring the safety of tap water	96%	96%	96%	88%	95%	97%	96%	96%	95%	97%	96%	96%	0%	100%	97%	98%	92%	96%	94%	97%	97%
Managing the appearance, taste & smell of tap water	94%	92%	96%	90%	92%	97%	90%	96%	92%	93%	92%	94%	0%	96%	88%	96%	96%	93%	95%	94%	92%
Managing the pressure of water in your taps & the number of unplanned interruptions	92%	92%	91%	90%	92%	91%	93%	94%	90%	91%	92%	91%	0%	89%	84%	91%	92%	94%	90%	91%	94%
Handling customers' accounts, queries, complaints & customers with special needs	80%	81%	80%	100%	75%	84%	84%	86%	75%	81%	79%	81%	0%	82%	81%	79%	79%	81%	82%	80%	82%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	92%	92%	92%	100%	90%	96%	89%	96%	88%	94%	97%	91%	0%	96%	93%	96%	91%	91%	91%	92%	94%
Avoid the risk of homes & gardens being flooded with sewerage	93%	90%	96%	100%	91%	95%	92%	99%	87%	94%	97%	92%	0%	96%	92%	93%	92%	92%	95%	92%	91%
Managing the amount of water taken from the environment to supply customers	86%	85%	87%	100%	81%	89%	89%	90%	82%	87%	88%	86%	0%	81%	84%	89%	79%	91%	85%	84%	92%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	89%	87%	90%	100%	88%	89%	88%	93%	86%	88%	93%	88%	0%	80%	89%	87%	90%	91%	92%	87%	92%
No of respondents	408	200	208	8	174	147	75	122	153	133	70	338	0	53	47	44	88	175	105	222	78

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	81%	79%	83%	76%	78%	85%	81%	82%	74%	88%	78%	82%	0%	94%	81%	79%	77%	79%	71%	86%	82%
Ensuring a reliable & continuous water supply	86%	85%	87%	88%	83%	89%	88%	87%	82%	90%	79%	88%	0%	94%	81%	89%	83%	86%	75%	91%	87%
Ensuring the safety of tap water	87%	83%	90%	76%	83%	91%	89%	86%	84%	90%	80%	88%	0%	94%	83%	87%	84%	86%	79%	91%	83%
Managing the appearance, taste & smell of tap water	87%	84%	89%	88%	79%	94%	89%	89%	84%	87%	81%	88%	0%	93%	85%	83%	91%	84%	88%	91%	75%
Managing the pressure of water in your taps & the number of unplanned interruptions	83%	82%	83%	76%	80%	84%	88%	86%	80%	82%	81%	83%	0%	84%	75%	83%	83%	84%	74%	87%	86%
Handling customers' accounts, queries, complaints & customers with special needs	72%	69%	74%	88%	67%	75%	77%	74%	67%	75%	70%	72%	0%	75%	59%	66%	71%	76%	63%	73%	80%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	84%	80%	88%	88%	81%	87%	87%	88%	77%	89%	81%	85%	0%	96%	78%	85%	84%	81%	76%	90%	79%
Avoid the risk of homes & gardens being flooded with sewerage	84%	81%	86%	88%	81%	86%	85%	88%	77%	88%	79%	85%	0%	94%	83%	89%	82%	81%	77%	89%	80%
Managing the amount of water taken from the environment to supply customers	79%	75%	83%	88%	75%	84%	80%	80%	78%	80%	78%	80%	0%	75%	74%	84%	76%	82%	72%	82%	81%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	80%	75%	84%	88%	77%	84%	78%	80%	79%	80%	79%	80%	0%	75%	75%	77%	82%	81%	72%	83%	81%
No of respondents	403	199	205	8	173	145	73	122	152	129	70	333	0	50	46	44	88	175	105	217	78

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	56%	57%	56%	50%	54%	61%	54%	67%	53%	51%	64%	55%	0%	41%	56%	73%	62%	54%	60%	49%	73%
Ensuring a reliable & continuous water supply	63%	65%	61%	50%	62%	67%	59%	75%	64%	51%	69%	62%	0%	41%	54%	69%	74%	65%	68%	56%	78%
Ensuring the safety of tap water	69%	70%	68%	50%	68%	74%	65%	77%	72%	58%	72%	68%	0%	50%	69%	69%	80%	69%	77%	62%	78%
Managing the appearance, taste & smell of tap water	61%	60%	61%	50%	59%	65%	57%	64%	62%	56%	66%	59%	0%	49%	57%	67%	64%	62%	69%	54%	70%
Managing the pressure of water in your taps & the number of unplanned interruptions	58%	58%	57%	50%	59%	60%	50%	67%	56%	50%	63%	56%	0%	46%	46%	65%	67%	58%	61%	50%	73%
Handling customers' accounts, queries, complaints & customers with special needs	51%	50%	51%	50%	51%	52%	45%	58%	49%	46%	59%	49%	0%	41%	44%	59%	64%	46%	57%	45%	57%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	56%	57%	55%	50%	54%	58%	57%	65%	53%	51%	63%	54%	0%	41%	56%	70%	59%	55%	59%	50%	68%
Avoid the risk of homes & gardens being flooded with sewerage	55%	55%	55%	50%	50%	59%	56%	65%	52%	49%	63%	53%	0%	46%	52%	65%	64%	51%	55%	51%	66%
Managing the amount of water taken from the environment to supply customers	51%	53%	50%	50%	50%	55%	47%	57%	51%	46%	63%	49%	0%	44%	48%	66%	59%	46%	50%	48%	62%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	50%	51%	49%	61%	48%	55%	46%	56%	50%	45%	62%	48%	0%	38%	45%	58%	59%	48%	53%	44%	61%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	58%	58%	58%	47%	57%	60%	57%	68%	59%	48%	71%	55%	0%	36%	54%	70%	61%	61%	62%	50%	76%
Ensuring a reliable & continuous water supply	65%	66%	64%	47%	62%	69%	65%	78%	66%	53%	79%	62%	0%	37%	64%	68%	73%	69%	74%	56%	81%
Ensuring the safety of tap water	71%	72%	71%	62%	70%	73%	75%	83%	75%	57%	81%	69%	0%	48%	70%	76%	82%	72%	78%	64%	84%
Managing the appearance, taste & smell of tap water	66%	68%	64%	47%	64%	67%	71%	75%	67%	58%	80%	63%	0%	44%	64%	68%	74%	69%	76%	60%	72%
Managing the pressure of water in your taps & the number of unplanned interruptions	59%	58%	59%	47%	59%	62%	52%	70%	58%	49%	69%	57%	0%	37%	49%	64%	66%	63%	60%	54%	73%
Handling customers' accounts, queries, complaints & customers with special needs	54%	54%	55%	47%	56%	55%	49%	62%	54%	48%	68%	52%	0%	37%	48%	66%	62%	55%	54%	51%	67%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	57%	55%	58%	47%	55%	61%	56%	66%	57%	48%	66%	55%	0%	36%	55%	70%	61%	58%	58%	51%	70%
Avoid the risk of homes & gardens being flooded with sewerage	58%	58%	58%	57%	54%	62%	59%	69%	58%	49%	69%	56%	0%	40%	59%	72%	66%	57%	59%	54%	72%
Managing the amount of water taken from the environment to supply customers	54%	53%	54%	47%	53%	56%	50%	59%	56%	47%	70%	51%	0%	41%	53%	63%	58%	53%	50%	51%	67%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	52%	52%	53%	47%	53%	55%	49%	59%	54%	44%	67%	49%	0%	34%	50%	61%	60%	52%	53%	47%	67%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	57%	57%	56%	62%	55%	61%	52%	70%	52%	50%	68%	54%	0%	35%	58%	62%	64%	58%	61%	48%	75%
Ensuring a reliable & continuous water supply	65%	66%	63%	62%	63%	68%	61%	78%	64%	53%	71%	63%	0%	42%	59%	66%	76%	66%	73%	56%	76%
Ensuring the safety of tap water	68%	71%	65%	85%	67%	69%	69%	76%	71%	57%	71%	68%	0%	45%	61%	68%	77%	73%	78%	59%	81%
Managing the appearance, taste & smell of tap water	63%	65%	62%	74%	62%	65%	62%	72%	63%	56%	69%	62%	0%	48%	55%	64%	72%	66%	77%	56%	67%
Managing the pressure of water in your taps & the number of unplanned interruptions	56%	56%	56%	62%	56%	60%	47%	67%	51%	52%	65%	54%	0%	43%	49%	59%	65%	56%	57%	51%	70%
Handling customers' accounts, queries, complaints & customers with special needs	52%	51%	53%	62%	52%	55%	46%	59%	50%	49%	61%	50%	0%	40%	48%	59%	63%	50%	53%	48%	64%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	53%	50%	55%	62%	48%	59%	52%	60%	50%	49%	62%	51%	0%	35%	51%	64%	58%	53%	57%	46%	64%
Avoid the risk of homes & gardens being flooded with sewerage	55%	54%	56%	73%	52%	59%	51%	67%	51%	48%	62%	53%	0%	38%	56%	57%	67%	53%	58%	49%	66%
Managing the amount of water taken from the environment to supply customers	51%	50%	52%	62%	51%	52%	46%	58%	51%	46%	65%	48%	0%	37%	54%	56%	58%	50%	50%	47%	65%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	48%	46%	51%	62%	46%	53%	46%	56%	45%	46%	66%	45%	0%	33%	49%	53%	59%	46%	51%	42%	62%
No of respondents	410	202	208	8	174	150	76	122	154	135	70	340	0	53	46	45	88	178	105	223	78

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Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	6%
Ensuring a reliable & continuous water supply	10%
Ensuring the safety of tap water	25%
Managing the appearance, taste & smell of tap water	22%
Managing the pressure of water in your taps & the number of unplanned interruptions	9%
Handling customers' accounts, queries, complaints & customers with special needs	8%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	9%
Avoid the risk of homes & gardens being flooded with sewerage	6%
Managing the amount of water taken from the environment to supply customers	5%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	8%
Upgrade water pipes	2%
(further) reduce sewerage drainage problems	1%
Reduce chemical treatments in water supply	2%
maintain the correct service level	1%
Improve communication of water shutdown	1%
More water conservation education	1%
No, none	51%
No of respondents	411

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	9%	7%	11%	15%	7%	10%	12%	8%	7%	12%	12%	8%	0%	15%	7%	2%	4%	12%	1%	15%	2%
Very poor value	13%	12%	15%	0%	13%	14%	13%	7%	15%	18%	16%	13%	0%	25%	15%	7%	12%	12%	11%	18%	4%
Fairly poor value	16%	16%	17%	0%	21%	14%	13%	16%	15%	19%	19%	16%	0%	11%	20%	27%	13%	16%	11%	22%	7%
Neither poor nor good value	21%	21%	22%	37%	23%	21%	18%	14%	28%	21%	14%	23%	0%	24%	24%	25%	15%	22%	23%	17%	32%
Fairly good value	21%	23%	20%	26%	21%	20%	26%	26%	23%	14%	20%	21%	0%	14%	18%	22%	25%	22%	25%	15%	33%
Very good value	10%	12%	9%	9%	9%	11%	12%	19%	7%	5%	9%	10%	0%	1%	10%	8%	23%	7%	15%	9%	8%
Extremely good value	3%	2%	3%	0%	3%	3%	2%	6%	1%	2%	7%	2%	0%	1%	0%	7%	6%	1%	9%	1%	2%
Dont know/cant say	5%	8%	3%	12%	4%	7%	5%	4%	3%	9%	3%	6%	0%	8%	7%	2%	2%	7%	4%	4%	12%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	7%	6%	8%	15%	4%	8%	11%	4%	5%	11%	5%	7%	0%	18%	0%	6%	2%	8%	3%	11%	0%
Very poor value	15%	13%	17%	0%	13%	16%	16%	9%	15%	20%	15%	15%	0%	18%	21%	14%	7%	16%	11%	20%	6%
Fairly poor value	14%	14%	15%	10%	16%	14%	12%	19%	13%	12%	23%	12%	0%	8%	18%	13%	19%	13%	15%	17%	6%
Neither poor nor good value	23%	23%	23%	27%	24%	22%	23%	12%	26%	29%	13%	25%	0%	34%	20%	27%	16%	23%	22%	20%	33%
Fairly good value	26%	26%	26%	38%	29%	22%	24%	28%	30%	19%	23%	26%	0%	13%	34%	30%	24%	27%	22%	21%	45%
Very good value	9%	12%	6%	9%	9%	10%	9%	17%	8%	4%	13%	8%	0%	3%	5%	6%	21%	7%	17%	7%	6%
Extremely good value	3%	2%	4%	0%	2%	4%	4%	7%	2%	1%	6%	2%	0%	3%	1%	0%	9%	1%	8%	2%	0%
Dont know/cant say	3%	4%	2%	0%	4%	4%	1%	4%	1%	4%	1%	4%	0%	4%	0%	4%	2%	4%	3%	3%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	410	200	210	8	174	150	75	120	154	136	70	340	0	53	47	44	88	178	105	223	78

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	16%	14%	18%	15%	14%	18%	15%	15%	14%	19%	21%	15%	0%	24%	11%	18%	14%	16%	4%	26%	4%
Very poor value	14%	14%	14%	0%	15%	14%	11%	11%	14%	17%	15%	14%	0%	22%	25%	16%	8%	12%	10%	17%	9%
Fairly poor value	17%	15%	18%	0%	15%	18%	18%	13%	19%	17%	16%	17%	0%	17%	17%	17%	13%	18%	16%	17%	17%
Neither poor nor good value	19%	20%	18%	37%	20%	18%	20%	17%	21%	20%	16%	20%	0%	21%	17%	16%	20%	20%	27%	14%	26%
Fairly good value	22%	25%	20%	38%	25%	20%	22%	28%	24%	15%	16%	24%	0%	6%	23%	20%	27%	25%	19%	21%	31%
Very good value	6%	7%	6%	9%	4%	7%	11%	10%	4%	6%	7%	6%	0%	5%	2%	9%	11%	5%	15%	2%	9%
Extremely good value	1%	0%	2%	0%	1%	2%	1%	3%	1%	0%	4%	1%	0%	1%	1%	0%	4%	0%	4%	0%	0%
Dont know/cant say	4%	3%	5%	0%	6%	3%	2%	4%	3%	4%	4%	3%	0%	4%	4%	4%	3%	4%	5%	3%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

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3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	17%	15%	20%	15%	18%	15%	22%	6%	18%	26%	18%	17%	0%	36%	18%	12%	8%	18%	9%	25%	6%
Probably not willing to pay	20%	23%	17%	12%	18%	21%	20%	21%	23%	16%	26%	19%	0%	11%	26%	19%	23%	20%	20%	22%	14%
Probably willing to pay	40%	39%	42%	48%	45%	41%	29%	45%	43%	32%	36%	41%	0%	22%	40%	53%	49%	38%	45%	33%	55%
Definitely willing to pay	10%	11%	10%	25%	9%	9%	17%	18%	6%	8%	15%	10%	0%	9%	8%	8%	17%	9%	14%	7%	15%
Dont know/Cant say	12%	13%	11%	0%	10%	14%	13%	9%	10%	17%	4%	14%	0%	23%	9%	8%	3%	15%	12%	13%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	8%	9%	7%	0%	3%	12%	12%	14%	6%	7%	19%	5%	0%	8%	0%	14%	6%	10%	5%	10%	0%
Cost too much for improvements	50%	54%	46%	44%	50%	63%	23%	78%	53%	31%	57%	48%	0%	12%	25%	52%	79%	59%	51%	48%	56%
Cant afford it	38%	33%	43%	56%	44%	22%	57%	4%	35%	62%	17%	43%	0%	80%	71%	30%	5%	28%	36%	38%	44%
Too much & cant afford it	1%	0%	1%	0%	1%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	0%	3%	0%	0%	1%	0%
Dont know/Cant say	3%	4%	2%	0%	1%	3%	8%	4%	6%	0%	4%	3%	0%	0%	4%	4%	7%	2%	9%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	154	76	78	2	62	54	32	34	63	57	31	122	0	25	20	14	28	67	31	106	15

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	16%	16%	16%	15%	15%	15%	21%	7%	16%	25%	11%	17%	0%	39%	13%	15%	6%	16%	11%	24%	3%
Probably not willing to pay	21%	20%	21%	0%	19%	23%	19%	25%	21%	16%	30%	18%	0%	9%	23%	14%	22%	24%	25%	22%	11%
Probably willing to pay	40%	41%	39%	48%	42%	39%	39%	42%	44%	34%	38%	40%	0%	22%	51%	46%	47%	38%	42%	33%	58%
Definitely willing to pay	12%	13%	12%	25%	13%	12%	10%	21%	9%	9%	18%	11%	0%	10%	4%	15%	20%	10%	15%	8%	19%
Dont know/Cant say	11%	11%	12%	12%	12%	11%	10%	7%	10%	17%	4%	13%	0%	21%	9%	10%	5%	12%	8%	13%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	12%	13%	11%	0%	1%	18%	21%	25%	10%	5%	20%	10%	0%	8%	0%	11%	21%	13%	16%	12%	0%
Cost too much for improvements	39%	44%	35%	0%	43%	46%	19%	62%	47%	16%	53%	36%	0%	0%	20%	49%	67%	46%	44%	38%	28%
Cant afford it	44%	40%	49%	100%	53%	30%	54%	7%	36%	79%	16%	51%	0%	92%	75%	36%	6%	36%	29%	48%	72%
Too much & cant afford it	1%	0%	1%	0%	1%	0%	0%	0%	1%	0%	3%	0%	0%	0%	0%	0%	3%	0%	0%	1%	0%
Dont know/Cant say	4%	4%	4%	0%	1%	6%	6%	7%	6%	0%	9%	3%	0%	0%	5%	5%	3%	6%	10%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	149	72	77	1	57	57	31	38	57	54	29	120	0	25	16	13	25	70	37	100	10

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	25%	27%	23%	27%	25%	25%	24%	16%	27%	31%	24%	25%	0%	44%	24%	26%	17%	23%	11%	36%	12%
Probably not willing to pay	23%	21%	25%	0%	20%	28%	24%	26%	25%	19%	33%	21%	0%	14%	22%	24%	21%	27%	28%	23%	20%
Probably willing to pay	31%	33%	29%	48%	32%	27%	36%	33%	33%	27%	21%	33%	0%	16%	38%	24%	35%	34%	37%	24%	43%
Definitely willing to pay	11%	11%	10%	25%	10%	10%	10%	17%	8%	8%	17%	9%	0%	7%	9%	18%	19%	6%	14%	7%	16%
Dont know/Cant say	10%	8%	12%	0%	13%	10%	6%	9%	7%	15%	5%	11%	0%	19%	6%	7%	8%	11%	10%	11%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	7%	8%	5%	0%	2%	12%	6%	13%	4%	5%	14%	5%	0%	0%	5%	6%	10%	8%	3%	9%	0%
Cost too much for improvements	45%	48%	43%	0%	51%	48%	26%	73%	52%	17%	62%	41%	0%	8%	23%	68%	74%	48%	49%	43%	52%
Cant afford it	44%	40%	48%	100%	44%	36%	61%	14%	34%	78%	21%	50%	0%	92%	68%	21%	9%	40%	41%	44%	48%
Too much & cant afford it	1%	0%	2%	0%	1%	1%	0%	0%	2%	0%	2%	1%	0%	0%	0%	0%	5%	0%	0%	1%	0%
Dont know/Cant say	3%	4%	2%	0%	2%	3%	7%	0%	8%	0%	2%	4%	0%	0%	4%	6%	2%	4%	7%	3%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	101	2	77	78	36	50	78	68	40	156	0	31	22	22	34	88	41	130	25

United Utilities Water PLC

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	25%	23%	27%	69%	25%	21%	27%	17%	27%	31%	31%	24%	0%	37%	35%	25%	21%	21%	22%	23%	35%
Not very concerned	27%	29%	25%	0%	35%	21%	27%	32%	26%	23%	30%	26%	0%	27%	23%	28%	33%	25%	24%	25%	38%
Fairly concerned	20%	21%	20%	0%	21%	21%	20%	26%	21%	15%	25%	19%	0%	8%	21%	30%	22%	21%	22%	23%	11%
Very concerned	12%	12%	12%	15%	8%	17%	12%	16%	12%	9%	11%	12%	0%	7%	9%	7%	18%	13%	14%	15%	2%
Dont know/cant say	16%	15%	16%	15%	11%	20%	15%	10%	14%	23%	3%	18%	0%	21%	13%	9%	7%	21%	18%	15%	13%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	3%	3%	3%	0%	2%	7%	2%	5%	3%	2%	5%	3%	0%	0%	3%	4%	1%	6%	3%	5%	0%
Ensuring a reliable & continuous water supply	4%	3%	5%	0%	2%	8%	2%	10%	1%	2%	5%	4%	0%	0%	9%	0%	6%	4%	3%	6%	0%
Ensuring the safety of tap water	15%	15%	16%	0%	15%	17%	15%	21%	16%	10%	12%	16%	0%	4%	15%	11%	18%	19%	11%	20%	8%
Managing the appearance, taste & smell of tap water	5%	5%	6%	0%	3%	6%	10%	10%	3%	4%	4%	6%	0%	2%	4%	9%	6%	6%	5%	6%	4%
Managing the pressure of water in your taps & the number of unplanned interruptions	0%	0%	1%	0%	0%	0%	2%	1%	1%	0%	0%	1%	0%	0%	3%	0%	1%	0%	1%	1%	0%
Handling customers' accounts, queries, complaints & customers with special needs	1%	0%	1%	0%	0%	1%	1%	0%	0%	2%	0%	1%	0%	0%	0%	0%	0%	1%	0%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	6%	7%	5%	0%	3%	12%	2%	11%	7%	2%	6%	6%	0%	1%	5%	14%	4%	7%	5%	9%	0%
Avoid the risk of homes & gardens being flooded with sewerage	1%	2%	1%	0%	1%	3%	1%	1%	1%	1%	2%	1%	0%	2%	2%	0%	2%	1%	0%	3%	0%
Managing the amount of water taken from the environment to supply customers	2%	2%	2%	0%	2%	2%	0%	6%	0%	0%	5%	1%	0%	0%	0%	4%	6%	0%	2%	3%	0%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%	2%	3%	0%	5%	1%	1%	4%	3%	1%	8%	1%	0%	0%	2%	2%	7%	1%	4%	3%	0%
No of respondents	411	202	210	8	174	150	77	122	154	136	70	341	0	53	47	45	88	178	105	225	78

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	12%	14%	11%	15%	13%	17%	3%	16%	10%	11%	14%	12%	0%	16%	7%	16%	11%	12%	13%	7%	25%
Bills show one big change in first year	9%	10%	8%	10%	8%	13%	5%	9%	10%	7%	7%	10%	0%	0%	11%	8%	10%	11%	14%	6%	11%
Bills change steadily every year	79%	76%	81%	75%	80%	71%	92%	74%	79%	82%	79%	79%	0%	84%	81%	76%	79%	77%	73%	87%	64%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
	408	198	210	8	174	147	76	122	153	133	70	338	0	53	47	44	88	175	104	222	78

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£30)	Maintain current service (£25)	Maintain current service (£31)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£6)	Maintain current service (£6)	Maintain current service (£3)
	3. Ensuring the safety of tap water	Meet current and future standards at 51 of treatment works, 2,555 Km of water mains renovated to complete the renovation previously agreed, 229,905 of water company lead pipes replaced to meet new lead standards (£18)	Meet current and future standards at 51 treatment works, 2555 Km of water mains renovated to complete the renovation previously agreed, 229,905 of water company lead pipes replaced to meet new lead standards (£17)	Meet current and future standards at 51 of treatment works, 2,555 Km of water mains renovated to complete the renovation previously agreed, 400,725 of water company lead pipes replaced to meet new lead standards (£18)
	4. Managing the appearance, taste and smell of tap water	54% fewer customer complaints about the appearance, taste or smell of tap water (£4)	54% fewer customer complaints about the appearance, taste or smell of tap water (£3)	54% fewer customer complaints about the appearance, taste or smell of tap water (£4)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£66)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£53)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£70)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 619 to 50, Reduce the number of properties externally flooding from sewers by 142, Reduce the number of properties flooded from blocked sewers by 938. (£8)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£7)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£4)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	217 Km of rivers can better support fish and rare wildlife (£2)	217 Km of rivers can better support fish and rare wildlife (£2)	222 Km of rivers can better support fish and rare wildlife, 2 wetlands and lakes are restored and protected to support rare wildlife (£4)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	394 Km of rivers can better support fish, 273 Km of rivers can support rare wildlife, 1 wetlands and 2 lakes are improved and can support rare wildlife, 3 designated bathing waters are improved (£56)	394 Km of rivers can better support fish, 273 Km of rivers can support rare wildlife,1 wetlands and 2 lakes are improved and can support rare wildlife, 3 designated bathing waters are improved (£52)	979 Km of rivers can better support fish, 313 Km of rivers can support rare wildlife, 1 wetlands and 4 lakes are improved and can support rare wildlife, 4 designated bathing waters are improved (£86)
		Overall cost on average bill by 2010 is £172 (excluding inflation). Overall bill by 2010 is £416 (plus inflation)	Overall cost on average bill by 2010 is £148 (excluding inflation). Overall bill by 2010 is £391 (plus inflation)	Overall cost on average bill by 2010 is £204 (excluding inflation). Overall bill by 2010 is £447 (plus inflation)

1. Key Findings

Wessex Water is a water and sewerage company serving 1.2 million customers with water and 2.5 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £32
Reference Plan A - £33
Reference Plan B - £44

☐ 87% of Wessex Water customers indicated that they were satisfied with the service provided, and only 4% expressed any dissatisfaction. 61% of customers regard the service as good value for money, while 11% said it represented 'fairly' poor value for money. No customer stated that it was 'very' or 'extremely' poor value for money.

☐ Between 71% and 86% indicated that it was important to maintain the current levels of all services, and in particular, (92%) customers highlighted 'handling customer accounts, queries, and customers with special needs' as important to maintain. In terms of customer views on the importance in introducing improvements to services, between 57% and 78% identified all services, with 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' as priority (78%) and 'handling customers accounts, queries, complaints and customers with special needs' (57%) as least important.

☐ Customer approval of proposals in all three company plans (each of which proposed a combination of maintained and improved services) was high. Proposed outputs customers most wanted to see in all three plans were those to 'ensure the safety of tap water' (86% for all three plans), 'ensuring a reliable and continuous water supply' (77%-82%), 'maintaining water pipes, treatment works and reservoirs' (76%-82%) and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (75%-78%). 'Managing the effect of water company activities on water quality in rivers, wetlands, and coastal waters' was least important in all three plans.

☐ 73% of customers said they did not wish to see more improvements than those proposed in the plans, but 12% identified 'ensuring the safety of tap water' as an area which could benefit from further improvements.

☐ Customers regard the Company Preferred Plan and Reference Plan A as better value for money than Reference Plan B (55% and 51% compared to 29%). Similarly, where 44% of customers consider Reference Plan B poor value for money, this proportion is less for the Company Preferred Plan (20%) and Reference Plan A (21%).

☐ The proportion of customers indicating that they were 'willing to pay' was similarly high (71% and 70% respectively) for the Company Preferred Plan (56% probably willing, 15% definitely willing) and Reference Plan A (54% probably willing, 16% definitely willing), and significantly lower (48%) for Reference Plan B (38% probably willing, 10% definitely willing). The proportion of customers indicating that they were 'not willing to pay' ranged from 28% for the Company Preferred Plan (23% probably not willing, 5% definitely not willing) and Reference Plan A (22% probably not willing, 6% definitely not willing) to 49% for Reference Plan B (29% probably not willing, 20% definitely not willing).

☐ Of those customers who indicated they were definitely or probably not willing to pay, 51% said that this was because the 'cost was too much for the improvements' in the Company Preferred Plan and Reference Plan A and 61% said this with reference to Reference Plan B. Between 9% and 15% of all Wessex Water customers indicated that they could not afford the bill increases set out in the proposed company plan (9% for the Company Preferred Plan, 11% for Reference Plan A and 15% for Reference Plan B).

☐ 29% of customers said they would be concerned if some improvements had to be delayed, and 52% said that delays would not concern them. Greatest concern was expressed for delays to 'ensuring the safety of tap water' (14%) and 'ensuring a reliable and continuous water supply (10%).

☐ 77% of Wessex Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £4-£5/annum), 'managing the appearance, taste and smell of tap water' (£2/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£4-£5/annum).

2. Introduction

The attitudes and preferences of Wessex Water customers, reported in section 3, are based on a sample of 181 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty years
	3. Ensuring the safety of tap water	99.93% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 3,000 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	330 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 99.9% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	840 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	22 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	90% of rivers are of good, 6% fair and 4% poor quality.100% of designated bathing waters meet minimum standards and 65% meet higher standards.72% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £254 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very dissatisfied	1%	1%	1%	0%	1%	0%	2%	0%	1%	2%	0%	1%	0%	0%	3%	0%	2%	0%	0%	0%	4%
Fairly dissatisfied	3%	3%	3%	0%	1%	2%	8%	6%	1%	2%	4%	3%	0%	0%	4%	6%	0%	3%	3%	4%	1%
Neither satisfied nor dissatisfied	9%	12%	7%	0%	9%	8%	8%	5%	8%	16%	7%	9%	0%	21%	6%	3%	10%	10%	7%	12%	4%
Fairly satisfied	49%	50%	48%	68%	59%	47%	36%	45%	54%	47%	59%	46%	0%	18%	58%	50%	41%	56%	59%	56%	28%
Very satisfied	31%	27%	35%	19%	25%	37%	33%	39%	29%	24%	23%	34%	0%	55%	17%	34%	41%	25%	27%	21%	52%
Extremely satisfied	7%	7%	7%	14%	5%	5%	12%	6%	7%	9%	7%	7%	0%	6%	12%	7%	6%	6%	4%	8%	10%
Dont know/cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very poor value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fairly poor value	11%	12%	10%	0%	8%	9%	19%	7%	10%	17%	12%	11%	0%	19%	10%	5%	5%	16%	9%	9%	17%
Neither poor nor good value	22%	22%	22%	0%	26%	21%	19%	22%	25%	17%	27%	19%	0%	6%	28%	11%	31%	23%	25%	23%	14%
Fairly good value	43%	48%	38%	48%	40%	46%	43%	46%	43%	40%	49%	42%	0%	52%	40%	52%	39%	41%	35%	53%	37%
Very good value	16%	15%	17%	19%	18%	12%	17%	18%	12%	17%	12%	17%	0%	24%	18%	25%	18%	7%	18%	7%	27%
Extremely good value	2%	1%	2%	14%	0%	2%	1%	2%	3%	0%	0%	2%	0%	0%	0%	2%	4%	1%	1%	0%	5%
Dont know/cant say	7%	4%	10%	20%	8%	9%	0%	5%	7%	9%	0%	9%	0%	0%	4%	6%	3%	13%	11%	8%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	84%	84%	84%	80%	82%	83%	88%	83%	84%	86%	82%	85%	0%	94%	93%	72%	88%	81%	69%	87%	96%
Ensuring a reliable & continuous water supply	84%	86%	82%	100%	85%	80%	86%	86%	81%	86%	77%	86%	0%	100%	92%	79%	82%	81%	70%	88%	95%
Ensuring the safety of tap water	75%	72%	79%	100%	72%	74%	79%	80%	67%	81%	51%	83%	0%	100%	96%	55%	74%	71%	57%	76%	97%
Managing the appearance, taste & smell of tap water	71%	68%	74%	80%	69%	70%	74%	71%	65%	79%	45%	79%	0%	94%	91%	57%	70%	64%	54%	72%	88%
Managing the pressure of water in your taps & the number of unplanned interruptions	86%	87%	84%	66%	81%	83%	97%	81%	89%	86%	74%	89%	0%	94%	83%	89%	85%	83%	88%	82%	88%
Handling customers' accounts, queries, complaints & customers with special needs	92%	94%	91%	100%	88%	94%	95%	88%	93%	97%	94%	92%	0%	94%	97%	91%	89%	93%	91%	97%	86%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	82%	78%	86%	100%	80%	80%	84%	82%	74%	92%	68%	86%	0%	94%	98%	67%	82%	79%	68%	85%	93%
Avoid the risk of homes & gardens being flooded with sewerage	78%	77%	78%	100%	77%	74%	81%	80%	73%	81%	51%	86%	0%	100%	96%	70%	66%	76%	66%	75%	97%
Managing the amount of water taken from the environment to supply customers	75%	72%	78%	66%	65%	80%	82%	76%	76%	71%	55%	81%	0%	88%	80%	73%	71%	72%	67%	71%	90%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	73%	71%	74%	66%	67%	79%	70%	76%	69%	74%	47%	80%	0%	88%	83%	64%	71%	69%	61%	71%	89%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	69%	72%	66%	39%	67%	76%	69%	66%	76%	64%	77%	68%	0%	63%	53%	84%	83%	64%	83%	69%	56%
Ensuring a reliable & continuous water supply	64%	65%	64%	52%	63%	62%	71%	63%	69%	58%	79%	60%	0%	54%	54%	79%	65%	63%	72%	64%	57%
Ensuring the safety of tap water	73%	73%	73%	66%	75%	74%	73%	71%	78%	69%	82%	71%	0%	75%	59%	88%	77%	70%	81%	79%	58%
Managing the appearance, taste & smell of tap water	72%	71%	72%	46%	80%	64%	73%	79%	72%	64%	67%	73%	0%	76%	72%	78%	80%	64%	71%	72%	71%
Managing the pressure of water in your taps & the number of unplanned interruptions	63%	63%	63%	52%	64%	63%	65%	60%	66%	61%	80%	58%	0%	50%	50%	74%	69%	62%	76%	60%	54%
Handling customers' accounts, queries, complaints & customers with special needs	57%	57%	56%	52%	59%	53%	60%	50%	60%	60%	73%	52%	0%	50%	51%	71%	45%	60%	65%	58%	47%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	78%	77%	80%	66%	80%	75%	84%	73%	83%	78%	82%	78%	0%	59%	84%	82%	84%	75%	82%	87%	63%
Avoid the risk of homes & gardens being flooded with sewerage	75%	77%	72%	52%	73%	76%	81%	74%	81%	67%	82%	73%	0%	64%	54%	83%	84%	77%	80%	81%	61%
Managing the amount of water taken from the environment to supply customers	69%	67%	71%	66%	69%	67%	73%	70%	71%	66%	80%	66%	0%	40%	62%	80%	70%	73%	79%	72%	53%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	75%	75%	75%	66%	73%	79%	71%	77%	76%	71%	83%	72%	0%	53%	67%	77%	81%	78%	83%	81%	54%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	76%	68%	84%	52%	78%	72%	86%	68%	82%	80%	83%	75%	0%	67%	75%	85%	70%	79%	89%	69%	77%
Ensuring a reliable & continuous water supply	77%	69%	84%	52%	79%	71%	87%	73%	80%	77%	82%	76%	0%	68%	73%	82%	74%	79%	89%	70%	75%
Ensuring the safety of tap water	86%	87%	85%	100%	80%	85%	95%	81%	91%	86%	90%	85%	0%	94%	82%	92%	81%	87%	91%	80%	89%
Managing the appearance, taste & smell of tap water	76%	75%	78%	80%	76%	72%	81%	70%	86%	70%	88%	72%	0%	60%	72%	86%	76%	77%	89%	74%	64%
Managing the pressure of water in your taps & the number of unplanned interruptions	69%	65%	73%	32%	69%	69%	76%	62%	81%	61%	81%	66%	0%	54%	68%	73%	70%	71%	83%	64%	63%
Handling customers' accounts, queries, complaints & customers with special needs	64%	60%	67%	32%	64%	65%	68%	57%	70%	63%	75%	61%	0%	61%	42%	71%	63%	71%	83%	62%	46%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	78%	81%	76%	100%	71%	77%	87%	73%	83%	78%	86%	76%	0%	87%	78%	80%	75%	77%	93%	72%	71%
Avoid the risk of homes & gardens being flooded with sewerage	75%	69%	81%	52%	69%	76%	82%	73%	79%	71%	82%	72%	0%	56%	65%	74%	82%	79%	91%	69%	65%
Managing the amount of water taken from the environment to supply customers	72%	70%	74%	52%	68%	76%	73%	74%	75%	65%	81%	69%	0%	59%	62%	84%	67%	77%	87%	69%	58%
Managing the amount of water taken from the environment to supply customers	68%	64%	71%	52%	61%	74%	67%	71%	70%	61%	73%	65%	0%	45%	49%	80%	66%	75%	87%	62%	52%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	66%	62%	70%	52%	62%	67%	72%	67%	69%	61%	75%	63%	0%	51%	47%	77%	63%	74%	87%	61%	48%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	81%	76%	86%	52%	81%	81%	88%	79%	85%	78%	88%	80%	0%	73%	71%	87%	89%	80%	89%	75%	84%
Ensuring a reliable & continuous water supply	82%	78%	86%	66%	79%	82%	90%	83%	86%	74%	88%	81%	0%	66%	73%	87%	93%	80%	89%	76%	85%
Ensuring the safety of tap water	86%	87%	86%	100%	81%	87%	95%	79%	93%	86%	95%	84%	0%	94%	78%	93%	85%	86%	89%	82%	93%
Managing the appearance, taste & smell of tap water	75%	71%	79%	80%	75%	74%	80%	72%	82%	68%	87%	72%	0%	59%	68%	85%	78%	75%	86%	75%	63%
Managing the pressure of water in your taps & the number of unplanned interruptions	68%	64%	73%	46%	64%	73%	73%	65%	80%	57%	85%	64%	0%	52%	57%	76%	73%	71%	84%	66%	55%
Handling customers' accounts, queries, complaints & customers with special needs	65%	58%	71%	32%	64%	68%	67%	62%	70%	61%	79%	61%	0%	52%	44%	72%	68%	72%	84%	64%	46%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	75%	75%	76%	86%	71%	77%	81%	71%	77%	78%	85%	73%	0%	80%	76%	76%	78%	73%	87%	71%	71%
Avoid the risk of homes & gardens being flooded with sewerage	71%	63%	79%	52%	68%	71%	81%	70%	77%	65%	86%	67%	0%	51%	56%	78%	77%	76%	88%	66%	61%
Managing the amount of water taken from the environment to supply customers	68%	63%	73%	66%	66%	73%	66%	72%	72%	57%	84%	63%	0%	37%	53%	76%	78%	71%	83%	69%	50%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	60%	57%	62%	52%	54%	66%	63%	60%	64%	53%	73%	56%	0%	30%	37%	69%	65%	69%	83%	55%	42%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	82%	78%	86%	66%	81%	81%	86%	78%	86%	80%	86%	80%	0%	67%	74%	86%	89%	82%	91%	76%	81%
Ensuring a reliable & continuous water supply	81%	77%	85%	66%	78%	82%	86%	80%	87%	75%	87%	79%	0%	55%	70%	90%	91%	83%	91%	76%	79%
Ensuring the safety of tap water	86%	88%	83%	100%	77%	89%	91%	80%	90%	86%	92%	84%	0%	76%	81%	89%	91%	85%	91%	82%	85%
Managing the appearance, taste & smell of tap water	76%	73%	78%	80%	75%	78%	73%	74%	80%	70%	83%	73%	0%	48%	72%	87%	86%	72%	89%	76%	59%
Managing the pressure of water in your taps & the number of unplanned interruptions	69%	65%	73%	32%	65%	76%	69%	68%	76%	61%	79%	66%	0%	48%	57%	72%	80%	71%	87%	66%	54%
Handling customers' accounts, queries, complaints & customers with special needs	65%	60%	69%	32%	66%	68%	63%	66%	69%	59%	75%	62%	0%	40%	45%	72%	76%	70%	87%	61%	45%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	77%	78%	76%	86%	73%	79%	79%	77%	76%	78%	82%	75%	0%	74%	72%	77%	86%	74%	91%	72%	68%
Avoid the risk of homes & gardens being flooded with sewerage	68%	62%	74%	52%	64%	67%	77%	69%	73%	61%	79%	65%	0%	34%	53%	74%	75%	75%	91%	60%	54%
Managing the amount of water taken from the environment to supply customers	68%	64%	72%	66%	69%	71%	63%	75%	67%	61%	80%	64%	0%	37%	53%	75%	83%	70%	87%	67%	47%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	59%	54%	63%	32%	55%	65%	58%	61%	61%	53%	69%	55%	0%	24%	39%	71%	69%	64%	85%	54%	35%
No of respondents	179	88	91	5	66	64	45	59	69	51	44	136	0	15	29	31	38	67	56	76	47

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	6%
Ensuring a reliable & continuous water supply	5%
Ensuring the safety of tap water	12%
Managing the appearance, taste & smell of tap water	8%
Managing the pressure of water in your taps & the number of unplanned interruptions	4%
Handling customers' accounts, queries, complaints & customers with special needs	2%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	8%
Avoid the risk of homes & gardens being flooded with sewerage	3%
Managing the amount of water taken from the environment to supply customers	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	2%
(further) reduce sewerage treatment works smells	1%
(further) improve cleanliness of the rivers	1%
maintain the correct service level	1%
No, none	73%
No of respondents	181

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	4%	0%	0%	2%	1%	0%	4%	2%	0%	3%	1%	0%	0%	0%	0%	0%	5%	4%	0%	0%
Very poor value	4%	3%	4%	0%	2%	6%	4%	3%	3%	6%	4%	4%	0%	0%	6%	0%	0%	7%	0%	8%	2%
Fairly poor value	14%	12%	16%	0%	22%	6%	15%	16%	13%	12%	14%	14%	0%	14%	9%	19%	12%	14%	19%	10%	15%
Neither poor nor good value	23%	18%	28%	0%	22%	28%	20%	18%	24%	27%	22%	24%	0%	19%	31%	26%	17%	22%	26%	27%	14%
Fairly good value	45%	53%	38%	86%	43%	45%	47%	42%	50%	44%	53%	44%	0%	63%	48%	33%	57%	40%	42%	44%	52%
Very good value	8%	5%	12%	14%	7%	10%	7%	11%	6%	9%	5%	10%	0%	0%	7%	22%	4%	7%	6%	9%	11%
Extremely good value	2%	2%	2%	0%	0%	4%	3%	4%	2%	0%	0%	3%	0%	4%	0%	0%	7%	1%	0%	2%	5%
Dont know/cant say	2%	2%	1%	0%	2%	0%	5%	1%	2%	2%	0%	2%	0%	0%	0%	0%	3%	3%	4%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	1%	3%	0%	0%	2%	2%	0%	1%	3%	0%	3%	1%	0%	0%	2%	0%	0%	3%	4%	1%	0%
Very poor value	5%	3%	6%	0%	3%	7%	5%	3%	4%	8%	4%	5%	0%	0%	4%	3%	0%	10%	2%	8%	3%
Fairly poor value	15%	12%	18%	0%	22%	7%	19%	17%	12%	17%	19%	14%	0%	19%	12%	12%	16%	17%	18%	12%	17%
Neither poor nor good value	23%	24%	23%	14%	24%	25%	22%	26%	22%	23%	24%	23%	0%	31%	35%	33%	22%	13%	18%	30%	20%
Fairly good value	42%	46%	39%	86%	44%	44%	33%	35%	52%	38%	49%	40%	0%	40%	40%	41%	50%	41%	48%	37%	44%
Very good value	6%	2%	10%	0%	1%	11%	7%	8%	3%	9%	2%	7%	0%	0%	7%	3%	5%	9%	3%	6%	10%
Extremely good value	3%	4%	2%	0%	2%	4%	3%	7%	2%	0%	0%	4%	0%	4%	0%	8%	4%	1%	1%	4%	3%
Dont know/cant say	3%	4%	2%	0%	2%	0%	11%	3%	2%	6%	0%	4%	0%	6%	0%	0%	3%	6%	5%	1%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	179	88	91	5	66	64	45	59	69	51	44	136	0	15	29	31	38	67	56	76	47

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	4%	6%	0%	7%	3%	5%	8%	4%	2%	9%	4%	0%	0%	9%	5%	3%	6%	8%	6%	0%
Very poor value	13%	14%	11%	0%	9%	17%	14%	6%	14%	18%	7%	15%	0%	19%	6%	16%	7%	16%	14%	10%	16%
Fairly poor value	26%	19%	32%	19%	32%	16%	30%	30%	20%	28%	28%	25%	0%	31%	36%	15%	15%	31%	21%	31%	23%
Neither poor nor good value	23%	27%	19%	0%	24%	29%	15%	19%	31%	17%	36%	19%	0%	12%	11%	33%	30%	22%	24%	27%	16%
Fairly good value	22%	24%	21%	81%	19%	26%	14%	19%	24%	23%	19%	24%	0%	38%	28%	15%	34%	14%	22%	21%	26%
Very good value	5%	3%	8%	0%	4%	6%	7%	9%	4%	4%	2%	7%	0%	0%	4%	9%	8%	5%	5%	3%	10%
Extremely good value	2%	2%	2%	0%	2%	1%	1%	4%	1%	0%	0%	2%	0%	0%	0%	8%	0%	1%	1%	2%	1%
Dont know/cant say	4%	6%	2%	0%	2%	2%	13%	4%	2%	8%	0%	6%	0%	0%	7%	0%	3%	7%	5%	1%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	179	88	91	5	66	64	45	59	69	51	44	136	0	15	29	31	38	67	56	76	47

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	5%	5%	4%	0%	3%	7%	3%	1%	5%	8%	4%	5%	0%	20%	0%	2%	0%	7%	4%	3%	9%
Probably not willing to pay	23%	23%	22%	0%	26%	24%	21%	21%	22%	25%	19%	24%	0%	19%	32%	18%	21%	23%	19%	29%	17%
Probably willing to pay	56%	57%	55%	100%	50%	58%	55%	52%	61%	56%	66%	52%	0%	54%	55%	56%	58%	56%	64%	50%	55%
Definitely willing to pay	15%	13%	16%	0%	17%	11%	18%	23%	12%	8%	11%	16%	0%	0%	7%	25%	21%	12%	11%	16%	17%
Dont know/Cant say	2%	1%	3%	0%	4%	0%	2%	2%	0%	4%	0%	3%	0%	6%	5%	0%	0%	2%	2%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	5%	9%	0%	0%	8%	4%	0%	18%	0%	0%	16%	2%	0%	0%	0%	0%	0%	12%	7%	6%	0%
Cost too much for improvements	51%	53%	48%	0%	67%	33%	55%	48%	77%	24%	63%	48%	0%	0%	18%	89%	67%	62%	81%	49%	24%
Cant afford it	34%	22%	47%	0%	25%	40%	39%	23%	10%	70%	6%	41%	0%	100%	71%	0%	13%	17%	12%	37%	50%
Dont know/Cant say	10%	16%	4%	0%	0%	22%	6%	11%	13%	6%	16%	9%	0%	0%	11%	11%	20%	9%	0%	7%	26%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	50	26	24	0	19	20	11	14	19	17	10	39	0	6	9	6	8	20	13	25	12

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		0				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	0	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	6%	6%	5%	0%	7%	7%	3%	1%	8%	8%	4%	6%	0%	14%	2%	2%	3%	8%	4%	5%	9%
Probably not willing to pay	22%	22%	23%	0%	27%	16%	28%	23%	20%	25%	17%	24%	0%	32%	35%	22%	13%	20%	20%	27%	18%
Probably willing to pay	54%	57%	51%	100%	45%	61%	53%	47%	58%	58%	69%	49%	0%	54%	51%	55%	56%	54%	60%	49%	56%
Definitely willing to pay	16%	14%	18%	0%	18%	17%	14%	26%	14%	6%	11%	18%	0%	0%	7%	21%	28%	14%	15%	16%	17%
Dont know/Cant say	2%	1%	3%	0%	4%	0%	2%	2%	0%	4%	0%	3%	0%	0%	5%	0%	0%	3%	2%	3%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	179	88	91	5	66	64	45	59	69	51	44	136	0	15	29	31	38	67	56	76	47

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	8%	11%	6%	0%	7%	14%	5%	16%	10%	0%	0%	10%	0%	0%	0%	0%	23%	14%	26%	3%	0%
Cost too much for improvements	51%	58%	44%	0%	72%	24%	46%	50%	77%	24%	87%	43%	0%	0%	34%	100%	61%	56%	62%	56%	30%
Cant afford it	39%	31%	48%	0%	21%	62%	45%	34%	10%	76%	6%	47%	0%	100%	66%	0%	17%	27%	12%	42%	65%
Dont know/Cant say	1%	0%	2%	0%	0%	0%	4%	0%	3%	0%	6%	0%	0%	0%	0%	0%	0%	3%	0%	0%	5%
TOTAL	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	50	24	25	0	22	14	13	15	18	17	9	41	0	7	10	8	6	19	13	24	12

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	20%	22%	18%	19%	15%	17%	30%	17%	19%	24%	13%	22%	0%	33%	24%	17%	3%	26%	19%	14%	30%
Probably not willing to pay	29%	27%	31%	0%	43%	19%	27%	33%	25%	31%	44%	24%	0%	31%	35%	30%	27%	26%	26%	37%	20%
Probably willing to pay	38%	40%	35%	81%	30%	50%	26%	28%	49%	34%	41%	36%	0%	36%	27%	36%	52%	35%	42%	38%	33%
Definitely willing to pay	10%	7%	12%	0%	11%	10%	9%	19%	6%	4%	2%	12%	0%	0%	4%	17%	17%	7%	10%	8%	11%
Dont know/Cant say	4%	4%	3%	0%	2%	3%	8%	3%	2%	8%	0%	5%	0%	0%	11%	0%	0%	6%	3%	3%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	179	88	91	5	66	64	45	59	69	51	44	136	0	15	29	31	38	67	56	76	47

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	6%	9%	3%	0%	4%	5%	11%	10%	8%	0%	12%	4%	0%	0%	0%	4%	12%	10%	10%	8%	0%
Cost too much for improvements	61%	61%	61%	100%	70%	54%	53%	60%	80%	41%	66%	59%	0%	29%	37%	96%	65%	65%	76%	58%	49%
Cant afford it	30%	26%	35%	0%	26%	34%	34%	25%	10%	59%	13%	37%	0%	71%	63%	0%	9%	23%	14%	34%	42%
Dont know/Cant say	2%	4%	1%	0%	0%	7%	2%	5%	2%	0%	9%	0%	0%	0%	0%	0%	14%	2%	0%	0%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	88	43	45	1	38	23	25	30	30	28	25	63	0	10	17	15	12	35	25	39	23

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	12%	10%	13%	0%	12%	9%	16%	13%	8%	15%	16%	10%	0%	14%	24%	6%	10%	10%	8%	3%	30%
Not very concerned	30%	38%	23%	53%	30%	26%	33%	30%	33%	27%	25%	32%	0%	27%	36%	34%	30%	27%	23%	37%	28%
Fairly concerned	29%	26%	32%	47%	33%	29%	22%	30%	25%	33%	20%	32%	0%	37%	18%	30%	35%	28%	32%	31%	23%
Very concerned	25%	25%	25%	0%	20%	34%	24%	23%	32%	18%	37%	21%	0%	17%	17%	30%	23%	29%	34%	26%	14%
Dont know/cant say	4%	1%	7%	0%	5%	2%	5%	4%	2%	7%	1%	5%	0%	4%	5%	0%	2%	6%	3%	4%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	179	88	91	5	66	64	45	59	69	51	44	136	0	15	29	31	38	67	56	76	47

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	2%	1%	4%	0%	2%	1%	4%	3%	2%	2%	4%	2%	0%	0%	0%	4%	2%	3%	0%	2%	5%
Ensuring a reliable & continuous water supply	10%	11%	10%	0%	11%	10%	12%	10%	8%	14%	9%	11%	0%	5%	13%	8%	13%	11%	8%	9%	16%
Ensuring the safety of tap water	14%	10%	19%	0%	20%	9%	16%	10%	13%	22%	20%	13%	0%	16%	11%	13%	10%	19%	16%	14%	13%
Managing the appearance, taste & smell of tap water	1%	2%	0%	0%	2%	0%	0%	3%	0%	0%	0%	1%	0%	0%	0%	5%	0%	0%	0%	2%	0%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	0%	1%	0%	0%	2%	0%	0%	0%	2%	0%	1%	0%	0%	4%	0%	0%	0%	0%	0%	2%
Handling customers' accounts, queries, complaints & customers with special needs	1%	3%	0%	0%	3%	0%	0%	0%	2%	2%	3%	1%	0%	8%	0%	0%	3%	0%	0%	3%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	5%	4%	5%	20%	5%	6%	2%	3%	6%	6%	2%	6%	0%	30%	0%	0%	8%	2%	4%	5%	6%
Avoid the risk of homes & gardens being flooded with sewerage	5%	3%	8%	20%	6%	4%	5%	3%	1%	14%	5%	5%	0%	6%	6%	0%	8%	6%	6%	5%	5%
Managing the amount of water taken from the environment to supply customers	1%	2%	1%	0%	2%	1%	0%	4%	0%	0%	2%	1%	0%	0%	0%	5%	0%	1%	0%	3%	0%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%	4%	1%	0%	2%	4%	2%	8%	0%	0%	2%	3%	0%	0%	0%	8%	4%	1%	2%	3%	3%
No of respondents	181	90	91	5	66	64	45	61	69	51	44	136	0	15	29	31	38	68	56	76	47

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	16%	16%	16%	34%	19%	15%	12%	15%	16%	17%	15%	16%	0%	13%	20%	4%	18%	20%	18%	11%	21%
Bills show one big change in first year	7%	8%	6%	0%	10%	4%	9%	2%	6%	16%	3%	9%	0%	22%	16%	4%	3%	4%	5%	7%	10%
Bills change steadily every year	77%	75%	78%	66%	71%	82%	79%	84%	78%	67%	82%	75%	0%	66%	64%	92%	79%	76%	77%	81%	69%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
	177	87	90	5	66	64	42	58	69	50	42	135	0	15	29	31	37	66	55	75	47

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£4)	Maintain current service (£3)	Maintain current service (£3)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£7)	Maintain current service (£7)	Maintain current service (£7)
	3. Ensuring the safety of tap water	Meet current and future standards at 17 of treatment works.120 Km of water mains renovated to complete the renovation previously agreed. 2,500 of water company lead pipes replaced to meet new lead standards (£4)	Meet current and future standards at 17 treatment works,120 Km of water mains renovated to complete the renovation previously agreed, 2,500 of water company lead pipes replaced to meet new lead standards (£4)	Meet current and future standards at 17 of treatment works120 Km of water mains renovated to complete the renovation previously agreed 12,300 of water company lead pipes replaced to meet new lead standards (£5)
	4. Managing the appearance, taste and smell of tap water	10% fewer customer complaints about the appearance, taste or smell of tap water (£2)	10% fewer customer complaints about the appearance, taste or smell of tap water (£2)	10 % fewer customer complaints about the appearance, taste or smell of tap water (£2)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£5)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£4)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£4)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 813 to 100 (£5)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£5)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£7)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	43 Km of rivers can better support fish and rare wildlife (£2)	87 Km of rivers can better support fish and rare wildlife (£5)	137 Km of rivers can better support fish and rare wildlife (£7)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	43 Km of rivers can better support fish, 11 Km of rivers can support rare wildlife (£12)	346 Km of rivers can better support fish, 314 Km of rivers and 3 Km2 of coastal waters can support rare wildlife (£17)	544 Km of rivers can better support fish, 314 Km of rivers and 3 Km2 of coastal waters can support rare wildlife ,3 designated bathing waters are improved (£14)
	11. Other	Continue to replace customers' supply pipes free of charge		
		Overall cost on average bill taking account of cost savings (excluding inflation) £32. Overall bill by 2010 is £296 (plus inflation)	Overall cost on average bill by 2010 is £33 (excluding inflation). Overall bill by 2010 is £297 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £44 (excluding inflation). Overall bill by 2010 is £309 (plus inflation)

1. Key Findings

Bournemouth and West Hampshire Water is a water supply only company providing a population of up to 484,000 with water services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £59 (where Wessex Water provides wastewater services) and £99 (where Southern Water provides wastewater services)
Reference Plan A - £70 and £115 (as above)
Reference Plan B - £76 and £145 (as above)

☐ 78% of customers indicated that they are satisfied with the current service whilst only 9% are dissatisfied. 39% of customers regard the service as good value for money; 19% regard the service as poor value for money.

☐ 85-95% of customers wish for services to be maintained at the current level, and 58% to 79% of all customers would like to see improvements to all services introduced. Customers thought it most important (95%) to 'maintain water pipes, treatment works and reservoirs' and 'ensure the safety of tap water' (94%). Lower priority was given to 'handing customer accounts, queries, complaints and customers with special needs' (85%). Customers thought it most important for improvements to 'water pipes, treatment works and reservoirs' (79%), 'safety of tap water' (78%) and 'managing the appearance taste and smell of tap water' (77%) to be introduced by 2010. Least importance was attached to improvements in 'handling customer accounts, queries, complaints and customers with special needs' (58%).

☐ The Company Preferred Plan has around 3 percentage points more approval than Reference Plans A or B. Reference Plans A and B share broadly the same level of approval. Across all three company plans,(each of which proposed a combination of maintained and improved services), the proposed outputs for 'ensuring the safety of tap water' had the greatest approval (69% -73%). Overall, second, third and fourth most approved service elements were 'managing the appearance, taste and smell of tap water' (61% - 66%), 'avoiding the risk of home and gardens being flooded with sewage' (59% -65%) and 'maintaining sewers, sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (59%-62%).

☐ When asked to identify service areas where they would like to see further improvements to those noted in the plans, 78% said 'none'.

☐ Most customers thought that the plans represented poor value for money. For the Company Preferred Plan, the split between poor and good value was roughly even with 37% rating it as poor value, and 35% as good. For Reference Plan A, 47% felt it represented poor value and 31% good, and for Reference Plan B 52% rated it as poor value and 26% as good.

☐ 59% of customers reported a willingness to pay (51% probably willing, 8% definitely willing) for the Company Preferred Plan, against 36% who were not willing to pay (24% probably not willing, 12% definitely not willing). When referring to Reference Plan A, 53% (48% probably willing, 5% definitely willing) customers were willing to pay, and 44% were not willing to pay (30% probably not willing, 14% definitely not willing). Of the three plans customers were most (51%) unwilling to pay for Reference Plan B (25% probably not willing, 26% definitely not willing), whilst 46% were willing (40% probably willing, 6% definitely willing).

☐ Of those customers who indicated they were not willing to pay, most said that this was because 'the cost was too much for the improvements' (64% Company Preferred Plan, 62% Reference Plan A and 66% Reference Plan B). 10% of all Bournemouth and West Hampshire Water customers indicated that they could not afford the bill increases set out in the Company Preferred Plan. This proportion was 14% for Reference Plan A and 16% for Reference Plan B.

☐ 42% of customers suggested that they would be concerned if some of the improvements were delayed until after 2010 and 51% would not be concerned. The greatest cause for concern was delays to 'safety of water' service improvements for which 14% of customers showed concern.

☐ 86% of Bournemouth and West Hampshire Water customers indicated that their preferred bill option for the period 2005 to 2010 is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the four which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of up to £2/annum), 'managing the appearance, taste and smell of tap water' (£1-£2/annum), 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£4-£5/annum) and 'avoiding the risk of homes and gardens being flooded with sewage' (£5-£7/annum).

2. Introduction

The attitudes and preferences of Bournemouth and West Hampshire Water customers, reported in section 3, are based on a sample of 197 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services (Southern)

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty years
	3. Ensuring the safety of tap water	99.88% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 382 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	200 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.5% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	507 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	2 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	83% of rivers are of good, 10% fair and 7% poor quality. 99% of designated bathing waters meet minimum standards and 76% meet higher standards. 58% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £258 per annum

Current Provision of Water and Sewerage Services (Wessex)

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty years
	3. Ensuring the safety of tap water	99.88% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 382 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	200 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.5% of billing enquiries answered within 5 days and 99.6% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	840 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	2 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	90% of rivers are of good, 6% fair and 4% poor quality. 100% of designated bathing waters meet minimum standards and 65% meet higher standards. 72% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £237 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	2%	2%	1%	0%	1%	4%	0%	0%	2%	3%	2%	2%	0%	0%	0%	0%	5%	2%	3%	1%	0%
Very dissatisfied	3%	5%	2%	0%	2%	3%	5%	0%	7%	2%	6%	2%	0%	0%	0%	0%	3%	8%	2%	5%	0%
Fairly dissatisfied	4%	5%	2%	0%	2%	5%	4%	4%	5%	0%	4%	3%	0%	0%	0%	1%	7%	6%	4%	4%	2%
Neither satisfied nor dissatisfied	11%	10%	12%	27%	4%	21%	8%	1%	7%	31%	9%	13%	0%	32%	28%	1%	7%	3%	4%	16%	12%
Fairly satisfied	30%	29%	32%	20%	34%	24%	33%	34%	26%	32%	29%	31%	0%	31%	38%	24%	36%	25%	30%	33%	20%
Very satisfied	41%	39%	44%	53%	52%	35%	38%	52%	40%	30%	42%	41%	0%	36%	32%	61%	42%	41%	45%	34%	62%
Extremely satisfied	7%	8%	5%	0%	6%	5%	10%	7%	9%	2%	7%	7%	0%	0%	2%	12%	1%	12%	10%	5%	3%
Dont know/cant say	2%	1%	2%	0%	0%	4%	1%	2%	3%	0%	2%	1%	100%	0%	0%	1%	0%	4%	2%	2%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	3%	3%	3%	0%	1%	2%	6%	0%	4%	6%	1%	4%	0%	0%	0%	3%	5%	5%	5%	2%	0%
Very poor value	5%	7%	2%	0%	1%	5%	9%	2%	7%	5%	2%	5%	100%	0%	7%	10%	3%	4%	7%	2%	8%
Fairly poor value	11%	11%	10%	41%	12%	10%	8%	10%	14%	6%	13%	9%	0%	21%	6%	12%	14%	9%	12%	9%	14%
Neither poor nor good value	33%	33%	33%	27%	31%	38%	31%	27%	28%	49%	31%	34%	0%	65%	48%	11%	32%	25%	25%	41%	19%
Fairly good value	30%	28%	32%	32%	35%	28%	28%	39%	30%	19%	31%	30%	0%	7%	27%	48%	25%	34%	29%	31%	36%
Very good value	7%	6%	8%	0%	9%	8%	5%	10%	4%	9%	4%	9%	0%	7%	4%	14%	10%	6%	9%	5%	10%
Extremely good value	2%	3%	1%	0%	2%	0%	4%	5%	0%	0%	4%	1%	0%	0%	0%	0%	4%	4%	4%	0%	5%
Dont know/cant say	9%	8%	11%	0%	10%	8%	9%	6%	13%	6%	12%	8%	0%	0%	9%	3%	8%	14%	10%	9%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	94%	93%	95%	100%	95%	94%	93%	98%	96%	86%	97%	93%	100%	86%	92%	100%	92%	96%	99%	89%	100%
Ensuring a reliable & continuous water supply	92%	90%	95%	100%	92%	92%	93%	98%	94%	83%	95%	91%	100%	93%	89%	96%	92%	93%	100%	84%	100%
Ensuring the safety of tap water	94%	95%	94%	100%	96%	94%	93%	100%	96%	84%	92%	95%	100%	93%	88%	100%	97%	95%	100%	90%	100%
Managing the appearance, taste & smell of tap water	92%	91%	94%	100%	92%	94%	91%	98%	91%	87%	88%	94%	100%	93%	88%	96%	97%	92%	97%	89%	100%
Managing the pressure of water in your taps & the number of unplanned interruptions	90%	91%	89%	73%	92%	90%	89%	98%	86%	84%	87%	91%	100%	92%	89%	100%	93%	85%	93%	84%	100%
Handling customers' accounts, queries, complaints & customers with special needs	85%	85%	85%	100%	82%	86%	86%	93%	85%	77%	81%	87%	100%	78%	78%	96%	91%	85%	92%	78%	95%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	95%	93%	96%	100%	96%	96%	92%	100%	95%	87%	94%	95%	100%	93%	90%	100%	94%	96%	100%	91%	100%
Avoid the risk of homes & gardens being flooded with sewerage	92%	90%	94%	100%	96%	90%	90%	99%	92%	84%	91%	93%	100%	93%	87%	98%	97%	91%	98%	88%	95%
Managing the amount of water taken from the environment to supply customers	90%	88%	91%	68%	97%	91%	83%	96%	94%	75%	89%	90%	100%	86%	86%	99%	90%	90%	93%	87%	97%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	90%	89%	90%	73%	95%	93%	83%	98%	92%	75%	90%	90%	100%	86%	83%	99%	93%	90%	93%	87%	97%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	71%	66%	76%	41%	78%	79%	59%	61%	80%	69%	64%	74%	100%	75%	73%	78%	70%	67%	76%	72%	55%
Ensuring a reliable & continuous water supply	71%	63%	77%	41%	79%	79%	57%	66%	74%	71%	64%	73%	100%	75%	76%	81%	70%	62%	74%	69%	76%
Ensuring the safety of tap water	78%	74%	81%	68%	82%	80%	73%	74%	83%	77%	73%	80%	100%	82%	75%	82%	82%	75%	86%	74%	73%
Managing the appearance, taste & smell of tap water	77%	80%	75%	73%	78%	82%	72%	74%	77%	82%	76%	78%	100%	81%	77%	84%	79%	73%	78%	82%	60%
Managing the pressure of water in your taps & the number of unplanned interruptions	66%	63%	69%	20%	72%	71%	59%	61%	66%	74%	62%	68%	100%	81%	76%	67%	71%	54%	65%	72%	53%
Handling customers' accounts, queries, complaints & customers with special needs	58%	54%	63%	68%	60%	64%	51%	48%	64%	62%	49%	62%	100%	66%	57%	59%	64%	54%	65%	57%	43%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	79%	77%	81%	100%	79%	83%	73%	79%	80%	77%	79%	79%	100%	82%	73%	87%	90%	74%	89%	77%	56%
Avoid the risk of homes & gardens being flooded with sewerage	74%	73%	76%	68%	80%	83%	63%	75%	74%	74%	67%	77%	100%	82%	75%	84%	85%	63%	84%	74%	45%
Managing the amount of water taken from the environment to supply customers	70%	67%	73%	68%	83%	75%	55%	69%	74%	66%	70%	70%	100%	75%	71%	73%	81%	62%	72%	73%	61%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	####	67%	70%	41%	81%	77%	53%	65%	73%	67%	65%	71%	100%	72%	73%	68%	77%	62%	73%	72%	49%
No of respondents	195	94	100	5	60	62	67	66	78	50	60	134	1	16	45	26	37	71	81	92	18

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	60%	66%	55%	100%	61%	56%	60%	58%	62%	61%	59%	60%	100%	67%	54%	79%	51%	60%	65%	60%	48%
Ensuring a reliable & continuous water supply	61%	64%	59%	100%	63%	60%	59%	64%	58%	63%	58%	63%	100%	64%	58%	81%	58%	57%	63%	61%	64%
Ensuring the safety of tap water	73%	73%	73%	100%	74%	67%	75%	71%	70%	80%	69%	75%	100%	87%	70%	80%	71%	70%	74%	73%	76%
Managing the appearance, taste & smell of tap water	66%	72%	61%	100%	77%	62%	57%	65%	65%	69%	63%	68%	100%	72%	60%	76%	79%	59%	64%	70%	63%
Managing the pressure of water in your taps & the number of unplanned interruptions	55%	62%	49%	51%	63%	52%	51%	55%	55%	56%	55%	55%	100%	57%	42%	72%	60%	54%	49%	63%	51%
Handling customers' accounts, queries, complaints & customers with special needs	53%	56%	49%	79%	57%	49%	50%	56%	48%	55%	60%	49%	100%	63%	46%	67%	59%	46%	50%	59%	38%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	62%	63%	61%	79%	61%	58%	65%	65%	60%	61%	64%	60%	100%	71%	50%	76%	58%	64%	70%	60%	44%
Avoid the risk of homes & gardens being flooded with sewerage	65%	66%	65%	100%	71%	63%	59%	71%	63%	62%	62%	66%	100%	72%	55%	86%	68%	61%	75%	59%	62%
Managing the amount of water taken from the environment to supply customers	53%	57%	49%	79%	61%	47%	48%	54%	51%	53%	52%	53%	100%	71%	37%	77%	56%	48%	49%	59%	50%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	55%	58%	52%	79%	69%	44%	50%	53%	52%	61%	54%	55%	100%	71%	48%	74%	55%	48%	52%	59%	56%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	56%	60%	53%	100%	60%	53%	52%	56%	56%	57%	50%	59%	100%	65%	50%	75%	51%	54%	56%	59%	49%
Ensuring a reliable & continuous water supply	58%	60%	56%	100%	65%	53%	54%	56%	56%	63%	53%	60%	100%	57%	60%	72%	54%	54%	55%	60%	70%
Ensuring the safety of tap water	70%	67%	73%	100%	79%	67%	62%	65%	71%	75%	60%	74%	100%	80%	70%	87%	67%	63%	70%	69%	81%
Managing the appearance, taste & smell of tap water	61%	63%	60%	79%	78%	56%	50%	57%	63%	65%	61%	61%	100%	64%	60%	76%	67%	54%	62%	61%	63%
Managing the pressure of water in your taps & the number of unplanned interruptions	52%	58%	47%	73%	56%	48%	51%	55%	48%	56%	54%	51%	100%	64%	42%	79%	55%	45%	47%	60%	44%
Handling customers' accounts, queries, complaints & customers with special needs	45%	46%	44%	79%	50%	42%	40%	46%	44%	44%	54%	40%	100%	56%	36%	72%	44%	38%	40%	52%	40%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	62%	57%	66%	79%	67%	59%	58%	63%	63%	58%	66%	60%	100%	79%	56%	80%	56%	58%	69%	61%	44%
Avoid the risk of homes & gardens being flooded with sewerage	61%	61%	61%	100%	72%	60%	49%	66%	58%	58%	54%	64%	100%	72%	54%	84%	64%	53%	68%	55%	67%
Managing the amount of water taken from the environment to supply customers	52%	55%	50%	79%	63%	51%	42%	56%	51%	50%	50%	53%	100%	79%	37%	84%	62%	40%	49%	57%	54%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	48%	52%	44%	79%	59%	44%	39%	50%	45%	50%	46%	49%	100%	56%	41%	71%	53%	39%	41%	56%	45%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	58%	63%	53%	100%	64%	55%	51%	60%	56%	57%	52%	60%	100%	65%	51%	75%	61%	52%	57%	61%	52%
Ensuring a reliable & continuous water supply	55%	59%	51%	79%	62%	51%	50%	54%	53%	59%	52%	56%	100%	57%	55%	68%	56%	49%	55%	56%	61%
Ensuring the safety of tap water	69%	69%	69%	100%	76%	67%	63%	66%	69%	75%	61%	73%	100%	80%	65%	87%	67%	64%	68%	70%	75%
Managing the appearance, taste & smell of tap water	62%	64%	60%	100%	77%	60%	47%	61%	60%	66%	59%	63%	100%	64%	65%	80%	73%	48%	58%	67%	63%
Managing the pressure of water in your taps & the number of unplanned interruptions	51%	57%	45%	73%	59%	46%	47%	52%	51%	50%	53%	50%	100%	57%	44%	76%	57%	43%	44%	57%	57%
Handling customers' accounts, queries, complaints & customers with special needs	46%	50%	42%	79%	50%	42%	43%	46%	45%	48%	54%	42%	100%	63%	36%	72%	47%	38%	39%	54%	40%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	59%	58%	60%	100%	65%	54%	54%	63%	58%	55%	61%	57%	100%	79%	45%	84%	58%	54%	64%	59%	41%
Avoid the risk of homes & gardens being flooded with sewerage	59%	60%	58%	79%	72%	59%	46%	63%	59%	55%	52%	62%	100%	72%	51%	80%	63%	51%	65%	54%	70%
Managing the amount of water taken from the environment to supply customers	49%	51%	47%	79%	56%	47%	42%	49%	51%	46%	48%	49%	100%	72%	34%	84%	53%	38%	43%	55%	51%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	46%	51%	41%	79%	54%	44%	38%	48%	42%	50%	44%	46%	100%	56%	37%	71%	52%	37%	36%	57%	45%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	1%
Ensuring a reliable & continuous water supply	2%
Ensuring the safety of tap water	3%
Managing the appearance, taste & smell of tap water	2%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%
Handling customers' accounts, queries, complaints & customers with special needs	2%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	2%
Avoid the risk of homes & gardens being flooded with sewerage	1%
Managing the amount of water taken from the environment to supply customers	2%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	2%
Reduce chemical treatments in water supply	2%
maintain the correct service level	2%
Reduce risk of floods	1%
Improve communication of water shutdown	2%
Keep reserves of water	1%
No, none	78%
No of respondents	197

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	7%	9%	5%	0%	2%	6%	13%	6%	8%	7%	9%	6%	0%	0%	4%	3%	1%	15%	9%	8%	0%
Very poor value	14%	14%	14%	20%	10%	16%	16%	17%	15%	10%	25%	9%	0%	8%	11%	13%	13%	19%	21%	10%	8%
Fairly poor value	16%	10%	22%	27%	14%	16%	18%	7%	21%	21%	16%	16%	100%	38%	18%	8%	11%	16%	16%	18%	12%
Neither poor nor good value	25%	24%	26%	53%	21%	27%	26%	19%	21%	40%	19%	28%	0%	18%	43%	35%	13%	19%	17%	33%	10%
Fairly good value	32%	36%	28%	0%	41%	35%	22%	45%	29%	18%	25%	35%	0%	29%	25%	41%	45%	26%	32%	26%	64%
Very good value	3%	4%	2%	0%	7%	0%	3%	4%	3%	3%	0%	5%	0%	7%	0%	0%	10%	2%	3%	4%	5%
Extremely good value for money	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	2%	2%	2%	0%	5%	0%	1%	3%	2%	0%	6%	0%	0%	0%	0%	0%	6%	2%	4%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	13%	16%	10%	20%	6%	16%	17%	6%	20%	12%	17%	11%	100%	0%	8%	10%	5%	24%	18%	12%	0%
Very poor value	14%	13%	15%	0%	12%	9%	22%	18%	15%	7%	22%	11%	0%	1%	13%	6%	12%	21%	19%	11%	11%
Fairly poor value	20%	12%	28%	49%	20%	19%	20%	15%	19%	29%	26%	18%	0%	51%	20%	25%	14%	15%	22%	18%	10%
Neither poor nor good value	21%	23%	20%	32%	25%	22%	16%	24%	18%	23%	18%	23%	0%	11%	32%	25%	25%	14%	16%	26%	23%
Fairly good value	28%	30%	25%	0%	28%	32%	24%	33%	24%	26%	15%	34%	0%	36%	25%	34%	33%	23%	23%	28%	51%
Very good value	3%	3%	2%	0%	6%	2%	0%	4%	2%	3%	0%	4%	0%	0%	3%	0%	10%	0%	0%	4%	5%
Extremely good value for money	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	1%	2%	0%	0%	2%	0%	1%	0%	2%	1%	3%	0%	0%	0%	0%	0%	0%	3%	2%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	20%	23%	17%	20%	12%	22%	25%	14%	27%	16%	26%	16%	100%	7%	11%	16%	12%	33%	25%	17%	8%
Very poor value	12%	11%	12%	21%	7%	8%	19%	15%	12%	7%	13%	11%	0%	8%	7%	9%	7%	19%	14%	9%	13%
Fairly poor value	20%	14%	25%	27%	23%	17%	19%	20%	17%	23%	21%	20%	0%	37%	18%	22%	20%	16%	27%	15%	14%
Neither poor nor good value	22%	22%	22%	32%	24%	24%	16%	23%	18%	25%	20%	23%	0%	11%	29%	24%	27%	16%	17%	24%	27%
Fairly good value	23%	23%	23%	0%	28%	25%	19%	25%	21%	23%	17%	26%	0%	36%	32%	29%	24%	12%	15%	28%	34%
Very good value	3%	6%	1%	0%	4%	4%	2%	2%	2%	5%	0%	5%	0%	0%	3%	0%	10%	2%	0%	5%	5%
Extremely good value for money	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dont know/cant say	1%	2%	0%	0%	2%	0%	1%	0%	2%	0%	3%	0%	0%	0%	0%	0%	0%	2%	1%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	15%	9%	0%	8%	8%	21%	11%	11%	17%	20%	9%	0%	1%	17%	14%	4%	16%	13%	11%	8%
Probably not willing to pay	24%	18%	30%	20%	17%	24%	31%	18%	26%	30%	27%	23%	0%	45%	23%	22%	19%	24%	30%	21%	12%
Probably willing to pay	51%	55%	48%	49%	50%	61%	43%	56%	52%	44%	40%	56%	100%	42%	53%	53%	48%	53%	47%	54%	68%
Definitely willing to pay	8%	6%	9%	32%	16%	4%	2%	12%	7%	2%	9%	7%	0%	0%	2%	11%	24%	3%	5%	10%	11%
Dont know/Cant say	4%	5%	4%	0%	8%	2%	4%	3%	4%	7%	5%	4%	0%	11%	5%	0%	6%	4%	5%	5%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			0					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban	Urban
Improvements not good enough	4%	0%	7%	0%	10%	6%	0%	8%	5%	0%	5%	3%	17%	8%	0%	0%	0%	4%	5%	0%	5%
Cost too much for improvement	64%	80%	50%	100%	48%	72%	65%	78%	71%	44%	62%	65%	34%	48%	80%	66%	76%	85%	40%	100%	31%
Cant afford it	30%	15%	43%	0%	32%	22%	35%	6%	24%	56%	27%	32%	49%	44%	20%	15%	24%	7%	55%	0%	41%
Dont know/Cant say	2%	5%	0%	0%	10%	0%	0%	8%	0%	0%	5%	0%	0%	0%	0%	19%	0%	4%	0%	0%	23%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	71	32	38	1	15	21	34	20	27	24	29	42	7	18	9	8	28	35	29	4	37

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	14%	12%	16%	20%	6%	18%	17%	8%	18%	16%	16%	13%	0%	10%	16%	24%	4%	16%	16%	13%	11%
Probably not willing to pay	30%	31%	29%	49%	26%	22%	40%	26%	28%	38%	38%	26%	0%	44%	28%	27%	27%	31%	38%	24%	10%
Probably willing to pay	48%	49%	46%	0%	54%	53%	39%	56%	45%	40%	35%	53%	100%	36%	52%	39%	55%	47%	38%	52%	79%
Definitely willing to pay	5%	3%	7%	32%	10%	4%	0%	9%	6%	0%	7%	4%	0%	0%	0%	11%	14%	3%	5%	7%	0%
Dont know/Cant say	4%	5%	2%	0%	4%	2%	4%	2%	3%	6%	4%	4%	0%	11%	5%	0%	0%	4%	3%	5%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			0					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban	Urban
Improvements not good enough	4%	5%	3%	0%	5%	9%	0%	0%	9%	0%	0%	6%	15%	0%	7%	9%	0%	5%	3%	0%	7%
Cost too much for improvement	62%	68%	56%	100%	49%	73%	58%	75%	73%	36%	64%	60%	26%	49%	67%	66%	74%	78%	42%	88%	38%
Cant afford it	32%	21%	41%	0%	33%	19%	42%	18%	16%	64%	32%	32%	58%	51%	19%	12%	26%	14%	52%	12%	45%
Dont know/Cant say	3%	6%	0%	0%	13%	0%	0%	7%	3%	0%	5%	2%	0%	0%	7%	14%	0%	3%	3%	0%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	86	41	45	3	19	25	38	23	36	27	33	53	8	19	13	11	34	46	33	4	37

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	26%	25%	26%	41%	11%	33%	30%	22%	27%	28%	31%	23%	0%	8%	23%	34%	23%	30%	34%	20%	17%
Probably not willing to pay	25%	27%	24%	27%	26%	16%	34%	21%	26%	29%	26%	25%	0%	45%	23%	18%	22%	26%	29%	20%	22%
Probably willing to pay	40%	38%	42%	0%	48%	47%	28%	46%	38%	34%	32%	43%	100%	36%	49%	38%	45%	33%	28%	48%	60%
Definitely willing to pay	6%	5%	6%	32%	10%	2%	4%	9%	6%	3%	8%	5%	0%	0%	1%	11%	11%	6%	6%	7%	0%
Dont know/Cant say	4%	5%	2%	0%	4%	2%	4%	2%	3%	6%	4%	4%	0%	11%	5%	0%	0%	4%	3%	5%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			0					0		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban	Urban
Improvements not good enough	5%	6%	3%	0%	10%	7%	0%	0%	11%	0%	3%	6%	15%	0%	7%	8%	2%	5%	5%	0%	12%
Cost too much for improvement	66%	73%	58%	100%	63%	76%	57%	81%	75%	37%	59%	69%	26%	49%	72%	74%	76%	79%	52%	66%	43%
Cant afford it	28%	18%	38%	0%	20%	16%	43%	14%	14%	63%	33%	25%	58%	51%	21%	8%	21%	13%	43%	34%	36%
Dont know/Cant say	2%	3%	0%	0%	7%	0%	0%	5%	0%	0%	4%	0%	0%	0%	0%	10%	0%	3%	0%	0%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	100	49	51	3	23	31	43	30	42	29	35	65	8	21	13	16	41	53	37	7	40

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	21%	27%	14%	20%	10%	16%	35%	16%	22%	25%	29%	17%	0%	16%	13%	10%	11%	35%	30%	17%	0%
Not very concerned	30%	32%	28%	21%	27%	25%	37%	35%	26%	29%	31%	29%	0%	23%	30%	34%	33%	28%	25%	32%	33%
Fairly concerned	33%	29%	36%	27%	46%	37%	15%	34%	35%	27%	23%	37%	0%	19%	40%	46%	43%	21%	31%	30%	57%
Very concerned	9%	6%	12%	32%	7%	12%	7%	12%	6%	10%	11%	8%	0%	30%	7%	6%	8%	7%	9%	10%	5%
Dont know/cant say	8%	5%	10%	0%	9%	10%	5%	3%	11%	9%	5%	8%	100%	12%	10%	4%	4%	10%	6%	10%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	196	95	101	5	61	62	67	68	78	50	62	133	1	16	45	26	37	72	84	91	18

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	3%	5%	1%	27%	4%	3%	1%	5%	3%	0%	4%	3%	0%	0%	0%	2%	14%	1%	5%	2%	0%
Ensuring a reliable & continuous water supply	6%	3%	8%	32%	11%	2%	3%	5%	8%	2%	9%	4%	0%	0%	9%	3%	10%	3%	11%	1%	7%
Ensuring the safety of tap water	14%	10%	17%	59%	18%	18%	3%	14%	18%	7%	10%	15%	0%	8%	13%	7%	26%	11%	24%	6%	11%
Managing the appearance, taste & smell of tap water	2%	3%	2%	0%	2%	6%	0%	2%	4%	1%	0%	4%	0%	0%	3%	0%	6%	2%	4%	1%	3%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	1%	2%	0%	2%	1%	1%	2%	1%	1%	0%	2%	0%	0%	2%	1%	3%	0%	0%	0%	12%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	7%	2%	11%	32%	3%	11%	4%	9%	7%	2%	6%	7%	0%	0%	8%	5%	8%	7%	12%	3%	0%
Avoid the risk of homes & gardens being flooded with sewerage	4%	1%	7%	0%	4%	8%	0%	6%	4%	0%	2%	5%	0%	0%	3%	8%	3%	5%	9%	0%	0%
Managing the amount of water taken from the environment to supply customers	2%	3%	1%	0%	6%	0%	0%	3%	2%	0%	0%	3%	0%	0%	0%	5%	6%	0%	0%	2%	5%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
No of respondents	197	95	102	5	61	63	67	68	79	50	62	134	1	16	45	26	37	73	84	92	18

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	9%	9%	9%	0%	15%	11%	2%	13%	2%	14%	7%	10%	0%	12%	11%	5%	14%	6%	13%	7%	0%
Bills show one big change in first year	5%	6%	4%	20%	2%	9%	3%	4%	6%	5%	6%	5%	0%	0%	6%	4%	4%	7%	7%	4%	0%
Bills change steadily every year	86%	85%	87%	80%	83%	80%	95%	83%	92%	80%	87%	86%	100%	88%	84%	92%	82%	87%	80%	88%	100%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	194	94	99	5	60	63	65	66	78	49	61	131	1	15	45	26	37	71	83	89	18

4 Company Plans

4.1 Bournemouth (Southern)

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£25)	Maintain current service (£32)	Maintain current service (£32)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£15)	Maintain current service (£17)	Maintain current service (£17)
	3. Ensuring the safety of tap water	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£0)	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£2)	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£2)
	4. Managing the appearance, taste and smell of tap water	80% fewer customer complaints about the appearance, taste or smell of tap water (£2)	80% fewer customer complaints about the appearance, taste or smell of tap water (£1)	80% fewer customer complaints about the appearance, taste or smell of tap water (£1)
	5. Managing the pressure of water in your taps and interruptions to supply	Reduce the number of properties at risk of low water pressure at the tap from 170 to 150 (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£3)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 10 sewage treatment works (£7)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 502 to 293. Reduce the number of properties externally flooding from sewers by 449 (£9)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£8)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£1)	101 Km of rivers can better support fish and rare wildlife1 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)	101 Km of rivers can better support fish and rare wildlife.1 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	180 Km of rivers can better support fish 135 Km of rivers and 80Km2 of coastal waters can support rare wildlife, 1 lakes are improved and can support rare wildlife. (£43)	237 Km of rivers can better support fish, 179 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lake are improved and can support rare wildlife. (£57)	569 Km of rivers can better support fish, 205 Km of rivers and 112 Km2 of coastal waters can support rare wildlife, 1 lakes are improved and can support rare wildlife. (£89)
		Overall cost, taking account of cost savings, on average bill by 2010 is £99 (excluding inflation) Overall bill by 2010 is £362 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £115 (plus inflation). Overall bill by 2010 is £379 (plus inflation).	Overall cost on average bill by 2010, taking account of cost savings, is £145 (plus inflation). Overall bill by 2010 is £409 (plus inflation)

4.2 Bournemouth (Wessex)

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£25)	Maintain current service (£32)	Maintain current service (£32)
TAP WATER	2. Ensuring a reliable and continuous water supply	Maintain current service (£15)	Maintain current service (£17)	Maintain current service (£17)
TAP WATER	3. Ensuring the safety of tap water	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£0)	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£2)	Treatment works continue to meet current and future standards and no improvements other than maintenance required.Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£2)
TAP WATER	4. Managing the appearance, taste and smell of tap water	80% fewer customer complaints about the appearance, taste or smell of tap water (£2)	80% fewer customer complaints about the appearance, taste or smell of tap water (£1)	80% fewer customer complaints about the appearance, taste or smell of tap water (£1)
TAP WATER	5. Managing the pressure of water in your taps and interruptions to supply	Reduce the number of properties at risk of low water pressure at the tap from 170 to 150 (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£5)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 12 sewage treatment works (£4)	Maintain sewerage pipes and sewage treatment works.Ensure the network can meet new demands.Reduce odour problems from 12 sewage treatment works (£4)
SEWAGE	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 813 to 100 (£5)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£5)	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity (£7)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£1)	101 Km of rivers can better support fish and rare wildlife,1 wetlands and lakes are restored and protected to support rare wildlife (Less than £1)	101 Km of rivers can better support fish and rare wildlife,1 wetlands and x lakes are restored and protected to support rare wildlife (Less than £1)
ENVIRONMENT	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	43 Km of rivers can better support fish, 11 Km of rivers can support rare wildlife. (£12)	346 Km of rivers can better support fish, 314 Km of rivers and 3 Km2 of coastal waters can support rare wildlife. (£17)	544 Km of rivers can better support fish, 314 Km of rivers and 3 Km2 of coastal waters can support rare wildlife. (£17)
		Overall cost, taking account of cost savings, on average bill by 2010 is £59 (excluding inflation). Overall bill by 2010 is £308 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £70 (plus inflation).Overall bill by 2010 is £319 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £76 (plus inflation). Overall bill by 2010 is £325 (plus inflation)

1. Key Findings

Bristol Water is a water supply only company providing water services to just over 1 million customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £29
Reference Plan A - £21
Reference Plan B - £27

☐ 74% of customers stated that they were satisfied with the services provided to them by Bristol Water. 12% indicated dissatisfaction with the service. 53% of customers said that they thought the service provided good value for money, whilst 15% said it reflected poor value for money.

☐ More than 85% of customers thought it important to maintain all services. This proportion dropped to 72% for the maintenance of 'handling customer accounts, queries, complaints and customers with special needs'. When considering improvements, customers regarded it most important to introduce improvements to 'managing the amount of water taken from the environment to supply customers' (85%) and 'managing the effects of water company activities on the water quality of rivers, wetlands and coastal waters' (83%) by 2010. Least importance was attached to improvements to 'handling customer accounts, queries, complaints and customers with special needs' (64%).

☐ Customer approval of proposals in all three company plans (each of which proposed a combination of maintained and improved services) was high. Across all three plans the three proposed outputs customers most wanted to see, were, firstly 'ensuring the safety of tap water' (73%), secondly 'managing the effects of water company activities on the water quality of rivers, wetlands and coastal waters' (69%-70%) and thirdly, 'managing the appearance, taste and smell of tap water' (68%-69%). 'Handling customers accounts, queries, complaints and customers with special needs' was ranked as the lowest priority within each plan, with customer support ranging from 53% for the Company Preferred Plan to 55% for Reference Plan A and B.

☐ 48% of customers indicated that there were no service areas which require further improvement than that proposed in the plans. 19% of customers would like to see further improvements to 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' 17% would like to see more improvements to 'manage the appearance, taste and smell of tap water' and 14% improvements to 'ensuring the safety of tap water'.

☐ There were marginal differences in customers assessments of the three plans in terms of value for money. 61% considered Reference Plan A good value for money, and this proportion was 59% for the Company Preferred Plan and 57% for Reference Plan B. 22% of customers said that Reference Plan B was poor value for money, and this proportion was 19% for Reference Plan A and 18% for the Company Preferred Plan.

☐ Customers willingness to pay for the three plans was high. This proportion was 70% for the Company Preferred Plan (45% probably willing, 25% definitely willing), 73% for Reference Plan B (48% probably willing, 25% definitely willing) and climbed to 75% for Reference Plan A (52% probably willing, 23% definitely willing). The proportion of customers indicating that they were 'not willing to pay' was 19% and 20% respectively for Reference Plan A (13% probably not willing, 6% definitely not willing) and Reference Plan B (12% probably not willing, 8% definitely not willing) and 24% for the Company Preferred Plan (16% probably not willing, 8% definitely not willing).

☐ The main reason customers who were definitely or probably not willing to pay for the improvements was that they couldn't afford them. Overall, between 44% and 50% of all Bristol Water customers indicated that they could not afford the bill increases set out in the proposed company plans (46% for Reference Plan A, 50% for Reference Plan B and 44% for the Company Preferred Plan) .

☐ 56% of customers stated that they would not be concerned if some improvements had to be delayed until after 2010, and 39% stated that they would be. Of those that expressed concern for delays this concern was greatest for delays to 'ensuring the safety of tap water' (20%) and 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' (10%). 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 79% of Bristol Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £4-£5/annum), 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters' (£12-£17/annum) and 'managing the appearance, taste and smell of tap water' (less than £1/annum).

2. Introduction

The attitudes and preferences of Bristol Water customers, reported in section 3, are based on a sample of 192 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in fifteen years
	3. Ensuring the safety of tap water	99.89% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 2,337 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	216 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.5% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	840 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	2 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	90% of rivers are of good, 6% fair and 4% poor quality.100% of designated bathing waters meet minimum standards and 65% meet higher standards.72% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £243 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	1%	1%	13%	1%	0%	0%	2%	0%	2%	2%	1%	0%	0%	0%	0%	3%	2%	0%	0%	2%
Very dissatisfied	4%	3%	5%	0%	3%	7%	2%	5%	6%	0%	4%	4%	0%	0%	3%	0%	5%	7%	0%	2%	5%
Fairly dissatisfied	7%	8%	6%	11%	9%	4%	5%	7%	7%	7%	6%	8%	0%	0%	0%	3%	5%	15%	4%	9%	7%
Neither satisfied nor dissatisfied	11%	11%	12%	0%	9%	13%	16%	13%	10%	11%	8%	12%	15%	13%	13%	7%	3%	17%	4%	12%	12%
Fairly satisfied	37%	41%	34%	42%	45%	30%	30%	37%	43%	30%	37%	37%	32%	47%	33%	25%	43%	36%	39%	41%	36%
Very satisfied	26%	24%	27%	34%	23%	29%	28%	26%	27%	22%	38%	22%	0%	24%	32%	45%	22%	19%	36%	30%	23%
Extremely satisfied	11%	12%	9%	0%	8%	13%	16%	7%	6%	23%	4%	14%	0%	13%	20%	20%	13%	1%	12%	5%	13%
Dont know/cant say	3%	0%	6%	0%	2%	4%	2%	5%	1%	4%	0%	2%	53%	4%	0%	0%	7%	3%	4%	2%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	0%	3%	13%	0%	2%	2%	2%	0%	4%	2%	2%	0%	0%	0%	0%	3%	3%	0%	0%	3%
Very poor value	2%	3%	2%	0%	2%	4%	2%	3%	3%	0%	2%	3%	0%	7%	0%	0%	5%	1%	0%	4%	2%
Fairly poor value	11%	10%	12%	11%	10%	13%	12%	10%	15%	7%	9%	12%	17%	21%	13%	6%	12%	8%	13%	2%	14%
Neither poor nor good value	20%	25%	16%	11%	17%	19%	29%	26%	21%	11%	20%	20%	15%	9%	14%	26%	14%	28%	20%	9%	23%
Fairly good value	39%	40%	38%	22%	45%	41%	31%	43%	39%	35%	48%	36%	14%	21%	47%	38%	49%	37%	37%	62%	32%
Very good value	10%	10%	11%	19%	11%	6%	12%	8%	10%	13%	10%	11%	0%	11%	12%	18%	7%	9%	16%	8%	10%
Extremely good value	4%	2%	5%	0%	3%	6%	2%	0%	3%	9%	1%	5%	0%	9%	5%	4%	6%	0%	0%	0%	6%
Dont know/cant say	11%	10%	13%	25%	12%	8%	9%	8%	8%	21%	7%	12%	53%	22%	9%	9%	4%	14%	14%	15%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	95%	95%	94%	100%	95%	95%	92%	97%	95%	91%	98%	94%	82%	90%	94%	100%	97%	93%	100%	97%	93%
Ensuring a reliable & continuous water supply	97%	97%	96%	100%	96%	98%	95%	98%	99%	91%	97%	98%	66%	90%	97%	100%	98%	97%	100%	97%	96%
Ensuring the safety of tap water	98%	98%	98%	100%	99%	100%	93%	100%	99%	94%	100%	98%	82%	96%	100%	100%	100%	96%	100%	97%	98%
Managing the appearance, taste & smell of tap water	91%	92%	91%	100%	91%	93%	87%	90%	98%	84%	100%	89%	65%	91%	85%	86%	92%	96%	100%	97%	88%
Managing the pressure of water in your taps & the number of unplanned interruptions	85%	88%	81%	87%	82%	85%	90%	85%	89%	79%	87%	86%	49%	86%	79%	84%	81%	90%	96%	90%	81%
Handling customers' accounts, queries, complaints & customers with special needs	72%	73%	70%	87%	71%	63%	78%	73%	65%	80%	71%	72%	66%	84%	76%	60%	64%	74%	66%	62%	76%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	94%	95%	92%	100%	91%	96%	95%	93%	95%	91%	98%	93%	66%	96%	93%	91%	93%	94%	100%	97%	91%
Avoid the risk of homes & gardens being flooded with sewerage	92%	91%	93%	100%	94%	87%	93%	95%	93%	88%	100%	90%	82%	90%	93%	84%	95%	94%	100%	95%	90%
Managing the amount of water taken from the environment to supply customers	94%	93%	95%	90%	95%	93%	93%	98%	94%	88%	95%	94%	82%	90%	95%	93%	98%	93%	95%	97%	93%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	95%	98%	93%	100%	95%	96%	95%	98%	94%	94%	97%	96%	82%	96%	100%	93%	96%	94%	95%	97%	95%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	75%	78%	72%	89%	78%	72%	67%	82%	77%	63%	89%	70%	66%	72%	60%	49%	76%	91%	90%	95%	65%
Ensuring a reliable & continuous water supply	77%	79%	76%	89%	78%	71%	78%	82%	82%	64%	83%	76%	66%	70%	70%	51%	73%	95%	90%	95%	68%
Ensuring the safety of tap water	79%	76%	81%	80%	81%	79%	72%	80%	84%	69%	91%	73%	82%	76%	69%	47%	79%	95%	90%	95%	71%
Managing the appearance, taste & smell of tap water	82%	82%	82%	89%	84%	81%	76%	86%	83%	76%	91%	79%	65%	79%	75%	51%	84%	94%	90%	95%	76%
Managing the pressure of water in your taps & the number of unplanned interruptions	70%	69%	70%	80%	73%	63%	66%	75%	74%	57%	83%	65%	49%	65%	59%	39%	65%	90%	85%	90%	60%
Handling customers' accounts, queries, complaints & customers with special needs	64%	64%	63%	80%	67%	55%	62%	67%	65%	58%	80%	57%	66%	68%	44%	32%	54%	87%	71%	78%	56%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	80%	83%	76%	89%	80%	75%	80%	85%	82%	69%	89%	76%	66%	76%	70%	60%	77%	94%	90%	95%	72%
Avoid the risk of homes & gardens being flooded with sewerage	81%	78%	83%	89%	82%	76%	80%	80%	85%	75%	94%	76%	66%	78%	69%	67%	79%	93%	90%	93%	74%
Managing the amount of water taken from the environment to supply customers	85%	84%	85%	80%	90%	78%	82%	90%	89%	71%	88%	83%	82%	78%	66%	71%	91%	95%	95%	95%	79%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	83%	86%	80%	80%	87%	79%	77%	92%	84%	70%	90%	80%	82%	76%	76%	64%	85%	93%	90%	95%	77%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	62%	65%	59%	51%	68%	65%	46%	56%	62%	70%	65%	62%	35%	62%	74%	67%	68%	52%	30%	56%	69%
Ensuring a reliable & continuous water supply	67%	70%	64%	75%	70%	73%	49%	58%	68%	77%	74%	66%	35%	66%	82%	67%	67%	61%	34%	66%	72%
Ensuring the safety of tap water	73%	71%	74%	65%	83%	72%	51%	67%	74%	77%	76%	71%	82%	62%	74%	75%	81%	70%	49%	67%	78%
Managing the appearance, taste & smell of tap water	69%	69%	68%	75%	70%	78%	51%	59%	72%	77%	79%	66%	35%	62%	81%	68%	66%	68%	54%	69%	71%
Managing the pressure of water in your taps & the number of unplanned interruptions	60%	63%	57%	51%	63%	64%	46%	49%	62%	70%	67%	58%	35%	62%	66%	71%	53%	56%	44%	56%	63%
Handling customers' accounts, queries, complaints & customers with special needs	53%	54%	52%	51%	56%	54%	43%	42%	54%	65%	61%	50%	35%	57%	62%	55%	49%	49%	30%	52%	56%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	60%	62%	59%	51%	63%	69%	45%	54%	63%	65%	68%	59%	35%	57%	62%	64%	62%	59%	40%	58%	64%
Avoid the risk of homes & gardens being flooded with sewerage	60%	60%	59%	65%	64%	61%	44%	52%	59%	70%	76%	54%	35%	57%	59%	60%	57%	62%	35%	64%	62%
Managing the amount of water taken from the environment to supply customers	63%	62%	63%	62%	66%	60%	56%	57%	63%	69%	67%	61%	68%	69%	65%	66%	60%	59%	35%	54%	70%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	69%	73%	66%	73%	77%	66%	53%	75%	67%	65%	72%	68%	68%	61%	72%	76%	73%	67%	65%	59%	74%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	63%	65%	60%	51%	69%	65%	46%	56%	64%	70%	68%	62%	35%	62%	74%	67%	65%	55%	19%	61%	70%
Ensuring a reliable & continuous water supply	67%	68%	66%	75%	69%	77%	47%	56%	70%	77%	78%	64%	35%	66%	82%	67%	64%	63%	24%	71%	72%
Ensuring the safety of tap water	73%	71%	75%	75%	80%	74%	54%	66%	75%	79%	80%	71%	65%	66%	78%	80%	75%	70%	38%	67%	81%
Managing the appearance, taste & smell of tap water	69%	67%	70%	75%	70%	74%	56%	57%	72%	79%	78%	66%	35%	66%	84%	72%	61%	67%	39%	69%	73%
Managing the pressure of water in your taps & the number of unplanned interruptions	60%	61%	59%	51%	63%	62%	50%	50%	62%	70%	67%	58%	35%	66%	69%	67%	50%	58%	33%	59%	65%
Handling customers' accounts, queries, complaints & customers with special needs	55%	55%	56%	51%	59%	56%	46%	42%	58%	70%	65%	52%	35%	66%	65%	55%	48%	52%	19%	57%	60%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	62%	63%	61%	51%	64%	71%	48%	54%	65%	68%	72%	59%	35%	62%	65%	64%	59%	62%	35%	61%	66%
Avoid the risk of homes & gardens being flooded with sewerage	60%	59%	62%	65%	65%	63%	44%	49%	62%	72%	74%	56%	35%	62%	62%	60%	54%	63%	19%	64%	65%
Managing the amount of water taken from the environment to supply customers	65%	61%	69%	62%	70%	63%	56%	58%	67%	72%	70%	63%	68%	74%	65%	70%	62%	62%	24%	59%	74%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	70%	70%	70%	73%	75%	70%	56%	71%	71%	68%	70%	70%	68%	66%	75%	79%	67%	68%	59%	59%	76%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	62%	64%	60%	51%	66%	65%	50%	52%	62%	74%	68%	61%	35%	63%	74%	67%	65%	53%	29%	59%	68%
Ensuring a reliable & continuous water supply	68%	69%	67%	75%	68%	77%	52%	56%	70%	81%	78%	66%	35%	67%	82%	67%	69%	62%	38%	69%	72%
Ensuring the safety of tap water	73%	71%	76%	75%	81%	74%	53%	67%	72%	84%	82%	70%	65%	67%	78%	80%	78%	69%	43%	68%	80%
Managing the appearance, taste & smell of tap water	68%	67%	69%	75%	68%	74%	57%	54%	72%	81%	80%	65%	35%	63%	81%	72%	61%	68%	49%	70%	71%
Managing the pressure of water in your taps & the number of unplanned interruptions	59%	62%	57%	51%	61%	62%	52%	44%	62%	74%	67%	57%	35%	67%	66%	70%	48%	56%	43%	57%	62%
Handling customers' accounts, queries, complaints & customers with special needs	55%	55%	55%	51%	57%	56%	47%	37%	58%	74%	65%	52%	35%	67%	62%	59%	48%	51%	29%	55%	59%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	63%	63%	64%	51%	65%	71%	51%	54%	66%	72%	76%	59%	35%	63%	65%	67%	62%	62%	39%	64%	66%
Avoid the risk of homes & gardens being flooded with sewerage	60%	57%	62%	65%	63%	63%	45%	44%	62%	77%	74%	55%	35%	63%	62%	64%	54%	60%	29%	62%	63%
Managing the amount of water taken from the environment to supply customers	64%	63%	66%	73%	67%	63%	57%	53%	68%	74%	68%	63%	68%	71%	69%	73%	60%	60%	29%	57%	73%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	69%	68%	71%	62%	74%	72%	57%	66%	71%	72%	72%	68%	68%	67%	72%	83%	65%	68%	63%	60%	74%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	4%
Ensuring a reliable & continuous water supply	6%
Ensuring the safety of tap water	14%
Managing the appearance, taste & smell of tap water	17%
Managing the pressure of water in your taps & the number of unplanned interruptions	7%
Handling customers' accounts, queries, complaints & customers with special needs	2%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	5%
Avoid the risk of homes & gardens being flooded with sewerage	6%
Managing the amount of water taken from the environment to supply customers	7%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	19%
Upgrade water pipes	1%
(further) reduce sewerage treatment works smells	1%
Reduce chemical treatments in water supply	1%
(further) improve cleanliness of the rivers	2%
No, none	48%
No of respondents	192

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	2%	1%	13%	1%	2%	0%	2%	1%	2%	2%	2%	0%	0%	0%	0%	3%	3%	0%	0%	3%
Very poor value	6%	10%	3%	0%	7%	6%	8%	6%	8%	4%	4%	7%	14%	7%	15%	0%	8%	4%	0%	2%	9%
Fairly poor value	10%	12%	7%	0%	12%	5%	12%	13%	5%	11%	8%	10%	17%	13%	3%	0%	7%	16%	10%	6%	11%
Neither poor nor good value	18%	15%	20%	49%	14%	19%	16%	13%	22%	18%	22%	17%	0%	12%	25%	16%	13%	20%	16%	18%	17%
Fairly good value	42%	42%	43%	38%	47%	36%	44%	48%	46%	30%	49%	39%	49%	39%	39%	41%	47%	42%	44%	62%	35%
Very good value	14%	9%	19%	0%	13%	24%	7%	11%	14%	18%	11%	16%	0%	21%	7%	26%	16%	8%	16%	13%	15%
Extremely good value	3%	5%	1%	0%	1%	5%	5%	2%	1%	7%	2%	3%	0%	4%	4%	8%	3%	0%	0%	0%	4%
Dont know/cant say	6%	5%	6%	0%	5%	4%	8%	5%	4%	9%	2%	6%	19%	4%	7%	8%	3%	6%	14%	0%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	2%	1%	13%	1%	2%	0%	2%	1%	2%	2%	2%	0%	0%	0%	0%	3%	3%	0%	0%	3%
Very poor value	7%	13%	2%	0%	9%	3%	8%	7%	8%	5%	4%	8%	14%	4%	15%	0%	8%	7%	6%	0%	10%
Fairly poor value	10%	9%	11%	0%	12%	5%	17%	8%	6%	20%	6%	12%	16%	25%	14%	0%	5%	11%	0%	10%	12%
Neither poor nor good value	14%	12%	17%	49%	14%	7%	13%	11%	16%	16%	22%	12%	0%	7%	15%	10%	14%	19%	14%	13%	14%
Fairly good value	39%	39%	38%	30%	35%	54%	33%	41%	43%	30%	42%	38%	33%	34%	31%	57%	33%	40%	33%	52%	34%
Very good value	17%	15%	19%	0%	20%	14%	18%	21%	14%	16%	18%	17%	17%	17%	20%	8%	24%	15%	22%	23%	15%
Extremely good value	5%	4%	7%	8%	4%	8%	5%	2%	8%	6%	4%	6%	0%	8%	3%	12%	9%	1%	0%	2%	8%
Dont know/cant say	5%	6%	5%	0%	5%	6%	5%	8%	4%	4%	2%	6%	19%	4%	3%	13%	5%	4%	25%	0%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	2%	2%	1%	13%	1%	2%	0%	2%	1%	2%	2%	2%	0%	0%	0%	0%	3%	3%	0%	0%	3%
Very poor value	6%	9%	4%	0%	10%	3%	5%	7%	7%	5%	4%	7%	14%	7%	19%	0%	8%	3%	6%	2%	8%
Fairly poor value	14%	13%	14%	0%	14%	11%	21%	10%	9%	24%	12%	15%	0%	25%	11%	12%	9%	14%	4%	13%	16%
Neither poor nor good value	16%	17%	14%	49%	13%	17%	13%	20%	16%	10%	22%	13%	16%	10%	6%	10%	19%	22%	26%	13%	14%
Fairly good value	39%	40%	38%	38%	38%	38%	41%	36%	45%	34%	38%	38%	51%	39%	43%	38%	36%	39%	28%	47%	37%
Very good value	14%	11%	18%	0%	17%	13%	14%	17%	14%	11%	17%	14%	0%	12%	15%	16%	13%	15%	16%	23%	12%
Extremely good value	4%	2%	5%	0%	1%	10%	2%	0%	5%	7%	2%	4%	0%	4%	3%	10%	6%	0%	0%	0%	5%
Dont know/cant say	6%	6%	7%	0%	7%	6%	2%	8%	4%	7%	2%	7%	19%	4%	3%	13%	7%	5%	20%	2%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	8%	8%	8%	13%	9%	4%	10%	6%	7%	11%	5%	8%	32%	8%	16%	0%	7%	8%	11%	0%	11%
Probably not willing to pay	16%	16%	16%	13%	15%	19%	15%	19%	8%	23%	16%	16%	16%	21%	17%	16%	19%	11%	0%	13%	20%
Probably willing to pay	45%	47%	44%	35%	41%	50%	52%	44%	45%	48%	50%	45%	18%	45%	48%	38%	43%	48%	65%	44%	41%
Definitely willing to pay	25%	22%	29%	18%	31%	22%	21%	26%	32%	15%	28%	25%	0%	26%	13%	38%	30%	23%	16%	43%	22%
Dont know/Cant say	6%	8%	4%	21%	5%	6%	2%	5%	8%	2%	2%	6%	35%	0%	6%	8%	0%	10%	9%	0%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	7%	4%	9%	0%	4%	11%	9%	6%	8%	7%	0%	7%	30%	0%	0%	44%	8%	7%	0%	0%	8%
Cost too much for improvements	39%	57%	23%	50%	54%	39%	9%	66%	41%	14%	52%	31%	70%	25%	14%	0%	76%	41%	56%	57%	35%
Cant afford it	44%	33%	55%	0%	31%	42%	83%	21%	44%	65%	26%	55%	0%	75%	86%	26%	7%	33%	44%	20%	48%
Dont know/Cant say	10%	6%	13%	50%	11%	8%	0%	7%	8%	14%	23%	6%	0%	0%	0%	31%	9%	19%	0%	23%	8%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	44	21	23	2	20	11	11	15	11	18	11	30	3	7	10	3	12	13	2	6	37

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	6%	5%	6%	0%	9%	2%	5%	6%	6%	4%	2%	6%	32%	8%	14%	0%	7%	3%	11%	0%	7%
Probably not willing to pay	13%	14%	13%	13%	11%	15%	18%	11%	8%	25%	14%	14%	0%	21%	22%	5%	12%	11%	0%	13%	16%
Probably willing to pay	52%	50%	53%	44%	49%	51%	60%	53%	51%	50%	50%	53%	34%	52%	48%	55%	50%	52%	75%	42%	50%
Definitely willing to pay	23%	22%	24%	8%	26%	27%	18%	23%	29%	16%	30%	21%	15%	19%	13%	32%	28%	23%	0%	45%	20%
Dont know/Cant say	6%	8%	4%	34%	5%	6%	0%	7%	6%	5%	4%	6%	19%	0%	3%	8%	3%	11%	15%	0%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	6%	13%	0%	0%	13%	0%	0%	20%	0%	0%	0%	9%	0%	0%	0%	0%	14%	13%	56%	0%	4%
Cost too much for improvements	43%	60%	28%	100%	46%	43%	31%	62%	65%	16%	58%	35%	100%	25%	32%	0%	76%	47%	0%	57%	44%
Cant afford it	46%	20%	72%	0%	34%	57%	69%	18%	35%	75%	25%	56%	0%	75%	68%	100%	10%	26%	44%	20%	52%
Dont know/Cant say	4%	7%	0%	0%	7%	0%	0%	0%	0%	8%	17%	0%	0%	0%	0%	0%	0%	15%	0%	23%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	36	18	18	1	18	7	9	11	9	15	8	26	2	7	10	1	8	9	2	6	28

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	8%	11%	5%	0%	10%	6%	8%	8%	8%	7%	5%	9%	14%	7%	25%	0%	7%	5%	11%	3%	10%
Probably not willing to pay	12%	13%	12%	24%	9%	15%	15%	9%	7%	25%	13%	13%	0%	26%	9%	8%	12%	11%	0%	10%	15%
Probably willing to pay	48%	46%	50%	33%	47%	51%	50%	46%	50%	48%	47%	49%	34%	51%	40%	53%	46%	49%	64%	43%	45%
Definitely willing to pay	25%	23%	27%	8%	29%	22%	26%	31%	27%	16%	32%	23%	17%	16%	24%	31%	30%	25%	10%	41%	23%
Dont know/Cant say	6%	8%	5%	34%	6%	6%	0%	7%	7%	5%	4%	6%	35%	0%	3%	8%	5%	10%	15%	2%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	6%	11%	0%	0%	14%	0%	0%	20%	0%	0%	0%	8%	0%	0%	0%	0%	14%	11%	56%	0%	4%
Cost too much for improvements	40%	54%	23%	100%	43%	54%	9%	51%	69%	15%	63%	32%	100%	34%	21%	0%	76%	41%	0%	57%	40%
Cant afford it	50%	29%	77%	0%	36%	46%	91%	29%	31%	77%	22%	60%	0%	66%	79%	100%	10%	34%	44%	20%	56%
Dont know/Cant say	3%	6%	0%	0%	8%	0%	0%	0%	0%	8%	15%	0%	0%	0%	0%	0%	0%	13%	0%	23%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	38	21	17	2	17	9	10	11	10	17	9	29	1	8	10	2	8	10	2	6	31

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	16%	13%	18%	14%	13%	21%	17%	6%	20%	22%	11%	18%	18%	17%	20%	15%	18%	13%	0%	11%	18%
Not very concerned	40%	40%	40%	64%	31%	42%	52%	37%	39%	45%	43%	40%	15%	52%	50%	46%	24%	40%	50%	50%	35%
Fairly concerned	26%	30%	21%	0%	32%	26%	19%	31%	29%	12%	26%	25%	30%	14%	17%	25%	37%	26%	30%	20%	28%
Very concerned	13%	12%	15%	22%	17%	10%	5%	16%	12%	12%	11%	13%	37%	9%	8%	14%	19%	13%	14%	9%	15%
Dont know/cant say	5%	5%	6%	0%	6%	2%	8%	8%	0%	9%	8%	4%	0%	9%	5%	0%	3%	8%	6%	10%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	3%	3%	4%	13%	5%	1%	0%	3%	2%	5%	6%	2%	0%	0%	0%	13%	4%	2%	0%	0%	5%
Ensuring a reliable & continuous water supply	7%	8%	5%	8%	6%	12%	2%	7%	8%	5%	7%	7%	0%	6%	6%	11%	10%	4%	0%	4%	9%
Ensuring the safety of tap water	20%	20%	20%	22%	26%	17%	12%	23%	22%	15%	17%	22%	16%	14%	18%	23%	29%	17%	9%	9%	27%
Managing the appearance, taste & smell of tap water	4%	5%	3%	0%	5%	5%	2%	3%	8%	0%	6%	3%	14%	3%	0%	3%	7%	5%	8%	7%	3%
Managing the pressure of water in your taps & the number of unplanned interruptions	3%	3%	3%	13%	4%	2%	0%	3%	1%	5%	2%	3%	0%	9%	0%	0%	5%	2%	0%	0%	4%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	2%	0%	4%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	9%	11%	6%	0%	12%	10%	3%	13%	10%	0%	8%	9%	0%	3%	3%	11%	17%	6%	10%	6%	10%
Avoid the risk of homes & gardens being flooded with sewerage	4%	3%	4%	0%	5%	1%	5%	3%	3%	5%	5%	3%	0%	5%	4%	3%	0%	6%	0%	6%	3%
Managing the amount of water taken from the environment to supply customers	4%	7%	2%	0%	5%	5%	2%	2%	7%	3%	2%	5%	0%	9%	3%	8%	0%	4%	5%	2%	5%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	10%	8%	11%	8%	14%	5%	7%	16%	10%	0%	7%	9%	33%	4%	15%	5%	17%	7%	15%	5%	11%
No of respondents	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	12%	16%	8%	11%	11%	12%	14%	12%	14%	9%	9%	13%	17%	19%	14%	11%	15%	7%	16%	5%	13%
Bills show one big change in first year	9%	10%	8%	18%	8%	7%	13%	7%	11%	9%	7%	10%	0%	10%	6%	18%	8%	7%	6%	6%	11%
Bills change steadily every year	79%	74%	84%	71%	81%	81%	73%	81%	75%	82%	84%	77%	83%	71%	80%	71%	77%	86%	78%	89%	76%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	192	95	97	9	91	49	41	67	74	52	55	131	6	25	28	25	44	70	20	43	125

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£5)	Maintain current service (£4)	Maintain current service (£4)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£3)	Maintain current service (£3)	Maintain current service (£3)
	3. Ensuring the safety of tap water	Meet current and future standards at 2 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required, 13,900 of water company lead pipes replaced to meet new lead standard (£5)	Meet current and future standards at 2 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required, 13,900 of water company lead pipes replaced to meet new lead standard (£4)	Meet current and future standards at 2 treatment works. Mains continue to provide water meeting current and future standards and no further improvements other than maintenance required, 13,900 of water company lead pipes replaced to meet new lead standard (£4)
	4. Managing the appearance, taste and smell of tap water	30% fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)	30% fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)	30% fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)
	5. Managing the pressure of water in your taps and interruptions to supply	Reduce the number of properties at risk of low water pressure at the tap from 175 to 120 (Less than £1)	Reduce the number of properties at risk of low water pressure at the tap from 175 to 120 (Less than £1)	Reduce the number of properties at risk of low water pressure at the tap from 175 to 120 (Less than £1)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from x sewage treatment works (£5)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from x sewage treatment works (£4)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from x sewage treatment works (£4)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 813 to 100 (£5)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£5)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£7)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	43 Km of rivers can better support fish, 11 Km of rivers can support rare wildlife. (£12)	346 Km of rivers can better support fish, 314 Km of rivers and 3 Km2 of coastal waters can support rare wildlife. (£17)	346 Km of rivers can better support fish, 314 Km of rivers and 3 Km2 of coastal waters can support rare wildlife. (£17)
		Overall cost, taking account of cost savings, on average bill by 2010 is £29 (excluding inflation). Overall bill by 2010 is £277 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £21 (plus inflation). Overall bill by 2010 is £269 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £27 (plus inflation). Overall bill by 2010 is £275 (plus inflation)

1. Key Findings

Yorkshire Water is a water and sewerage company providing 4.6 million customers with water and 4.8 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £41
Reference Plan A - £38
Reference Plan B - £81

☐ 83% of customers said that they were satisfied with the service provided by Yorkshire Water, whilst 12% stated they were dissatisfied. 63% of customers indicated that the service was good value for money and 14% stated that it was poor value for money.

☐ Customer approval was marginally greater for the Company Preferred Plan and Reference Plan A than Reference Plan B. Across the three plans,(each of which proposed a combination of maintained and improved services), the proposed output customers most wanted to see was 'ensuring the safety of tap water' (68%-71%). Within the Company Preferred Plan and Reference Plan A, the second priority was to 'maintain sewers and sewage works, ensuring the network can meet new demands and controlling smells from sewage works' (64%-66), followed by 'ensuring reliable and continuous water supply' (62%-64%) and 'managing the appearance, taste and smell of tap water' (both 63%). 'Handling customers accounts, queries, complaints and customers with special needs' was ranked lowest priority in these two plans. Within Reference Plan B, second and third priorities were 'managing the appearance taste and smell of tap water (60%) and 'avoiding the risk of homes and gardens flooding with sewerage (59%). The element with the lowest ranking (45%) in this set of proposals was 'managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters'.

☐ 62% of customers do not identify areas for improvements above and beyond those proposed in the plans. Where some customers did, they were most likely to identify 'ensuring the safety of tap water' (13%) and 'managing the appearance, taste and smell of tap water' (10%).

☐ Reference Plan A was considered best value for money, with 62% of customers considering the proposals good value for money, against 22% considering it poor value for money. The Company Preferred Plan was identified as second best value for money (56% reported it as good value for money against 24% suggesting it was poor value for money). Amongst Yorkshire water customers Reference Plan B clearly represented the poorest value for money. 47% of customers regarded this plan poor value for money, considerably more than the 33% who regarded the Plan good value for money.

☐ Customers were most and equally (68% for both) willing to pay for the Company Preferred Plan (43% probably willing, 25% definitely willing) and Reference Plan A (48% probably willing, 20% definitely willing). They were significantly less willing (44%) to pay for Reference Plan B (32% probably willing, 12% definitely willing). The proportion of customers indicating that they were 'not willing to pay' was 27% and 29% respectively for the Company Preferred Plan (17% probably not willing, 10% definitely not willing) and Reference Plan A (17% probably not willing, 12% definitely not willing) and significantly higher (53%) for Reference Plan B (28% probably not willing, 25% definitely not willing).

☐ Of those customers who indicated they were definitely or probably not willing to pay, 52% said that this was because the 'cost is too much for the improvements' in the Company Preferred Plan and Reference Plan A. 59% gave this as a reason for Reference Plan B. Between 12% and 19% of all Yorkshire water customers indicated that they could not afford the proposed bill increases set out in the plans (12% for the Company Preferred Plan and Reference Plan A and 19% for Reference Plan B).

☐ 46% of customers were not concerned if some of the improvements had to be delayed until after 2010, and 42% were concerned. Where concern was expressed, it was greatest for delays to 'ensuring the safety of tap water (20%). 0% of customers were concerned about delays in improvements to 'handling customer accounts, queries, complaints and customers with special needs'.

☐ 81% of Yorkshire Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the four improvements customers most wanted to see were 'ensuring the safety of tap water' (at a cost of £11/annum), 'managing the appearance, taste and smell of tap water' (£1-£2/annum), 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£10-£13/annum) and ‘avoiding the risk of homes and gardens being flooded with sewage’ (£2/annum).

2. Introduction

The attitudes and preferences of Yorkshire Water customers, reported in section 3, are based on a sample of 356 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in twenty five years
	3. Ensuring the safety of tap water	99.89% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 19,722 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	185 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 99.5% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	334 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	5 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	80% of rivers are of good, 10% fair and 10% poor quality.100% of designated bathing waters meet minimum standards and 57% meet higher standards.52% of rivers may be at risk from weed growth that can adversely affect wildlife

Average bill in this area = £230 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	1%	1%	0%	0%	1%	2%	0%	1%	1%	0%	1%	0%	2%	0%	0%	0%	1%	1%	1%	1%
Very dissatisfied	3%	4%	3%	6%	1%	4%	5%	4%	4%	2%	4%	3%	15%	3%	2%	2%	4%	3%	0%	3%	8%
Fairly dissatisfied	8%	9%	7%	3%	6%	11%	5%	10%	10%	4%	1%	9%	0%	7%	0%	13%	7%	9%	9%	8%	6%
Neither satisfied nor dissatisfied	5%	4%	7%	8%	8%	4%	2%	6%	5%	4%	7%	5%	7%	7%	2%	2%	11%	3%	7%	6%	1%
Fairly satisfied	35%	43%	27%	29%	42%	30%	35%	32%	32%	40%	30%	35%	48%	39%	42%	32%	38%	30%	37%	37%	29%
Very satisfied	37%	32%	41%	35%	27%	42%	40%	37%	36%	37%	52%	35%	16%	33%	30%	39%	24%	45%	36%	35%	41%
Extremely satisfied	11%	8%	14%	15%	17%	8%	7%	9%	11%	13%	6%	12%	0%	7%	24%	11%	16%	8%	9%	11%	13%
Dont know/cant say	1%	1%	1%	4%	0%	0%	2%	2%	1%	0%	0%	1%	14%	2%	0%	0%	0%	1%	2%	0%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	356	176	180	27	108	144	74	100	133	122	51	296	8	76	37	41	58	144	119	152	83

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	1%	1%	1%	0%	0%	2%	1%	0%	3%	0%	1%	1%	0%	1%	3%	2%	0%	0%	1%	0%	2%
Very poor value	3%	4%	3%	0%	5%	1%	5%	2%	3%	4%	0%	4%	0%	7%	4%	0%	0%	3%	2%	3%	4%
Fairly poor value	10%	10%	9%	7%	6%	13%	9%	10%	11%	8%	5%	10%	8%	14%	4%	7%	13%	9%	13%	10%	6%
Neither poor nor good value	20%	19%	21%	20%	25%	23%	8%	24%	19%	18%	21%	20%	28%	14%	16%	27%	26%	19%	13%	22%	26%
Fairly good value	36%	42%	31%	20%	42%	33%	39%	29%	37%	41%	30%	37%	26%	35%	38%	35%	28%	39%	39%	41%	23%
Very good value	23%	20%	25%	26%	16%	21%	33%	26%	21%	22%	39%	20%	15%	19%	27%	23%	19%	24%	24%	20%	25%
Extremely good value	4%	2%	6%	13%	2%	4%	2%	5%	3%	4%	4%	4%	0%	2%	8%	6%	6%	3%	3%	3%	8%
Dont know/cant say	4%	2%	5%	14%	4%	2%	2%	4%	4%	3%	0%	4%	23%	7%	0%	0%	8%	2%	6%	1%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	356	176	180	27	108	144	74	100	133	122	51	296	8	76	37	41	58	144	119	152	83

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	95%	94%	96%	92%	91%	98%	95%	96%	94%	94%	97%	95%	93%	94%	92%	92%	93%	98%	93%	96%	95%
Ensuring a reliable & continuous water supply	96%	95%	97%	92%	94%	97%	99%	98%	97%	94%	98%	96%	92%	94%	94%	98%	98%	96%	94%	97%	96%
Ensuring the safety of tap water	98%	97%	99%	97%	98%	99%	97%	100%	99%	96%	100%	98%	100%	98%	98%	100%	100%	97%	97%	99%	99%
Managing the appearance, taste & smell of tap water	95%	95%	95%	95%	94%	95%	96%	95%	97%	92%	97%	94%	100%	93%	96%	100%	98%	93%	94%	97%	93%
Managing the pressure of water in your taps & the number of unplanned interruptions	91%	91%	90%	81%	90%	92%	92%	89%	92%	90%	95%	90%	84%	87%	96%	94%	89%	90%	89%	94%	87%
Handling customers' accounts, queries, complaints & customers with special needs	88%	89%	87%	97%	88%	87%	84%	85%	91%	86%	94%	87%	100%	85%	88%	94%	93%	86%	92%	89%	80%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	95%	94%	96%	90%	94%	96%	97%	99%	95%	93%	97%	95%	100%	95%	95%	98%	98%	94%	96%	95%	95%
Avoid the risk of homes & gardens being flooded with sewerage	97%	97%	97%	95%	96%	97%	99%	99%	97%	96%	100%	96%	100%	98%	98%	98%	100%	95%	98%	96%	98%
Managing the amount of water taken from the environment to supply customers	94%	92%	95%	88%	92%	96%	93%	99%	91%	92%	99%	93%	77%	91%	87%	98%	97%	95%	95%	93%	92%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	89%	91%	87%	85%	85%	92%	90%	92%	88%	87%	93%	88%	93%	83%	86%	92%	95%	89%	90%	89%	87%
No of respondents	353	173	180	27	109	144	72	100	132	122	51	294	8	76	37	41	58	142	118	151	83

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	68%	69%	67%	71%	61%	73%	66%	72%	71%	61%	78%	66%	69%	49%	58%	81%	54%	83%	83%	57%	67%
Ensuring a reliable & continuous water supply	69%	70%	68%	67%	63%	72%	71%	65%	74%	67%	75%	69%	42%	56%	60%	71%	53%	84%	81%	62%	66%
Ensuring the safety of tap water	77%	75%	79%	85%	75%	80%	70%	77%	82%	71%	88%	75%	84%	63%	68%	85%	64%	89%	89%	69%	75%
Managing the appearance, taste & smell of tap water	81%	83%	79%	89%	79%	80%	83%	74%	87%	80%	90%	79%	91%	71%	91%	91%	62%	87%	91%	77%	74%
Managing the pressure of water in your taps & the number of unplanned interruptions	66%	65%	67%	62%	62%	71%	64%	69%	71%	59%	69%	66%	49%	51%	57%	73%	51%	81%	84%	55%	62%
Handling customers' accounts, queries, complaints & customers with special needs	65%	64%	65%	73%	63%	65%	61%	67%	69%	57%	66%	64%	77%	49%	66%	71%	54%	74%	84%	51%	61%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	72%	70%	73%	75%	67%	77%	69%	76%	76%	64%	77%	70%	86%	56%	70%	80%	58%	83%	87%	64%	64%
Avoid the risk of homes & gardens being flooded with sewerage	70%	69%	72%	67%	67%	72%	73%	69%	75%	67%	76%	70%	49%	56%	67%	61%	65%	84%	89%	57%	67%
Managing the amount of water taken from the environment to supply customers	69%	68%	70%	71%	60%	76%	69%	71%	74%	63%	79%	68%	62%	51%	64%	77%	56%	83%	84%	61%	63%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	68%	69%	67%	71%	58%	73%	71%	67%	72%	64%	72%	67%	86%	54%	59%	72%	56%	81%	85%	57%	63%
No of respondents	353	173	180	27	109	144	72	100	132	122	51	294	8	76	37	41	58	142	118	151	83

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	63%	58%	67%	64%	52%	75%	54%	68%	61%	61%	80%	60%	77%	52%	71%	73%	48%	70%	56%	61%	75%
Ensuring a reliable & continuous water supply	64%	59%	70%	65%	61%	72%	53%	69%	67%	58%	79%	62%	41%	54%	70%	72%	61%	67%	57%	63%	77%
Ensuring the safety of tap water	69%	66%	72%	68%	67%	78%	54%	70%	72%	65%	73%	68%	63%	64%	70%	74%	62%	73%	62%	71%	75%
Managing the appearance, taste & smell of tap water	63%	57%	70%	73%	61%	70%	50%	69%	65%	57%	77%	61%	78%	55%	70%	67%	61%	66%	59%	59%	78%
Managing the pressure of water in your taps & the number of unplanned interruptions	59%	53%	65%	46%	54%	70%	48%	64%	60%	54%	78%	56%	27%	45%	69%	60%	52%	66%	54%	59%	65%
Handling customers' accounts, queries, complaints & customers with special needs	55%	49%	61%	55%	52%	64%	43%	59%	55%	51%	74%	52%	41%	45%	54%	57%	48%	63%	47%	55%	66%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	66%	59%	73%	60%	58%	76%	60%	71%	67%	61%	72%	66%	48%	58%	67%	60%	57%	76%	62%	63%	77%
Avoid the risk of homes & gardens being flooded with sewerage	64%	57%	70%	62%	58%	71%	57%	68%	65%	59%	69%	63%	57%	51%	73%	62%	61%	69%	59%	60%	76%
Managing the amount of water taken from the environment to supply customers	59%	54%	65%	58%	57%	69%	45%	69%	59%	51%	75%	57%	63%	42%	64%	73%	56%	65%	51%	60%	70%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	60%	53%	67%	63%	52%	74%	43%	72%	59%	52%	72%	57%	71%	46%	62%	74%	59%	63%	50%	61%	72%
No of respondents	357	176	181	27	110	144	74	102	133	122	51	297	8	76	37	41	58	145	121	152	83

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	61%	58%	64%	62%	54%	72%	49%	68%	60%	57%	80%	58%	77%	49%	64%	74%	51%	67%	55%	59%	73%
Ensuring a reliable & continuous water supply	62%	54%	69%	64%	57%	68%	55%	66%	62%	58%	79%	59%	41%	54%	58%	68%	57%	67%	57%	60%	73%
Ensuring the safety of tap water	71%	67%	75%	71%	72%	77%	57%	76%	71%	67%	73%	71%	56%	63%	66%	75%	71%	75%	65%	72%	79%
Managing the appearance, taste & smell of tap water	63%	57%	69%	74%	63%	67%	50%	66%	62%	62%	74%	61%	71%	56%	66%	62%	57%	69%	61%	58%	75%
Managing the pressure of water in your taps & the number of unplanned interruptions	57%	51%	64%	46%	53%	66%	50%	61%	57%	54%	78%	55%	27%	46%	63%	55%	50%	66%	53%	56%	66%
Handling customers' accounts, queries, complaints & customers with special needs	54%	48%	61%	55%	51%	61%	45%	58%	54%	53%	73%	52%	34%	47%	53%	54%	44%	63%	48%	53%	67%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	64%	59%	69%	68%	57%	73%	53%	71%	62%	59%	70%	63%	63%	54%	64%	64%	60%	70%	56%	61%	79%
Avoid the risk of homes & gardens being flooded with sewerage	61%	54%	68%	65%	59%	66%	52%	68%	59%	58%	70%	60%	49%	47%	71%	61%	61%	66%	56%	58%	74%
Managing the amount of water taken from the environment to supply customers	58%	54%	62%	50%	58%	67%	43%	65%	59%	51%	71%	56%	34%	44%	59%	58%	62%	63%	50%	57%	72%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	59%	54%	63%	60%	54%	70%	42%	74%	55%	50%	71%	56%	71%	47%	58%	72%	63%	59%	49%	57%	75%
No of respondents	357	176	181	27	110	144	74	102	133	122	51	297	8	76	37	41	58	145	121	152	83

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	58%	55%	60%	55%	52%	69%	43%	65%	56%	53%	77%	54%	63%	44%	62%	76%	49%	61%	52%	55%	69%
Ensuring a reliable & continuous water supply	58%	53%	63%	68%	56%	64%	44%	60%	59%	55%	74%	55%	55%	47%	60%	69%	54%	62%	50%	56%	73%
Ensuring the safety of tap water	68%	63%	72%	71%	69%	75%	49%	69%	69%	65%	73%	67%	48%	62%	73%	73%	61%	71%	64%	67%	74%
Managing the appearance, taste & smell of tap water	60%	55%	65%	73%	63%	63%	46%	61%	61%	59%	78%	57%	71%	56%	62%	62%	56%	64%	57%	55%	76%
Managing the pressure of water in your taps & the number of unplanned interruptions	54%	49%	58%	51%	49%	64%	42%	57%	54%	51%	70%	51%	55%	40%	60%	63%	45%	61%	48%	54%	63%
Handling customers' accounts, queries, complaints & customers with special needs	50%	44%	56%	50%	48%	58%	37%	51%	51%	49%	71%	47%	34%	43%	53%	56%	34%	58%	42%	50%	61%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	58%	51%	65%	55%	56%	65%	49%	58%	60%	56%	67%	57%	34%	47%	66%	63%	49%	64%	53%	57%	68%
Avoid the risk of homes & gardens being flooded with sewerage	59%	54%	64%	63%	62%	62%	47%	64%	58%	56%	70%	58%	35%	46%	75%	62%	56%	63%	54%	57%	69%
Managing the amount of water taken from the environment to supply customers	54%	51%	57%	63%	49%	64%	40%	59%	55%	50%	71%	51%	71%	47%	62%	60%	44%	59%	46%	54%	68%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	45%	41%	48%	38%	42%	52%	36%	48%	43%	44%	58%	43%	27%	38%	50%	45%	38%	50%	41%	39%	60%
No of respondents	357	176	181	27	110	144	74	102	133	122	51	297	8	76	37	41	58	145	121	152	83

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	4%
Ensuring a reliable & continuous water supply	6%
Ensuring the safety of tap water	13%
Managing the appearance, taste & smell of tap water	10%
Managing the pressure of water in your taps & the number of unplanned interruptions	5%
Handling customers' accounts, queries, complaints & customers with special needs	7%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	7%
Avoid the risk of homes & gardens being flooded with sewerage	5%
Managing the amount of water taken from the environment to supply customers	3%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%
Upgrade water pipes	1%
(further) reduce limescale in water	1%
Introduce option of having a water meter	1%
maintain the correct service level	1%
Reduce risk of floods	1%
Improve quality of pipe repair workmanship	1%
More water conservation education	1%
No, none	62%
No of respondents	356

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	5%	5%	6%	7%	4%	4%	4%	4%	6%	4%	5%	0%	6%	9%	2%	4%	5%	4%	4%	7%
Very poor value	6%	6%	6%	0%	9%	5%	5%	3%	7%	7%	11%	5%	0%	8%	0%	6%	8%	5%	10%	6%	1%
Fairly poor value	13%	11%	16%	15%	12%	14%	14%	14%	16%	10%	17%	13%	14%	13%	20%	14%	11%	12%	15%	14%	10%
Neither poor nor good value	18%	21%	14%	23%	22%	14%	16%	22%	13%	19%	10%	18%	45%	17%	7%	17%	19%	20%	14%	21%	16%
Fairly good value	34%	34%	33%	27%	29%	43%	26%	37%	32%	33%	35%	34%	18%	29%	41%	40%	28%	35%	30%	39%	30%
Very good value	20%	19%	21%	26%	16%	17%	29%	16%	22%	21%	21%	20%	22%	24%	16%	15%	25%	19%	18%	16%	30%
Extremely good value	2%	2%	3%	3%	3%	3%	0%	1%	4%	2%	2%	2%	0%	0%	7%	6%	3%	1%	4%	0%	3%
Dont know/cant say	2%	3%	2%	0%	1%	2%	6%	3%	2%	2%	0%	3%	0%	3%	0%	0%	2%	3%	5%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	355	174	181	27	108	144	74	102	132	121	51	295	8	76	37	41	58	143	120	151	83

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	5%	5%	6%	6%	3%	5%	3%	4%	7%	6%	5%	0%	7%	6%	2%	2%	5%	3%	5%	7%
Very poor value	4%	4%	5%	0%	6%	3%	6%	1%	6%	5%	6%	4%	0%	7%	3%	6%	1%	4%	5%	3%	6%
Fairly poor value	13%	12%	15%	10%	15%	13%	14%	18%	13%	10%	18%	13%	7%	15%	8%	14%	18%	12%	15%	17%	4%
Neither poor nor good value	14%	14%	14%	10%	18%	11%	16%	12%	11%	18%	9%	15%	8%	17%	14%	0%	17%	15%	15%	13%	14%
Fairly good value	43%	46%	39%	47%	40%	47%	37%	44%	43%	42%	43%	42%	63%	31%	46%	60%	33%	47%	40%	46%	41%
Very good value	16%	14%	18%	24%	10%	20%	14%	17%	17%	14%	15%	16%	22%	16%	21%	13%	23%	13%	12%	14%	23%
Extremely good value	3%	3%	3%	3%	4%	2%	2%	1%	4%	2%	3%	3%	0%	4%	3%	5%	3%	1%	4%	1%	5%
Dont know/cant say	2%	2%	2%	0%	1%	2%	5%	3%	1%	2%	0%	2%	0%	2%	0%	0%	2%	2%	5%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	356	176	181	27	110	144	74	102	132	122	51	296	8	76	37	41	58	144	120	152	83

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	14%	14%	15%	6%	18%	11%	19%	13%	13%	16%	18%	14%	0%	16%	13%	12%	13%	14%	15%	17%	8%
Very poor value	13%	11%	15%	6%	14%	14%	14%	18%	9%	14%	13%	14%	0%	13%	25%	9%	13%	12%	20%	13%	6%
Fairly poor value	20%	18%	22%	39%	24%	17%	14%	18%	24%	17%	19%	20%	23%	23%	29%	12%	26%	16%	17%	24%	17%
Neither poor nor good value	17%	19%	15%	13%	18%	19%	12%	20%	17%	15%	20%	17%	7%	16%	18%	33%	12%	15%	19%	14%	21%
Fairly good value	20%	22%	19%	24%	13%	23%	26%	16%	18%	26%	21%	19%	70%	20%	8%	23%	10%	27%	15%	22%	27%
Very good value	12%	11%	14%	12%	13%	14%	10%	12%	15%	10%	8%	14%	0%	8%	6%	8%	24%	13%	9%	10%	21%
Extremely good value	1%	2%	0%	0%	1%	1%	1%	0%	3%	0%	1%	1%	0%	2%	0%	2%	0%	1%	1%	1%	1%
Dont know/cant say	2%	3%	1%	0%	0%	2%	5%	3%	1%	2%	0%	2%	0%	2%	0%	0%	3%	2%	5%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	353	176	177	27	108	143	74	99	132	122	49	295	8	76	37	41	55	144	117	152	83

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	10%	9%	11%	6%	12%	6%	18%	5%	12%	14%	12%	10%	0%	12%	8%	9%	3%	14%	15%	8%	9%
Probably not willing to pay	17%	16%	19%	17%	20%	18%	13%	18%	16%	18%	15%	18%	23%	26%	12%	15%	16%	15%	21%	20%	7%
Probably willing to pay	43%	44%	42%	51%	43%	43%	39%	46%	46%	38%	40%	43%	63%	29%	45%	51%	44%	48%	36%	46%	50%
Definitely willing to pay	25%	28%	23%	21%	23%	28%	25%	28%	24%	24%	31%	25%	15%	31%	30%	25%	31%	19%	24%	21%	33%
Dont know/Cant say	4%	3%	4%	5%	1%	5%	4%	3%	2%	6%	2%	4%	0%	2%	4%	0%	6%	4%	4%	5%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	356	175	181	27	110	144	74	102	132	122	51	296	8	76	37	41	58	144	120	152	83

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	2%	2%	1%	0%	0%	5%	0%	0%	5%	0%	5%	1%	0%	0%	0%	10%	0%	2%	2%	2%	0%
Cost too much for improvement	52%	53%	51%	61%	67%	48%	29%	77%	60%	31%	72%	47%	100%	31%	40%	84%	71%	56%	46%	58%	48%
Cant afford it	41%	39%	43%	39%	20%	44%	71%	14%	31%	66%	9%	48%	0%	66%	42%	6%	12%	41%	47%	38%	34%
Dont know/Cant say	5%	6%	5%	0%	12%	3%	0%	9%	5%	3%	14%	4%	0%	3%	18%	0%	18%	2%	5%	2%	18%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	97	42	55	6	35	34	22	21	36	40	14	81	2	29	8	10	11	40	42	42	13

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	12%	11%	6%	12%	7%	22%	9%	11%	14%	10%	12%	0%	13%	6%	7%	3%	17%	15%	8%	13%
Probably not willing to pay	17%	15%	19%	19%	20%	15%	17%	16%	14%	22%	17%	17%	23%	28%	16%	16%	16%	13%	21%	20%	7%
Probably willing to pay	48%	51%	46%	51%	47%	53%	38%	49%	53%	42%	46%	48%	63%	30%	56%	52%	48%	54%	41%	51%	54%
Definitely willing to pay	20%	19%	20%	21%	19%	22%	17%	23%	21%	17%	25%	19%	15%	27%	21%	25%	27%	12%	20%	17%	25%
Dont know/Cant say	3%	4%	3%	3%	1%	4%	6%	3%	1%	6%	2%	4%	0%	2%	2%	0%	6%	4%	4%	4%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	356	176	181	27	110	144	74	102	132	122	51	296	8	76	37	41	58	144	120	152	83

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	3%	2%	4%	8%	2%	5%	0%	0%	7%	2%	5%	3%	0%	3%	0%	11%	0%	3%	2%	5%	0%
Cost too much for improvement	52%	52%	51%	56%	62%	48%	41%	81%	54%	34%	72%	47%	100%	33%	43%	83%	60%	57%	47%	55%	55%
Cant afford it	40%	43%	38%	35%	24%	44%	59%	5%	34%	65%	9%	46%	0%	61%	57%	6%	11%	38%	46%	38%	31%
Dont know/Cant say	5%	2%	7%	0%	12%	3%	0%	14%	6%	0%	14%	4%	0%	3%	0%	0%	29%	2%	5%	2%	14%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	99	43	56	7	35	31	26	24	33	43	14	84	2	30	8	9	11	41	41	42	16

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	25%	22%	27%	21%	26%	16%	40%	20%	21%	32%	31%	24%	8%	36%	26%	13%	18%	24%	33%	25%	12%
Probably not willing to pay	28%	29%	28%	43%	28%	30%	19%	31%	28%	26%	18%	29%	65%	22%	34%	41%	33%	24%	26%	33%	23%
Probably willing to pay	32%	36%	29%	19%	38%	35%	23%	34%	35%	28%	41%	31%	27%	24%	34%	33%	25%	39%	29%	30%	43%
Definitely willing to pay	12%	11%	13%	14%	7%	15%	14%	13%	14%	9%	10%	13%	0%	18%	4%	13%	20%	8%	9%	9%	22%
Dont know/Cant say	2%	3%	2%	3%	1%	4%	3%	1%	2%	4%	0%	3%	0%	0%	2%	0%	4%	4%	3%	4%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	357	176	181	27	110	144	74	102	133	122	51	297	8	76	37	41	58	145	121	152	83

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	2%	3%	1%	0%	1%	6%	0%	0%	6%	1%	3%	2%	0%	0%	0%	4%	3%	4%	3%	3%	0%
Cost too much for improvement	59%	63%	56%	72%	60%	61%	50%	80%	62%	43%	66%	56%	100%	45%	30%	84%	72%	64%	50%	60%	79%
Cant afford it	36%	31%	40%	28%	33%	32%	48%	17%	28%	56%	23%	39%	0%	53%	66%	11%	18%	31%	44%	35%	18%
Dont know/Cant say	2%	2%	3%	0%	5%	1%	2%	4%	4%	0%	8%	2%	0%	2%	4%	0%	6%	1%	3%	2%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	186	86	100	17	60	67	42	50	64	71	25	154	6	44	21	22	30	68	69	88	29

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	18%	17%	19%	22%	19%	9%	33%	15%	14%	24%	13%	19%	23%	29%	17%	9%	21%	14%	23%	15%	16%
Not very concerned	28%	32%	24%	32%	32%	24%	28%	17%	34%	30%	17%	29%	30%	30%	37%	20%	27%	27%	27%	30%	23%
Fairly concerned	27%	26%	28%	19%	32%	30%	20%	28%	31%	23%	33%	27%	18%	19%	37%	46%	32%	22%	27%	27%	28%
Very concerned	15%	12%	18%	17%	12%	22%	7%	23%	11%	13%	19%	14%	28%	12%	8%	25%	18%	15%	13%	19%	11%
Dont know/cant say	12%	13%	11%	11%	6%	16%	12%	16%	10%	10%	18%	11%	0%	10%	0%	0%	3%	23%	10%	7%	22%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	357	176	181	27	110	144	74	102	133	122	51	297	8	76	37	41	58	145	121	152	83

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	5%	4%	5%	8%	5%	5%	3%	4%	6%	4%	4%	4%	28%	1%	6%	12%	7%	3%	5%	4%	6%
Ensuring a reliable & continuous water supply	6%	4%	8%	4%	6%	7%	3%	5%	5%	7%	11%	5%	7%	6%	7%	12%	5%	4%	3%	9%	3%
Ensuring the safety of tap water	20%	19%	21%	16%	25%	24%	7%	25%	19%	18%	29%	20%	0%	14%	22%	27%	34%	16%	18%	24%	18%
Managing the appearance, taste & smell of tap water	5%	5%	4%	16%	5%	2%	5%	3%	4%	7%	9%	3%	28%	8%	2%	12%	1%	3%	4%	4%	9%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	0%	3%	0%	3%	0%	3%	0%	2%	2%	2%	1%	0%	1%	2%	1%	0%	2%	2%	2%	0%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	7%	3%	11%	7%	7%	11%	1%	7%	8%	7%	10%	7%	0%	6%	14%	12%	6%	6%	9%	7%	7%
Avoid the risk of homes & gardens being flooded with sewerage	4%	2%	6%	3%	3%	5%	3%	6%	2%	4%	5%	4%	0%	1%	5%	7%	3%	4%	3%	7%	1%
Managing the amount of water taken from the environment to supply customers	1%	1%	1%	2%	1%	2%	0%	1%	2%	0%	3%	1%	0%	1%	3%	0%	0%	2%	1%	1%	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	8%	6%	10%	2%	8%	13%	1%	16%	7%	3%	7%	8%	0%	3%	7%	15%	10%	8%	5%	11%	6%
No of respondents	357	176	181	27	110	144	74	102	133	122	51	297	8	76	37	41	58	145	121	152	83

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	10%	10%	10%	23%	8%	10%	8%	14%	6%	10%	6%	9%	44%	13%	6%	24%	5%	7%	10%	8%	13%
Bills show one big change in first year	9%	5%	12%	13%	7%	9%	8%	8%	7%	12%	14%	8%	0%	18%	13%	1%	4%	7%	10%	6%	12%
Bills change steadily every year	81%	85%	78%	64%	85%	82%	84%	78%	87%	78%	80%	82%	56%	69%	81%	74%	91%	86%	80%	86%	75%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	352	172	180	27	108	144	71	100	131	122	51	292	8	76	36	40	58	142	119	150	82

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£19)	Maintain current service (£17)	Maintain current service (£14)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£1)	Maintain current service (£1)	Maintain current service (£1)
	3. Ensuring the safety of tap water	Meet current and future standards at 20 of treatment works, 1,970 Km of water mains renovated to complete the renovation previously agreed, 49,300 of water company lead pipes replaced to meet new lead standards (£11)	Meet current and future standards at 20 treatment works, 1,970 Km of water mains renovated to complete the renovation previously agreed, 56,005 of water company lead pipes replaced to meet new lead standards (£11)	Meet current and future standards at 20 of treatment works, 1,970 Km of water mains renovated to complete the renovation previously agreed, 66,729 of water company lead pipes replaced to meet new lead standards (£11)
	4. Managing the appearance, taste and smell of tap water	48% fewer customer complaints about the appearance, taste or smell of tap water (£1)	48% fewer customer complaints about the appearance, taste or smell of tap water (£2)	53 % fewer customer complaints about the appearance, taste or smell of tap water (£1)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 2 sewage treatment works (£11)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 2 sewage treatment works (£10)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 2 sewage treatment works (£13)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 300 to 230. Reduce the number of properties externally flooding from sewers by 73 (£2)	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 300 to 230. Reduce the number of properties externally flooding from sewers by 73 (£2)	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 300 to 230. Reduce the number of properties externally flooding from sewers by 73. Reduce the number of properties at risk of flooding from sewers at (£2)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (Less than £1)	Maintain current service (Less than £1)	1 wetland or lake are restored and protected to support rare wildlife (Less than £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	53 Km of rivers can better support fish (£9)	53 Km of rivers can better support fish, 24 Km of rivers can support rare wildlife,1 wetlands and 1 lake is improved and can support rare wildlife (£10)	481 Km of rivers can better support fish, 24 Km of rivers can support rare wildlife, 1 wetlands and 1 lakes are improved and can support rare wildlife (£52)
		Overall cost on average bill by 2010 is £48 (excluding inflation). Overall bill by 2010 is £278 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £46 (plus inflation).Overall bill by 2010 is £275 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £88 (excluding inflation). Overall bill by 2010 is £318 (plus inflation)

1. Key Findings

Welsh Water Dŵr Cymru is a water and sewerage company serving 2.88 million customers with water and 3 million with wastewater services. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £65
Reference Plan A - £57
Reference Plan B - £74

☐ 89% of customers stated that they were satisfied with the service currently provided by Welsh Water, with 20% indicating that they were 'extremely satisfied'. Just 7% said that they were dissatisfied. 52% of customers said that the service represented good value for money, whilst 25% indicated that it was poor value for money.

☐ More than 93% of customers expressed the view that it was important to maintain the current level of all services, in particular, 'ensuring a reliable and continuous water supply' and 'ensuring the safety of tap water' (99% for both). Between 67% and 83% of customers considered it important to introduce improvements to all services before 2010, with improvements to 'managing the appearance, taste and smell of tap water' (83%) and 'ensuring the safety of tap water' (82%) ranked as priorities, and improvements to 'handling customer accounts, queries, complaints and customers with special needs' least important.

☐ Customer approval was greatest for the Company Preferred Plan and Reference Plan A. Across all three plans, (each of which proposed a combination of maintained and improved services), the proposed output customers would most like to see is 'ensuring the safety of tap water' (54% for Reference Plan A and 62%, 61% for the Company Preferred Plan and Reference Plan A). Second and third priorities were 'managing the appearance taste and smell of tap water' (48% for Reference Plan B, 54% for Reference Plan A and 57% for the Company Preferred Plan) and 'ensuring a reliable and continuous water supply' (49% for Reference Plan B, 54% for the Company Preferred Plan and Reference Plan A).

☐ 69% of customers indicated that there was no service area in which they would like to see any additional improvements to those proposed in the plans. 17% of customers however, would like to see further improvements to 'ensuring the safety of tap water'.

☐ Customers considered the Company Preferred Plan and Reference Plan A better value for money than Reference Plan B (46% compared to 32%). 42% thought that Reference Plan B represented poor value for money, yet this proportion was 34% for Reference Plan A and 31% for the Company Preferred Plan.

☐ 58% and 59% respectively were willing to pay for the Company Preferred Plan (45% probably willing, 13% definitely willing) and Reference Plan A (45% probably willing, 14% definitely willing). This proportion was just 49% (36% probably willing, 13% definitely willing) for Reference Plan B. The proportion of customers indicating that they were 'not willing to pay' was 36% and 39% respectively for the Company Preferred Plan (19% probably not willing, 17% definitely not willing) and Reference Plan A (21% probably not willing, 18% definitely not willing) and significantly higher (48%) for Reference Plan B (27% probably not willing, 21% definitely not willing).

☐ Of those customers who indicated they were definitely or probably not willing to pay, 51% said that this was because the 'cost is too much for the improvements' in Company Preferred Plan and Reference Plan A and 50% said this for Reference Plan B. Between 17% and 18% of all Dŵr Cymru water customers indicated that they could not afford the proposed bill increases set out in the plans (17% for the Company Preferred Plan and Reference Plan A and 18% for Reference Plan B).

☐ 53% of customers said they would not be concerned if some of the improvements had to be delayed until after 2010 and 35% said they would be concerned. Where there was concern, is was greatest for delays to 'ensuring the safety of tap water' (15%). 0% of customers were concerned about delays in improvements to 'maintaining water pressure in taps and the number of unplanned interruptions to supplies'.

☐ 79% of Dŵr Cymru Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at a cost of £14-£15/annum), 'managing the appearance, taste and smell of tap water' (less than £1/annum) and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£14-£16/annum).

2. Introduction

The attitudes and preferences of Welsh Water Dŵr Cymru customers, reported in section 3, are based on a sample of 202 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.89% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 10,565 customer contacts/complaints about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	410 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	99.9% of billing enquiries answered within 5 days and 99.8% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	285 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	31 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	97% of rivers are of good, 1% fair and 2% poor quality.100% of designated bathing waters meet minimum standards and 83% meet higher standards.12% of rivers may be at risk from weed growth that can adversely affect wildlife.

Average bill in this area = £270 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very dissatisfied	2%	3%	2%	0%	5%	0%	2%	4%	1%	2%	10%	1%	0%	3%	2%	0%	6%	1%	2%	1%	6%
Fairly dissatisfied	5%	4%	5%	0%	1%	10%	2%	4%	2%	8%	6%	4%	0%	9%	11%	0%	2%	2%	5%	2%	6%
Neither satisfied nor dissatisfied	4%	4%	4%	21%	2%	4%	2%	0%	4%	7%	3%	4%	0%	6%	5%	0%	0%	6%	3%	4%	6%
Fairly satisfied	33%	28%	37%	36%	42%	28%	21%	44%	30%	25%	35%	32%	0%	26%	22%	35%	57%	26%	26%	48%	26%
Very satisfied	36%	39%	34%	23%	27%	44%	45%	34%	41%	33%	30%	37%	100%	43%	34%	44%	33%	35%	38%	32%	41%
Extremely satisfied	20%	22%	18%	21%	22%	13%	28%	13%	20%	25%	16%	20%	0%	13%	27%	21%	2%	28%	26%	11%	16%
Dont know/cant say	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	98	104	11	77	76	37	58	77	67	24	177	1	24	44	26	40	67	97	61	41

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Very poor value	10%	9%	11%	15%	12%	7%	11%	13%	9%	9%	14%	9%	100%	7%	20%	4%	14%	5%	13%	2%	16%
Fairly poor value	15%	13%	17%	7%	9%	23%	13%	13%	14%	17%	14%	15%	0%	25%	7%	12%	16%	17%	17%	6%	19%
Neither poor nor good value	18%	18%	19%	14%	22%	21%	6%	18%	18%	18%	20%	18%	0%	12%	18%	7%	11%	30%	15%	12%	33%
Fairly good value	33%	37%	30%	28%	37%	30%	33%	39%	32%	30%	36%	33%	0%	31%	29%	39%	45%	27%	35%	44%	17%
Very good value	16%	17%	15%	21%	12%	15%	25%	13%	17%	17%	16%	16%	0%	13%	18%	22%	12%	15%	16%	19%	14%
Extremely good value	3%	3%	4%	7%	3%	1%	6%	0%	6%	3%	0%	4%	0%	0%	7%	3%	2%	3%	3%	7%	0%
Dont know/cant say	4%	4%	5%	7%	5%	4%	4%	5%	3%	5%	0%	5%	0%	13%	0%	13%	0%	3%	1%	11%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	202	98	104	11	77	76	37	58	77	67	24	177	1	24	44	26	40	67	97	61	41

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	98%	99%	98%	87%	99%	100%	98%	100%	99%	97%	97%	99%	100%	97%	95%	100%	100%	100%	98%	99%	98%
Ensuring a reliable & continuous water supply	99%	99%	98%	87%	100%	99%	98%	100%	100%	96%	97%	99%	100%	94%	97%	100%	100%	100%	98%	99%	100%
Ensuring the safety of tap water	99%	100%	99%	93%	100%	100%	98%	100%	100%	98%	97%	100%	100%	97%	98%	100%	100%	100%	98%	100%	100%
Managing the appearance, taste & smell of tap water	98%	100%	97%	93%	98%	100%	98%	100%	98%	98%	97%	99%	100%	97%	98%	96%	100%	99%	98%	98%	98%
Managing the pressure of water in your taps & the number of unplanned interruptions	98%	99%	97%	86%	98%	100%	98%	100%	98%	97%	97%	98%	100%	93%	97%	100%	100%	99%	98%	99%	96%
Handling customers' accounts, queries, complaints & customers with special needs	96%	94%	97%	80%	96%	98%	94%	100%	96%	91%	94%	96%	100%	93%	90%	94%	98%	99%	98%	93%	96%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	96%	95%	96%	80%	96%	98%	96%	96%	95%	96%	97%	95%	100%	93%	95%	93%	92%	100%	98%	93%	92%
Avoid the risk of homes & gardens being flooded with sewerage	93%	93%	93%	80%	95%	94%	93%	92%	93%	95%	93%	93%	100%	93%	95%	78%	92%	99%	98%	87%	92%
Managing the amount of water taken from the environment to supply customers	94%	95%	93%	80%	96%	96%	92%	100%	92%	91%	90%	95%	100%	88%	91%	91%	95%	99%	96%	88%	98%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	95%	96%	95%	80%	98%	97%	92%	100%	97%	90%	94%	96%	100%	88%	92%	94%	98%	100%	96%	92%	98%
No of respondents	202	98	104	11	77	76	37	58	78	66	24	177	1	24	44	26	41	67	97	61	41

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	75%	73%	78%	73%	73%	78%	77%	74%	78%	73%	63%	77%	100%	77%	71%	75%	77%	77%	71%	86%	73%
Ensuring a reliable & continuous water supply	77%	74%	80%	72%	74%	79%	80%	70%	85%	73%	66%	78%	100%	74%	74%	83%	69%	83%	74%	84%	74%
Ensuring the safety of tap water	82%	76%	87%	79%	77%	87%	83%	74%	90%	79%	77%	82%	100%	83%	74%	83%	77%	89%	82%	85%	76%
Managing the appearance, taste & smell of tap water	83%	75%	91%	72%	85%	84%	84%	82%	88%	79%	86%	83%	100%	82%	80%	67%	98%	85%	82%	85%	84%
Managing the pressure of water in your taps & the number of unplanned interruptions	73%	68%	77%	64%	70%	77%	73%	70%	78%	69%	66%	74%	100%	76%	68%	73%	67%	78%	73%	77%	70%
Handling customers' accounts, queries, complaints & customers with special needs	67%	60%	72%	57%	61%	71%	71%	61%	73%	64%	66%	66%	100%	76%	64%	48%	64%	73%	70%	60%	69%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	76%	74%	79%	57%	77%	78%	79%	70%	84%	73%	66%	78%	100%	76%	72%	67%	77%	83%	78%	79%	71%
Avoid the risk of homes & gardens being flooded with sewerage	75%	76%	74%	59%	68%	83%	79%	70%	83%	71%	66%	76%	100%	73%	72%	59%	69%	88%	79%	72%	74%
Managing the amount of water taken from the environment to supply customers	74%	73%	76%	59%	69%	81%	77%	74%	79%	69%	59%	76%	100%	70%	69%	67%	69%	85%	74%	77%	74%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	77%	76%	77%	59%	76%	79%	77%	78%	83%	68%	63%	78%	100%	70%	70%	70%	75%	87%	76%	81%	74%
No of respondents	202	98	104	11	77	76	37	58	78	66	24	177	1	24	44	26	41	67	97	61	41

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	52%	45%	58%	57%	46%	60%	46%	43%	59%	51%	62%	50%	100%	45%	61%	53%	47%	51%	49%	55%	57%
Ensuring a reliable & continuous water supply	54%	48%	59%	57%	50%	60%	48%	43%	59%	57%	72%	51%	100%	48%	57%	50%	50%	57%	51%	55%	59%
Ensuring the safety of tap water	62%	59%	64%	79%	61%	65%	54%	48%	72%	63%	74%	60%	100%	48%	64%	72%	59%	63%	53%	69%	71%
Managing the appearance, taste & smell of tap water	57%	53%	62%	64%	54%	63%	50%	48%	68%	53%	63%	57%	100%	39%	61%	56%	57%	63%	47%	68%	67%
Managing the pressure of water in your taps & the number of unplanned interruptions	52%	45%	58%	50%	45%	57%	57%	43%	57%	53%	64%	50%	100%	42%	57%	41%	47%	60%	43%	59%	61%
Handling customers' accounts, queries, complaints & customers with special needs	46%	38%	54%	43%	45%	51%	42%	35%	56%	46%	62%	44%	100%	45%	50%	38%	47%	48%	40%	51%	57%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	53%	46%	60%	64%	51%	57%	48%	39%	64%	53%	79%	50%	100%	42%	57%	50%	49%	59%	48%	59%	59%
Avoid the risk of homes & gardens being flooded with sewerage	52%	44%	59%	50%	48%	58%	48%	43%	59%	51%	72%	49%	100%	35%	59%	53%	49%	54%	49%	55%	57%
Managing the amount of water taken from the environment to supply customers	50%	45%	55%	51%	49%	55%	42%	43%	59%	46%	69%	47%	100%	39%	54%	50%	47%	54%	47%	50%	59%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	51%	44%	57%	51%	48%	56%	46%	39%	60%	50%	59%	49%	100%	49%	60%	41%	47%	52%	48%	51%	59%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	49%	43%	54%	43%	39%	61%	46%	39%	53%	52%	55%	48%	100%	48%	57%	44%	48%	46%	47%	48%	58%
Ensuring a reliable & continuous water supply	54%	51%	56%	58%	49%	61%	48%	39%	58%	62%	68%	52%	100%	45%	58%	53%	52%	55%	52%	49%	64%
Ensuring the safety of tap water	61%	58%	64%	72%	59%	65%	54%	43%	72%	64%	69%	60%	100%	51%	60%	67%	60%	63%	53%	66%	74%
Managing the appearance, taste & smell of tap water	54%	51%	58%	49%	52%	60%	50%	44%	63%	54%	59%	53%	100%	39%	59%	45%	55%	60%	48%	59%	61%
Managing the pressure of water in your taps & the number of unplanned interruptions	49%	48%	49%	36%	45%	55%	48%	43%	53%	49%	71%	46%	100%	39%	53%	41%	52%	51%	43%	48%	65%
Handling customers' accounts, queries, complaints & customers with special needs	45%	41%	50%	36%	43%	51%	42%	35%	53%	46%	68%	42%	100%	45%	49%	29%	53%	45%	40%	45%	63%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	52%	45%	58%	51%	45%	58%	54%	31%	64%	56%	62%	50%	100%	48%	56%	41%	50%	56%	47%	56%	59%
Avoid the risk of homes & gardens being flooded with sewerage	49%	41%	57%	43%	43%	58%	48%	39%	56%	51%	55%	48%	100%	42%	59%	35%	53%	49%	46%	51%	59%
Managing the amount of water taken from the environment to supply customers	48%	42%	54%	51%	39%	59%	42%	39%	57%	44%	55%	47%	100%	42%	48%	32%	53%	53%	44%	42%	67%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	46%	39%	54%	36%	37%	61%	40%	40%	52%	45%	52%	45%	100%	42%	52%	35%	51%	46%	43%	44%	60%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	44%	37%	51%	50%	39%	48%	44%	30%	50%	49%	57%	42%	100%	45%	56%	50%	48%	31%	39%	45%	58%
Ensuring a reliable & continuous water supply	49%	44%	53%	64%	49%	48%	45%	30%	53%	59%	67%	46%	100%	49%	56%	56%	48%	41%	45%	45%	64%
Ensuring the safety of tap water	54%	48%	60%	78%	54%	51%	54%	26%	67%	63%	74%	51%	100%	48%	62%	63%	54%	48%	45%	56%	71%
Managing the appearance, taste & smell of tap water	48%	41%	55%	57%	48%	44%	54%	26%	60%	52%	61%	46%	100%	42%	56%	42%	53%	44%	38%	52%	65%
Managing the pressure of water in your taps & the number of unplanned interruptions	43%	40%	45%	36%	42%	43%	46%	30%	50%	46%	70%	39%	100%	39%	51%	37%	52%	36%	34%	44%	65%
Handling customers' accounts, queries, complaints & customers with special needs	39%	34%	44%	36%	40%	39%	40%	26%	48%	42%	67%	35%	100%	45%	47%	35%	51%	27%	29%	41%	63%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	45%	36%	53%	57%	42%	45%	44%	18%	60%	49%	61%	42%	100%	39%	55%	35%	48%	41%	37%	48%	59%
Avoid the risk of homes & gardens being flooded with sewerage	43%	36%	50%	50%	41%	42%	50%	26%	53%	47%	57%	41%	100%	36%	59%	44%	49%	32%	38%	43%	59%
Managing the amount of water taken from the environment to supply customers	43%	34%	51%	51%	35%	51%	39%	31%	52%	42%	53%	41%	100%	39%	52%	32%	53%	36%	37%	36%	67%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	41%	31%	50%	36%	37%	46%	38%	31%	48%	41%	50%	39%	100%	42%	48%	38%	51%	30%	35%	39%	60%
No of respondents	202	99	103	11	77	76	38	58	78	66	24	178	1	24	44	26	41	66	97	61	41

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	6%
Ensuring a reliable & continuous water supply	5%
Ensuring the safety of tap water	17%
Managing the appearance, taste & smell of tap water	8%
Managing the pressure of water in your taps & the number of unplanned interruptions	7%
Handling customers' accounts, queries, complaints & customers with special needs	3%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	7%
Avoid the risk of homes & gardens being flooded with sewerage	9%
Managing the amount of water taken from the environment to supply customers	4%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	9%
Reduce chemical treatments in water supply	2%
Increase number of water butts available	3%
More water conservation education	1%
No, none	69%
No of respondents	200

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	5%	4%	0%	5%	6%	2%	9%	2%	3%	21%	2%	0%	3%	0%	0%	12%	5%	7%	0%	6%
Very poor value	13%	17%	9%	7%	18%	10%	12%	17%	11%	12%	9%	13%	100%	21%	13%	10%	12%	12%	21%	4%	10%
Fairly poor value	14%	13%	15%	7%	14%	12%	17%	9%	16%	15%	7%	15%	0%	21%	13%	16%	6%	16%	15%	15%	10%
Neither poor nor good value	19%	15%	23%	44%	20%	18%	12%	9%	25%	23%	13%	20%	0%	20%	29%	19%	17%	15%	18%	13%	34%
Fairly good value	34%	39%	29%	28%	28%	35%	45%	39%	31%	33%	40%	33%	0%	29%	26%	34%	46%	33%	25%	52%	26%
Very good value	11%	9%	13%	0%	7%	17%	12%	13%	12%	10%	11%	11%	0%	3%	18%	11%	7%	13%	14%	8%	10%
Extremely good value	1%	0%	2%	7%	2%	0%	0%	0%	1%	2%	0%	1%	0%	0%	2%	0%	0%	3%	2%	0%	2%
Dont know/cant say	3%	2%	4%	7%	6%	1%	0%	5%	2%	2%	0%	3%	0%	4%	0%	10%	0%	4%	0%	8%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	7%	9%	5%	0%	14%	3%	4%	13%	5%	5%	10%	6%	100%	3%	4%	0%	12%	11%	13%	0%	6%
Very poor value	15%	15%	15%	7%	16%	17%	9%	18%	13%	15%	20%	14%	0%	27%	17%	14%	12%	11%	21%	5%	17%
Fairly poor value	12%	10%	14%	0%	10%	13%	16%	9%	12%	14%	7%	13%	0%	15%	9%	9%	12%	14%	9%	13%	18%
Neither poor nor good value	19%	14%	23%	38%	22%	12%	20%	5%	28%	21%	10%	20%	0%	26%	31%	17%	9%	15%	15%	16%	31%
Fairly good value	34%	41%	27%	48%	26%	38%	37%	43%	29%	32%	29%	35%	0%	25%	19%	46%	37%	40%	33%	51%	8%
Very good value	11%	8%	14%	0%	9%	15%	10%	13%	13%	8%	25%	9%	0%	0%	19%	12%	17%	6%	9%	13%	15%
Extremely good value	1%	1%	1%	0%	1%	0%	4%	0%	0%	3%	0%	1%	0%	0%	0%	2%	0%	2%	2%	0%	2%
Dont know/cant say	1%	2%	1%	7%	1%	1%	0%	0%	1%	2%	0%	1%	0%	4%	2%	0%	0%	1%	0%	1%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20k	20-30k	30K+	DK	Rural	Sub	Urban
Extremely poor value	6%	6%	7%	7%	12%	3%	2%	9%	5%	6%	10%	6%	100%	3%	9%	0%	6%	9%	11%	0%	6%
Very poor value	21%	18%	24%	7%	25%	23%	14%	31%	18%	16%	24%	21%	0%	34%	13%	10%	30%	21%	28%	14%	19%
Fairly poor value	15%	17%	13%	21%	11%	14%	20%	4%	18%	19%	16%	14%	0%	21%	18%	13%	14%	11%	13%	16%	19%
Neither poor nor good value	23%	27%	20%	37%	20%	24%	26%	9%	30%	29%	3%	26%	0%	23%	27%	41%	10%	22%	20%	22%	30%
Fairly good value	25%	27%	24%	21%	23%	26%	29%	38%	19%	22%	36%	24%	0%	12%	15%	36%	29%	30%	20%	40%	14%
Very good value	6%	3%	9%	0%	5%	9%	6%	4%	8%	5%	7%	6%	0%	3%	16%	0%	4%	5%	8%	4%	6%
Extremely good value	1%	1%	1%	0%	0%	0%	4%	0%	1%	1%	3%	0%	0%	0%	0%	0%	0%	2%	1%	0%	2%
Dont know/cant say	2%	2%	3%	7%	4%	1%	0%	5%	1%	1%	0%	2%	0%	4%	2%	0%	7%	0%	0%	4%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	17%	20%	14%	28%	19%	15%	13%	13%	18%	19%	25%	16%	0%	22%	20%	17%	17%	14%	17%	13%	20%
Probably not willing to pay	19%	19%	19%	30%	21%	14%	23%	9%	26%	19%	12%	20%	100%	31%	24%	13%	10%	19%	23%	14%	17%
Probably willing to pay	45%	46%	44%	14%	47%	49%	43%	56%	41%	41%	40%	46%	0%	26%	36%	46%	52%	54%	40%	54%	47%
Definitely willing to pay	13%	12%	14%	21%	4%	21%	15%	13%	14%	13%	20%	12%	0%	9%	17%	14%	21%	7%	12%	14%	14%
Dont know/Cant say	6%	3%	8%	7%	9%	2%	6%	9%	1%	8%	3%	6%	0%	12%	3%	10%	0%	6%	7%	4%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	7%	5%	10%	0%	8%	12%	0%	21%	5%	3%	30%	4%	0%	0%	0%	11%	24%	7%	11%	5%	0%
Cost too much for improvements	51%	53%	49%	12%	69%	52%	27%	79%	50%	38%	52%	50%	100%	27%	56%	46%	55%	60%	63%	26%	51%
Cant afford it	42%	42%	42%	88%	23%	36%	73%	0%	45%	59%	18%	46%	0%	73%	44%	43%	21%	33%	26%	69%	49%
Dont know/Cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	73	38	35	7	31	22	14	13	35	26	9	63	1	13	19	8	11	22	39	17	15

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	18%	17%	18%	14%	23%	16%	11%	18%	16%	19%	28%	16%	100%	18%	20%	7%	21%	18%	23%	10%	16%
Probably not willing to pay	21%	22%	21%	43%	22%	13%	30%	9%	26%	27%	15%	22%	0%	47%	23%	23%	4%	21%	23%	16%	25%
Probably willing to pay	45%	45%	45%	7%	46%	52%	39%	65%	40%	33%	38%	46%	0%	22%	31%	55%	61%	48%	35%	63%	44%
Definitely willing to pay	14%	12%	16%	35%	7%	16%	18%	9%	15%	17%	20%	13%	0%	13%	20%	15%	14%	10%	16%	11%	14%
Dont know/Cant say	2%	4%	1%	0%	2%	3%	2%	0%	3%	3%	0%	3%	0%	0%	5%	0%	0%	4%	3%	0%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	7%	4%	9%	0%	5%	16%	0%	17%	8%	0%	26%	4%	0%	0%	0%	23%	26%	3%	8%	11%	0%
Cost too much for improvements	51%	56%	47%	12%	70%	47%	32%	83%	44%	44%	52%	51%	100%	40%	55%	35%	51%	61%	69%	14%	47%
Cant afford it	41%	40%	42%	88%	25%	36%	63%	0%	48%	54%	23%	44%	0%	60%	45%	43%	23%	33%	22%	75%	53%
Dont know/Cant say	1%	0%	2%	0%	0%	0%	5%	0%	0%	2%	0%	1%	0%	0%	0%	0%	0%	3%	2%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	79	39	40	7	35	22	16	15	33	31	10	68	1	16	19	8	10	26	44	16	17

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	21%	23%	19%	14%	25%	19%	19%	18%	20%	25%	31%	19%	100%	24%	31%	10%	23%	17%	24%	16%	20%
Probably not willing to pay	27%	22%	32%	43%	27%	19%	37%	18%	34%	26%	19%	28%	0%	42%	20%	41%	19%	26%	25%	31%	25%
Probably willing to pay	36%	36%	37%	7%	35%	47%	26%	47%	33%	31%	33%	37%	0%	25%	26%	39%	40%	44%	32%	43%	40%
Definitely willing to pay	13%	13%	12%	28%	10%	12%	16%	17%	9%	13%	17%	12%	0%	6%	20%	9%	16%	9%	15%	9%	13%
Dont know/Cant say	3%	5%	1%	7%	2%	4%	2%	0%	3%	5%	0%	3%	0%	3%	3%	3%	2%	4%	4%	1%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	11%	6%	15%	0%	17%	13%	0%	26%	11%	2%	22%	9%	0%	0%	0%	47%	15%	6%	9%	19%	5%
Cost too much for improvements	50%	56%	46%	0%	64%	56%	31%	62%	50%	44%	47%	50%	100%	31%	51%	27%	71%	59%	66%	28%	45%
Cant afford it	35%	39%	32%	100%	19%	31%	54%	0%	39%	52%	31%	36%	0%	69%	49%	26%	14%	23%	23%	44%	50%
Dont know/Cant say	3%	0%	6%	0%	0%	0%	15%	12%	0%	2%	0%	4%	0%	0%	0%	0%	0%	12%	2%	9%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	96	44	52	6	41	28	22	21	42	34	12	83	1	16	22	13	17	28	48	29	18

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	31%	33%	30%	20%	36%	26%	36%	35%	25%	36%	12%	34%	0%	42%	31%	19%	27%	35%	39%	25%	23%
Not very concerned	22%	25%	19%	34%	19%	20%	27%	12%	24%	27%	14%	22%	100%	28%	34%	30%	12%	14%	24%	23%	15%
Fairly concerned	22%	20%	23%	7%	23%	26%	13%	27%	21%	18%	6%	24%	0%	13%	20%	23%	29%	21%	19%	29%	16%
Very concerned	13%	13%	14%	0%	10%	21%	9%	18%	15%	8%	31%	11%	0%	3%	7%	16%	19%	16%	13%	19%	6%
Dont know/cant say	12%	10%	15%	38%	13%	7%	14%	9%	15%	12%	37%	9%	0%	14%	7%	12%	13%	14%	6%	3%	40%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	2%	2%	2%	0%	1%	5%	0%	0%	2%	4%	0%	3%	0%	0%	2%	4%	2%	3%	0%	8%	0%
Ensuring a reliable & continuous water supply	6%	5%	7%	7%	4%	9%	2%	13%	2%	3%	6%	6%	0%	7%	2%	0%	7%	10%	4%	11%	2%
Ensuring the safety of tap water	15%	15%	16%	7%	18%	18%	8%	18%	19%	9%	24%	14%	0%	4%	9%	30%	18%	16%	12%	21%	16%
Managing the appearance, taste & smell of tap water	5%	3%	8%	0%	5%	7%	4%	9%	6%	2%	4%	6%	0%	0%	7%	17%	0%	5%	2%	13%	4%
Managing the pressure of water in your taps & the number of unplanned interruptions	0%	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	4%	0%	0%	0%	2%	0%
Handling customers' accounts, queries, complaints & customers with special needs	1%	2%	0%	0%	1%	1%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	2%	1%	1%	1%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	7%	7%	7%	0%	12%	4%	4%	13%	5%	3%	17%	6%	0%	3%	2%	10%	16%	5%	2%	15%	8%
Avoid the risk of homes & gardens being flooded with sewerage	3%	1%	4%	0%	1%	6%	0%	4%	2%	1%	4%	2%	0%	3%	6%	0%	2%	1%	4%	1%	0%
Managing the amount of water taken from the environment to supply customers	1%	0%	2%	0%	1%	1%	0%	0%	1%	1%	0%	1%	0%	0%	0%	0%	0%	3%	1%	1%	0%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	6%	3%	9%	0%	9%	7%	0%	14%	5%	1%	10%	6%	0%	0%	4%	3%	19%	3%	4%	6%	12%
No of respondents	203	99	104	11	77	76	38	58	78	67	24	178	1	24	44	26	41	67	97	61	41

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	15%	18%	12%	0%	20%	17%	4%	33%	8%	8%	11%	15%	0%	10%	18%	17%	8%	17%	22%	5%	14%
Bills show one big change in first year	7%	8%	5%	0%	4%	7%	12%	0%	10%	8%	4%	7%	0%	6%	9%	0%	4%	9%	5%	5%	8%
Bills change steadily every year	79%	74%	84%	100%	75%	76%	84%	67%	82%	85%	85%	78%	100%	83%	73%	83%	88%	74%	73%	90%	78%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	196	93	103	11	74	73	38	53	77	66	22	174	1	24	44	24	41	63	91	61	41

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£19)	Maintain current service (£17)	Maintain current service (£23)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£13)	Maintain current service (£3)	Maintain current service (£3)
	3. Ensuring the safety of tap water	Meet current and future standards at 7 of treatment works, 2557 Km of water mains renovated to complete the renovation previously agreed, 23,360 of water company lead pipes replaced to meet new lead standards (£14)	Meet current and future standards at 7 treatment works, 2,557 Km of water mains renovated to complete the renovation previously agreed, 11,645 of water company lead pipes replaced to meet new lead standards (£14)	Meet current and future standards at 10 of treatment works, 2,557 Km of water mains renovated to complete the renovation previously agreed, 23,360 of water company lead pipes replaced to meet new lead standards (£15)
	4. Managing the appearance, taste and smell of tap water	Fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)	Fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)	Fewer customer complaints about the appearance, taste or smell of tap water (Less than £1)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£16)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£14)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£14)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 274 to 50 Reduce the number of properties at risk of internal flooding once in thirty years from 320 to 30. Reduce the number of properties externally (£2)	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity (£1)	Removal of all properties at risk of internal flooding from sewers at least once in thirty years and external flooding of the same severity (£3)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (Less than £1)	Maintain current service (Less than £1)	490 Km of rivers can better support fish and rare wildlife (Less than £1)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	232 Km of rivers can better support fish, 224 Km of rivers can support rare wildlife, 6 designated bathing waters are improved (£18)	232 Km of rivers can better support fish, 224 Km of rivers can support rare wildlife (£17)	618 Km of rivers can better support fish, 224 Km of rivers can support rare wildlife, 14 designated bathing waters are improved (£26)
		Overall cost on average bill taking account of cost savings by 2010 is £72 (excluding inflation). Overall bill by 2010 is £347 (plus inflation)	Overall cost on average bill taking account of cost savings by 2010 is £66 (excluding inflation). Overall bill by 2010 is £341 (plus inflation)	Overall cost on average bill by 2010 is £84 (excluding inflation). Overall bill by 2010 is £359 (plus inflation)

Dee Valley Water Plc

1. Key Findings

Dee Valley Water is a water supply only company providing water services to 257,000 customers. The proposed increases for the average bill of the company plans are:

Company Preferred Plan - £57
Reference Plan A - £42
Reference Plan B - £52

☐ 87% of customers stated that they were satisfied with the current service provided, with 48% saying they were 'very satisfied'. 8% of customers expressed dissatisfaction with the service. 71% of customers said they thought the service to be good value for money, with 33% saying that this was 'very good' value for money. 17% indicated that the service was poor value for money.

☐ More than 92% of customers expressed the view that it was important to maintain the current level of all services, in particular, 'ensuring a reliable and continuous water supply' and 'ensuring the safety of tap water' (97% for both). Between 79% and 85% customers considered it important to introduce improvements to all services before 2010. Least priority (79%) was attached to improvements to 'Handling customer accounts, queries, complaints and customers with special needs'.

☐ All three company plans (each of which proposed a combination of maintained and improved services) received similarly high approval from customers. Across all three plans the proposed output customers would most like to see is 'ensuring the safety of tap water' (80%-83%). Other proposals customers would most like to see included 'maintaining water pipes, treatment works and reservoirs' (77%-83%), 'avoiding the risk of homes and gardens being flooded with sewage' (78%-80%) and 'ensuring a reliable and continuous water supply' (77%-81%). 'Handling customers' accounts, queries, complaints and customers with special needs' was ranked as the lowest priority within each plan, with customer support ranging from 71% for the Company Preferred plan and 76% for Reference Plan A and B.

☐ 63% of customers did not wish to see any improvement in addition to those indicated in the company plans. 9% of customers did however, want to see improvements to 'maintaining sewers and sewage treatment works, ensuring network meets new demands and controlling smells from sewage works' and 8% wanted to see further improvement to 'managing the appearance, taste and smell of tap water'.

☐ Approximately two thirds of customers regarded all three company plans as good value for money- 70% for Reference Plan A, 65% for Reference Plan B and 64% for the Company Preferred Plan. 19% thought that in contrast, Reference Plan A represented poor value for money, and 21% and 23% thought the same of the Company Preferred Plan and Reference Plan B respectively.

☐ Customers were most willing (77%) to pay for Reference Plan A (48% probably willing, 29% definitely willing). 69% were willing to pay for the Company Preferred Plan (46% probably willing, 23% definitely willing) and Reference Plan B (45% probably willing, 24% definitely willing). The proportion of customers indicating that they were 'not willing to pay' was 20% for Reference Plan A (10% probably not willing, 10% definitely not willing) and 26% and 28% respectively for the Company Preferred Plan (14% probably not willing, 12% definitely not willing) and Reference Plan B (16% probably not willing, 12% definitely not willing).

☐ Of those customers who indicated they were definitely or probably not willing to pay, 49%, 47% and 53% said that this was because the 'cost is too much for the improvements' in Company Preferred Plan, Reference Plan A and Reference Plan B respectively. Between 10% and 11% of all Dee Valley water customers indicated that they could not afford the proposed bill increases set out in the plans (11% for the Company Preferred Plan, and 10% for Reference Plan A and B).

☐ 54% of customers said they would not be concerned if some of the improvements had to be delayed until after 2010 and 41% said they would be concerned. Where there was concern, it was greatest for delays to 'ensuring the safety of tap water' (25%) and 'maintaining sewers and sewage treatment works, ensuring network meets new demands and controlling smells from sewage works'(18%). 0% of customers were concerned about delays in improvements to 'maintaining water pressure in taps and the number of unplanned interruptions to supplies'.

☐ 82% of Dee Valley Water customers indicated that their preferred bill option for the period 2005 to 2010, is for bills to change steadily every year throughout the period, so that they do not see big changes from year to year.

Best Combination of Services for Customers

☐ As a minimum, current services should be maintained at existing levels. Of the proposed improvements presented to customers, the three which customers most wanted to see were: 'ensuring the safety of tap water' (at no extra cost), 'avoiding the risk of homes and gardens being flooded with sewage’ (£1-£3/annum), and 'maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works' (£14-£16/annum).

2. Introduction

The attitudes and preferences of Dee Valley Water customers, reported in section 3, are based on a sample of 200 bill payers. Results are broken down by gender; age; SEG; whether the household has a water meter; gross household income; and location of the property. Statistically significant differences at the 95% level of confidence are highlighted in grey. (The Chi-distribution test is applied to identify differences in responses amongst different customers segments)

Respondents were asked to respond to three possible future plans for water and sewerage in their area. These are referred to as the 'Company Preferred Strategy', 'Reference Plan A' and 'Reference Plan B'. The details of these plans are presented in section 4. The current level of service is as follows:

Current Provision of Water and Sewerage Services

	Service Area	Current Level of Service
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Repairing or replacing water pipes to ensure customers continue to receive the same level of service
	2. Ensuring a reliable and continuous water supply	Providing a continuous supply of water; with the risk of a hosepipe ban no more than once in ten years
	3. Ensuring the safety of tap water	99.86% of samples meeting the current standards for drinking water
	4. Managing the appearance, taste and smell of tap water	Approximately 836 customer complaints/contacts about the appearance, taste and smell of tap water each year
	5. Managing the pressure of water in your taps and interruptions to supply	164 properties at risk of low water pressure at the tap
	6. Handling customers' accounts, queries, complaints and customers with special needs	100% of billing enquiries answered within 5 days and 100% of written complaints answered within 10 days
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Repairing or replacing sewers to ensure customers continue to receive the same level of service
	8. Avoiding the risk of homes and gardens being flooded with sewage	285 properties at risk of internal flooding from sewers at least once in ten years
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	3 wetlands, lakes and rivers may be affected by the water companies taking too much water
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	97% of rivers are of good, 1% fair and 2% poor quality.100% of designated bathing waters meet minimum standards and 83% meet higher standards.12% of rivers may be at risk from weed growth that can adversely affect wildlife

Average bill in this area = £254 per annum

3 Detailed Findings

3.1 Current Satisfaction with Water and Sewerage Services and Views on Value for Money

Q1. HOW SATISFIED ARE YOU WITH THESE WATER AND SEWERAGE SERVICES OVERALL?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Extremely dissatisfied	1%	3%	0%	0%	1%	2%	0%	0%	2%	2%	0%	2%	0%	5%	0%	3%	0%	1%	4%	0%	0%
Very dissatisfied	3%	2%	4%	0%	4%	2%	1%	3%	3%	2%	0%	3%	0%	0%	3%	0%	3%	3%	1%	4%	4%
Fairly dissatisfied	4%	4%	3%	0%	2%	6%	3%	4%	4%	2%	0%	5%	0%	0%	0%	3%	9%	4%	9%	1%	0%
Neither satisfied nor dissatisfied	6%	4%	8%	0%	7%	7%	3%	3%	9%	6%	6%	6%	0%	0%	5%	4%	8%	7%	6%	8%	0%
Fairly satisfied	26%	20%	32%	24%	33%	24%	17%	17%	29%	31%	17%	28%	44%	46%	21%	38%	22%	21%	34%	16%	40%
Very satisfied	48%	48%	47%	76%	41%	49%	52%	51%	47%	44%	60%	45%	0%	37%	54%	42%	48%	50%	39%	55%	46%
Extremely satisfied	13%	19%	7%	0%	13%	9%	23%	22%	5%	13%	16%	12%	56%	11%	17%	9%	9%	14%	7%	16%	10%
Dont know/cant say	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q2. HOW DO YOU RATE YOUR WATER AND SEWERAGE SERVICES IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	7%	2%	0%	5%	5%	3%	4%	4%	4%	0%	5%	0%	11%	0%	3%	6%	3%	11%	0%	0%
Very poor value	4%	3%	4%	0%	2%	5%	3%	3%	4%	5%	4%	4%	0%	0%	0%	0%	0%	7%	4%	4%	4%
Fairly poor value	9%	9%	9%	0%	7%	10%	13%	10%	10%	7%	9%	9%	0%	6%	12%	4%	23%	6%	13%	5%	5%
Neither poor nor good value	10%	12%	9%	20%	14%	8%	5%	11%	8%	12%	4%	12%	0%	5%	3%	7%	6%	14%	12%	11%	4%
Fairly good value	36%	34%	39%	31%	36%	36%	38%	26%	39%	43%	30%	38%	44%	42%	61%	53%	27%	29%	31%	36%	53%
Very good value	33%	31%	34%	49%	30%	31%	37%	44%	32%	23%	46%	30%	0%	31%	17%	32%	38%	35%	24%	40%	34%
Extremely good value	2%	2%	2%	0%	2%	2%	1%	3%	1%	2%	5%	1%	0%	0%	6%	0%	0%	2%	0%	3%	0%
Dont know/cant say	3%	3%	2%	0%	4%	3%	0%	0%	3%	5%	1%	2%	56%	5%	0%	0%	0%	4%	5%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

3.2 Customer Views on the Importance on Maintaining and Improving Services

Q3. HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE?
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	96%	94%	97%	100%	96%	96%	96%	98%	97%	93%	90%	98%	44%	92%	100%	96%	98%	96%	96%	95%	100%
Ensuring a reliable & continuous water supply	97%	95%	98%	100%	99%	95%	96%	98%	97%	95%	94%	97%	100%	97%	100%	92%	96%	97%	97%	97%	95%
Ensuring the safety of tap water	97%	97%	98%	100%	99%	96%	99%	96%	99%	97%	92%	99%	100%	97%	100%	96%	100%	97%	98%	98%	95%
Managing the appearance, taste & smell of tap water	94%	92%	97%	100%	92%	95%	99%	94%	96%	94%	88%	97%	44%	92%	92%	96%	91%	96%	94%	96%	87%
Managing the pressure of water in your taps & the number of unplanned interruptions	93%	90%	95%	90%	93%	91%	96%	94%	92%	92%	87%	94%	100%	89%	92%	96%	87%	94%	94%	94%	78%
Handling customers' accounts, queries, complaints & customers with special needs	92%	88%	96%	90%	91%	92%	96%	91%	92%	93%	85%	95%	44%	92%	87%	89%	89%	95%	95%	93%	76%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	96%	94%	98%	90%	99%	93%	99%	96%	97%	95%	92%	97%	100%	97%	96%	92%	100%	96%	97%	97%	91%
Avoid the risk of homes & gardens being flooded with sewerage	96%	93%	98%	100%	93%	97%	99%	91%	99%	97%	95%	96%	100%	92%	100%	96%	88%	98%	98%	98%	87%
Managing the amount of water taken from the environment to supply customers	92%	88%	96%	90%	91%	91%	95%	91%	94%	90%	89%	93%	44%	89%	96%	88%	91%	93%	95%	92%	78%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	93%	87%	98%	90%	92%	92%	99%	91%	96%	91%	90%	94%	44%	92%	96%	96%	86%	94%	96%	95%	78%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q4. HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAR 2010? (SCALE 1-5)
(% who consider it important/very important)

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	82%	76%	88%	67%	89%	79%	78%	76%	83%	87%	82%	82%	100%	87%	75%	70%	81%	85%	91%	80%	59%
Ensuring a reliable & continuous water supply	84%	78%	89%	90%	91%	79%	78%	76%	85%	90%	84%	84%	100%	97%	75%	73%	84%	85%	91%	79%	78%
Ensuring the safety of tap water	85%	79%	90%	100%	91%	80%	78%	76%	87%	90%	84%	85%	100%	97%	80%	73%	84%	86%	91%	80%	82%
Managing the appearance, taste & smell of tap water	84%	81%	88%	91%	91%	80%	79%	78%	87%	88%	80%	86%	100%	89%	84%	77%	81%	86%	90%	82%	75%
Managing the pressure of water in your taps & the number of unplanned interruptions	80%	75%	85%	67%	87%	78%	74%	75%	81%	85%	80%	80%	100%	78%	75%	65%	78%	85%	89%	78%	59%
Handling customers' accounts, queries, complaints & customers with special needs	79%	74%	84%	67%	82%	79%	75%	68%	80%	89%	82%	78%	100%	92%	71%	62%	75%	83%	90%	76%	51%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	85%	80%	90%	100%	91%	80%	81%	78%	88%	89%	84%	85%	100%	92%	80%	82%	84%	86%	92%	81%	77%
Avoid the risk of homes & gardens being flooded with sewerage	83%	76%	89%	90%	86%	80%	78%	74%	85%	89%	82%	83%	100%	92%	75%	73%	75%	86%	91%	79%	66%
Managing the amount of water taken from the environment to supply customers	83%	76%	89%	76%	89%	79%	79%	76%	83%	89%	81%	83%	100%	89%	75%	82%	78%	84%	90%	79%	73%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	84%	76%	91%	90%	90%	79%	81%	76%	86%	90%	84%	84%	100%	97%	75%	82%	78%	85%	88%	80%	86%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Dee Valley Water Plc

3.3 Appeal of Individual Elements of Each Company Plan

Q5a. WHICH ELEMENTS OF **THE COMPANY PREFERRED STRATEGY** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	77%	74%	79%	57%	84%	73%	73%	69%	76%	85%	80%	76%	44%	75%	68%	82%	80%	77%	78%	75%	78%
Ensuring a reliable & continuous water supply	77%	75%	78%	57%	86%	71%	74%	67%	78%	85%	74%	77%	100%	83%	72%	82%	74%	76%	78%	75%	78%
Ensuring the safety of tap water	80%	78%	83%	67%	85%	80%	75%	69%	82%	91%	76%	81%	100%	83%	88%	82%	80%	78%	83%	79%	79%
Managing the appearance, taste & smell of tap water	75%	71%	80%	67%	80%	74%	71%	66%	76%	84%	72%	77%	44%	66%	92%	71%	74%	75%	78%	73%	73%
Managing the pressure of water in your taps & the number of unplanned interruptions	74%	71%	77%	57%	79%	72%	71%	63%	76%	82%	68%	76%	44%	58%	88%	74%	74%	74%	75%	72%	78%
Handling customers' accounts, queries, complaints & customers with special needs	71%	68%	74%	57%	75%	71%	66%	56%	74%	84%	67%	73%	44%	67%	88%	66%	71%	70%	77%	67%	71%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	76%	74%	79%	79%	79%	75%	74%	63%	79%	88%	72%	77%	100%	77%	75%	85%	77%	75%	80%	72%	78%
Avoid the risk of homes & gardens being flooded with sewerage	78%	77%	78%	66%	85%	76%	71%	66%	78%	89%	74%	78%	100%	80%	79%	82%	83%	75%	85%	73%	73%
Managing the amount of water taken from the environment to supply customers	75%	72%	78%	57%	77%	75%	74%	68%	75%	82%	75%	75%	44%	58%	88%	71%	77%	76%	75%	74%	78%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	74%	72%	75%	79%	75%	71%	75%	64%	76%	81%	83%	71%	44%	69%	79%	74%	74%	73%	75%	72%	74%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q6a. WHICH ELEMENTS OF **REFERENCE PLAN A** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	83%	78%	87%	80%	88%	81%	76%	75%	81%	93%	74%	86%	44%	86%	93%	82%	83%	80%	83%	81%	87%
Ensuring a reliable & continuous water supply	81%	76%	86%	80%	85%	81%	74%	72%	79%	92%	72%	83%	100%	86%	91%	78%	83%	78%	84%	78%	82%
Ensuring the safety of tap water	83%	78%	88%	80%	86%	83%	77%	74%	81%	94%	78%	84%	100%	94%	89%	82%	83%	80%	84%	81%	84%
Managing the appearance, taste & smell of tap water	78%	71%	83%	80%	82%	77%	69%	71%	73%	90%	72%	79%	100%	77%	83%	75%	80%	77%	79%	75%	79%
Managing the pressure of water in your taps & the number of unplanned interruptions	78%	75%	81%	70%	82%	79%	71%	70%	79%	86%	74%	80%	44%	77%	85%	70%	83%	78%	79%	76%	83%
Handling customers' accounts, queries, complaints & customers with special needs	76%	72%	80%	70%	81%	75%	68%	66%	78%	84%	67%	79%	44%	75%	82%	73%	83%	74%	80%	71%	83%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	80%	74%	85%	79%	80%	82%	74%	72%	78%	90%	70%	83%	44%	75%	78%	85%	83%	79%	81%	78%	78%
Avoid the risk of homes & gardens being flooded with sewerage	80%	75%	85%	79%	82%	82%	71%	73%	76%	91%	74%	82%	44%	77%	78%	78%	86%	79%	82%	78%	78%
Managing the amount of water taken from the environment to supply customers	79%	72%	86%	70%	84%	79%	74%	75%	76%	88%	76%	81%	44%	77%	85%	75%	80%	79%	77%	79%	83%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	79%	72%	85%	79%	84%	77%	72%	73%	78%	86%	83%	78%	44%	77%	78%	78%	83%	78%	81%	77%	82%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q7a. WHICH ELEMENTS OF **REFERENCE PLAN B** WOULD YOU LIKE TO SEE?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	81%	77%	85%	57%	87%	79%	78%	76%	79%	88%	70%	85%	44%	77%	85%	82%	83%	81%	80%	82%	78%
Ensuring a reliable & continuous water supply	79%	76%	83%	57%	86%	77%	75%	76%	76%	87%	68%	82%	100%	77%	80%	78%	83%	79%	80%	80%	73%
Ensuring the safety of tap water	84%	81%	88%	67%	89%	83%	83%	78%	83%	92%	76%	86%	100%	89%	86%	82%	88%	83%	84%	85%	79%
Managing the appearance, taste & smell of tap water	79%	74%	84%	67%	83%	79%	74%	74%	75%	90%	67%	82%	100%	75%	86%	75%	80%	80%	79%	80%	73%
Managing the pressure of water in your taps & the number of unplanned interruptions	78%	75%	81%	67%	83%	77%	73%	71%	79%	85%	66%	82%	44%	72%	87%	70%	83%	78%	76%	78%	82%
Handling customers' accounts, queries, complaints & customers with special needs	76%	72%	80%	57%	83%	74%	71%	71%	75%	82%	63%	80%	44%	73%	77%	73%	80%	76%	76%	75%	78%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	79%	73%	85%	79%	82%	79%	74%	74%	77%	87%	69%	82%	44%	77%	69%	85%	83%	79%	77%	80%	78%
Avoid the risk of homes & gardens being flooded with sewerage	80%	76%	84%	66%	84%	79%	77%	77%	77%	87%	70%	83%	44%	78%	73%	78%	86%	80%	80%	81%	73%
Managing the amount of water taken from the environment to supply customers	79%	74%	84%	57%	85%	77%	75%	79%	76%	83%	71%	82%	44%	69%	77%	75%	83%	81%	74%	82%	78%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	77%	73%	81%	79%	83%	75%	71%	74%	75%	83%	74%	79%	44%	77%	60%	78%	83%	79%	74%	80%	82%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q8. ARE THERE ANY SERVICE AREAS WHERE YOU WOULD LIKE TO SEE MORE OF AN IMPROVEMENT THAN THOSE PROPOSED IN ANY OF THESE PLANS?

	Total
Maintaining water pipes, treatment works & reservoirs	2%
Ensuring a reliable & continuous water supply	2%
Ensuring the safety of tap water	5%
Managing the appearance, taste & smell of tap water	8%
Managing the pressure of water in your taps & the number of unplanned interruptions	6%
Handling customers' accounts, queries, complaints & customers with special needs	2%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands & controlling smells from sewage works	9%
Avoid the risk of homes & gardens being flooded with sewerage	6%
Managing the amount of water taken from the environment to supply customers	1%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	3%
Upgrade water pipes	2%
(further) reduce sewerage drainage problems	2%
Introduce option of having a water meter	1%
(further) reduce sewerage treatment works smells	1%
Reduce chemical treatments in water supply	1%
Speed up process of repairs	2%
Reduce risk of floods	1%
Improve communication of water shutdown	1%
Improve quality of pipe repair workmanship	1%
Keep reserves of water	1%
No, none	63%
No of respondents	203

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

3.4 Perceived Value for Money of Each Plan

Q5b. HOW DOES **THE COMPANY PREFERRED STRATEGY** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	4%	5%	0%	3%	8%	2%	0%	5%	8%	0%	6%	0%	5%	0%	0%	0%	7%	9%	2%	0%
Very poor value	6%	10%	2%	10%	4%	5%	11%	7%	9%	3%	8%	6%	0%	6%	7%	14%	6%	5%	6%	7%	4%
Fairly poor value	11%	11%	12%	9%	13%	10%	10%	11%	12%	11%	7%	13%	0%	3%	7%	16%	3%	15%	13%	12%	4%
Neither poor nor good value	12%	13%	10%	24%	13%	13%	3%	17%	10%	7%	22%	9%	0%	11%	16%	0%	8%	14%	8%	10%	32%
Fairly good value	39%	32%	46%	28%	44%	35%	42%	31%	43%	44%	36%	39%	100%	51%	58%	41%	41%	32%	43%	37%	43%
Very good value	21%	20%	22%	29%	14%	25%	23%	29%	18%	15%	17%	22%	0%	18%	7%	22%	42%	18%	15%	24%	13%
Extremely good value	4%	6%	2%	0%	6%	4%	3%	2%	1%	10%	7%	3%	0%	5%	6%	8%	0%	4%	3%	5%	4%
Dont know/cant say	2%	4%	1%	0%	3%	0%	6%	4%	2%	2%	3%	2%	0%	0%	0%	0%	0%	5%	3%	3%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q6b. HOW DOES **REFERENCE PLAN A** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	5%	5%	4%	0%	3%	8%	3%	0%	6%	8%	1%	6%	0%	9%	0%	0%	0%	7%	9%	3%	0%
Very poor value	5%	6%	4%	10%	3%	5%	7%	5%	7%	2%	6%	5%	0%	3%	4%	14%	6%	3%	5%	5%	4%
Fairly poor value	9%	9%	9%	9%	11%	5%	14%	10%	11%	6%	6%	10%	0%	3%	12%	19%	0%	10%	14%	8%	4%
Neither poor nor good value	9%	10%	8%	10%	14%	7%	1%	11%	10%	5%	11%	8%	0%	5%	9%	0%	6%	12%	9%	8%	14%
Fairly good value	37%	35%	39%	32%	38%	37%	36%	35%	34%	43%	32%	38%	44%	40%	54%	30%	29%	37%	32%	35%	57%
Very good value	28%	26%	30%	38%	25%	29%	30%	31%	29%	24%	27%	28%	56%	34%	15%	33%	54%	21%	28%	29%	16%
Extremely good value	5%	7%	3%	0%	4%	7%	3%	4%	1%	10%	13%	3%	0%	5%	6%	3%	6%	5%	1%	8%	4%
Dont know/cant say	3%	2%	3%	0%	2%	1%	6%	4%	2%	2%	3%	3%	0%	0%	0%	0%	0%	5%	2%	4%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q7b. HOW DOES **REFERENCE PLAN B** RATE IN TERMS OF VALUE FOR MONEY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Extremely poor value	4%	3%	4%	0%	1%	8%	1%	0%	6%	5%	1%	5%	0%	5%	0%	0%	0%	6%	8%	2%	0%
Very poor value	8%	10%	6%	10%	9%	5%	8%	8%	9%	6%	4%	9%	0%	6%	7%	14%	6%	7%	9%	8%	4%
Fairly poor value	11%	11%	11%	9%	15%	5%	16%	16%	10%	7%	13%	11%	0%	3%	11%	19%	3%	13%	12%	12%	4%
Neither poor nor good value	10%	12%	8%	24%	6%	17%	0%	11%	7%	12%	12%	9%	0%	11%	16%	0%	3%	12%	8%	6%	32%
Fairly good value	42%	37%	47%	39%	46%	36%	45%	32%	47%	46%	37%	43%	44%	49%	50%	46%	41%	39%	41%	41%	43%
Very good value	19%	20%	19%	18%	16%	24%	17%	27%	17%	15%	22%	18%	56%	20%	11%	17%	48%	14%	19%	21%	13%
Extremely good value	4%	5%	3%	0%	4%	4%	5%	2%	1%	10%	7%	3%	0%	5%	6%	3%	0%	5%	1%	6%	4%
Dont know/cant say	2%	2%	3%	0%	2%	0%	8%	4%	3%	0%	4%	2%	0%	0%	0%	0%	0%	4%	2%	3%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Dee Valley Water Plc

3.5 Customers' Willingness to Pay for the Package of Services within each Proposed Plan

Q5c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN THE **COMPANY PREFERRED STRATEGY**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	16%	8%	0%	7%	17%	16%	12%	16%	8%	9%	13%	0%	11%	9%	10%	6%	15%	18%	9%	9%
Probably not willing to pay	14%	13%	15%	30%	19%	10%	8%	6%	15%	22%	13%	15%	0%	9%	12%	19%	3%	17%	16%	15%	8%
Probably willing to pay	46%	47%	46%	32%	47%	50%	39%	53%	39%	48%	51%	45%	44%	51%	47%	43%	49%	45%	39%	47%	68%
Definitely willing to pay	23%	21%	26%	38%	23%	18%	31%	24%	24%	21%	22%	23%	56%	29%	23%	27%	42%	17%	23%	25%	10%
Dont know/Cant say	4%	4%	5%	0%	3%	5%	6%	5%	6%	2%	4%	4%	0%	0%	8%	0%	0%	6%	4%	4%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q5d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN THE COMPANY PREFERRED STRATEGY?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	5%	6%	3%	0%	5%	7%	0%	0%	7%	5%	0%	6%	0%	0%	18%	0%	0%	5%	3%	7%	0%
Cost too much for improvements	49%	61%	34%	31%	38%	66%	37%	69%	56%	27%	79%	42%	0%	27%	49%	60%	100%	45%	51%	42%	76%
Cant afford it	40%	25%	59%	34%	53%	22%	57%	31%	24%	67%	7%	48%	0%	73%	33%	27%	0%	43%	42%	41%	24%
Dont know/Cant say	6%	8%	4%	35%	4%	4%	6%	0%	14%	0%	14%	4%	0%	0%	0%	13%	0%	6%	4%	9%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	53	29	25	3	20	21	9	12	23	18	10	44	0	4	4	7	3	35	25	24	4

Q6c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN A**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	10%	15%	6%	0%	5%	15%	13%	10%	13%	7%	9%	11%	0%	15%	4%	10%	6%	12%	17%	6%	9%
Probably not willing to pay	10%	9%	10%	30%	13%	5%	9%	3%	13%	13%	4%	11%	0%	5%	17%	23%	0%	9%	16%	6%	8%
Probably willing to pay	48%	50%	46%	43%	54%	47%	39%	48%	43%	53%	58%	45%	44%	46%	54%	40%	49%	49%	43%	49%	66%
Definitely willing to pay	29%	23%	35%	27%	24%	30%	36%	34%	26%	26%	26%	29%	56%	34%	23%	27%	45%	25%	22%	35%	17%
Dont know/Cant say	3%	4%	3%	0%	3%	3%	3%	5%	4%	0%	3%	3%	0%	0%	3%	0%	0%	5%	3%	4%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q6d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN A?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	3%	6%	0%	0%	0%	5%	7%	0%	7%	0%	10%	2%	0%	0%	0%	10%	0%	2%	3%	4%	0%
Cost too much for improvements	47%	55%	36%	31%	30%	67%	41%	76%	49%	25%	76%	42%	0%	27%	51%	54%	100%	43%	43%	45%	76%
Cant afford it	44%	33%	59%	34%	59%	28%	52%	24%	32%	75%	0%	51%	0%	73%	49%	24%	0%	48%	50%	39%	24%
Dont know/Cant say	6%	7%	5%	35%	11%	0%	0%	0%	13%	0%	14%	5%	0%	0%	0%	12%	0%	7%	4%	12%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	41	24	17	3	14	16	8	8	20	13	6	35	0	4	4	8	2	23	24	13	4

Q7c. WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN **REFERENCE PLAN B**?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Definitely not willing to pay	12%	15%	9%	0%	8%	17%	12%	15%	12%	8%	10%	12%	0%	11%	4%	10%	12%	14%	17%	7%	9%
Probably not willing to pay	16%	15%	16%	43%	19%	8%	18%	12%	17%	18%	18%	15%	0%	14%	18%	27%	0%	17%	14%	18%	13%
Probably willing to pay	45%	48%	43%	30%	50%	48%	31%	45%	39%	52%	46%	45%	44%	49%	47%	34%	52%	44%	45%	42%	63%
Definitely willing to pay	24%	19%	28%	27%	21%	22%	32%	24%	27%	20%	22%	24%	56%	25%	23%	29%	36%	19%	20%	30%	10%
Dont know/Cant say	4%	3%	5%	0%	2%	5%	6%	5%	5%	2%	4%	4%	0%	0%	8%	0%	0%	5%	4%	3%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q7d. WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN REFERENCE PLAN B?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Improvements not good enough	4%	4%	4%	0%	0%	8%	5%	0%	10%	0%	6%	4%	0%	0%	0%	9%	0%	4%	7%	2%	0%
Cost too much for improvements	53%	69%	30%	52%	54%	54%	47%	69%	55%	33%	73%	48%	0%	42%	80%	48%	100%	46%	51%	44%	82%
Cant afford it	36%	20%	57%	24%	42%	33%	37%	23%	27%	61%	0%	44%	0%	58%	20%	22%	0%	43%	38%	40%	18%
Dont know/Cant say	7%	6%	9%	24%	4%	5%	11%	8%	8%	6%	21%	4%	0%	0%	0%	22%	0%	6%	4%	13%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	53	30	23	4	19	20	11	16	21	16	9	43	0	5	5	9	3	31	23	23	5

Dee Valley Water Plc

3.6 Preferred Pace of Delivery

Q10a. HOW CONCERNED WOULD YOU BE IF SOME IMPROVEMENTS HAD TO BE DELAYED UNTIL AFTER 2010?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Not at all concerned	13%	19%	8%	10%	10%	15%	17%	13%	12%	16%	11%	13%	56%	14%	23%	15%	6%	13%	17%	11%	18%
Not very concerned	28%	30%	26%	33%	34%	20%	30%	27%	31%	25%	42%	24%	44%	28%	18%	33%	31%	28%	24%	33%	16%
Fairly concerned	28%	27%	29%	29%	26%	29%	32%	38%	25%	22%	34%	27%	0%	33%	29%	34%	31%	25%	20%	28%	51%
Very concerned	26%	20%	31%	19%	26%	30%	18%	19%	28%	29%	11%	30%	0%	19%	30%	14%	26%	28%	35%	22%	12%
Dont know/cant say	5%	3%	6%	9%	5%	5%	3%	3%	5%	7%	1%	6%	0%	5%	0%	3%	6%	6%	4%	6%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

Q10b. WHICH SERVICE AREAS WOULD CAUSE YOU MOST CONCERN IF THEY WERE DELAYED?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	20K	30K	30K+	DK	Rural	Sub	Urban
Maintaining water pipes, treatment works & reservoirs	8%	8%	9%	28%	5%	12%	4%	10%	8%	7%	5%	9%	0%	9%	13%	7%	21%	4%	8%	5%	25%
Ensuring a reliable & continuous water supply	9%	9%	8%	9%	7%	12%	6%	7%	12%	7%	4%	10%	0%	11%	12%	3%	17%	7%	8%	11%	0%
Ensuring the safety of tap water	25%	15%	35%	19%	23%	24%	36%	32%	18%	28%	26%	26%	0%	27%	28%	30%	23%	24%	11%	37%	27%
Managing the appearance, taste & smell of tap water	5%	1%	9%	10%	6%	4%	3%	3%	4%	7%	5%	5%	0%	3%	15%	0%	0%	5%	1%	8%	5%
Managing the pressure of water in your taps & the number of unplanned interruptions	1%	1%	0%	0%	1%	0%	1%	0%	2%	0%	1%	1%	0%	3%	0%	0%	0%	1%	0%	1%	0%
Handling customers' accounts, queries, complaints & customers with special needs	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Maintaining sewers & sewage treatment works, ensuring the network can meet new demands &	18%	12%	24%	20%	9%	28%	17%	29%	16%	9%	14%	20%	0%	6%	10%	22%	20%	21%	8%	27%	12%
Avoid the risk of homes & gardens being flooded with sewerage	8%	7%	9%	10%	10%	9%	1%	13%	7%	3%	1%	10%	0%	5%	6%	0%	6%	11%	8%	7%	7%
Managing the amount of water taken from the environment to supply customers	3%	4%	1%	0%	2%	2%	5%	4%	3%	0%	3%	2%	0%	3%	4%	5%	0%	2%	0%	1%	16%
Managing the effect of water company activities on the quality of rivers, wetlands & coastal waters	9%	7%	11%	0%	8%	9%	13%	13%	9%	5%	6%	10%	0%	3%	4%	18%	3%	11%	2%	11%	20%
No of respondents	203	99	104	9	77	79	38	65	75	63	43	158	2	21	20	24	29	108	75	102	23

3.7 Preferred Bill Profile

Q9. WHICH BILL OPTION WOULD YOU PREFER?

		Gender		Age				SEG			Water Meter?			Household Income					Location of property		
	Total	M	F	18-24	25-44	45-64	65+	AB	C	DE	Yes	No	DK	<10K	10-20K	20-30K	30K+	DK	Rural	Sub	Urban
Bills change every year according to amount of work	9%	7%	10%	9%	8%	12%	3%	5%	13%	7%	13%	8%	0%	8%	14%	10%	14%	6%	12%	8%	4%
Bills show one big change in first year	9%	10%	8%	18%	3%	10%	19%	6%	8%	13%	11%	9%	0%	13%	7%	9%	6%	9%	8%	11%	5%
Bills change steadily every year	82%	82%	82%	73%	89%	78%	78%	88%	78%	80%	76%	83%	100%	79%	78%	81%	79%	84%	79%	81%	91%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	201	98	102	9	77	79	36	64	73	63	43	155	2	21	20	24	29	107	73	101	23

4 Company Plans

	Service Area	Company Preferred Plan	Reference Plan A	Reference Plan B
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs:	Maintain current service (£11)	Maintain current service (£0)	Maintain current service (£0)
	2. Ensuring a reliable and continuous water supply	Maintain current service (£4)	Maintain current service (£3)	Maintain current service (£3)
	3. Ensuring the safety of tap water	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£0)	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£0)	Treatment works continue to meet current and future standards and no improvements other than maintenance required. Pipes and mains continue to provide water meeting current and future standards and no further improvements other than maintenance required (£0)
	4. Managing the appearance, taste and smell of tap water	75% fewer customer complaints about the appearance, taste or smell of tap water (£3)	75% fewer customer complaints about the appearance, taste or smell of tap water (£3)	75% fewer customer complaints about the appearance, taste or smell of tap water (£3)
	5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
SEWERAGE	7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£16)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£14)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£14)
	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of internal flooding from sewers at least once in ten years from 274 to 50, Reduce the number of properties at risk of internal flooding once in thirty years from 320 to 30. Reduce the number of properties externall (£2)	Maintain sewerage pipes and sewage treatment works. Ensure the network can meet new demands. Reduce odour problems from 88 sewage treatment works (£1)	Removal of all properties at risk of internal flooding from sewers at least once in thirty years and external flooding of the same severity (£3)
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	Maintain current service (£0)	Maintain current service (£0)	Maintain current service (£0)
	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	232 Km of rivers can better support fish, 224 Km of rivers can support rare wildlife, 6 designated bathing waters are improved (£18)	232 Km of rivers can better support fish, 224 Km of rivers and 0 Km2 of coastal waters can support rare wildlife, 0 wetlands and 0 lakes are improved and can support rare wildlife. (£17)	618 Km of rivers can better support fish, 224 Km of rivers and 0 Km2 of coastal waters can support rare wildlife, 0 wetlands and 0 lakes are improved and can support rare wildlife, 14 designated bathing waters are improved (£26)
		Overall cost, taking account of cost savings, on average bill by 2010 is £57 (excluding inflation). Overall bill by 2010 is £314 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £42 (plus inflation). Overall bill by 2010 is £300 (plus inflation)	Overall cost on average bill by 2010, taking account of cost savings, is £52 (plus inflation). Overall bill by 2010 is £309 (plus inflation)

Head Office
MVA House, Victoria Way, Woking, Surrey GU21 6DD
United Kingdom
Telephone 01483 728051 Facsimile 01483 755207

Edinburgh
Stewart House, Thistle Street, North West Lane
Edinburgh EH2 1BY United Kingdom
Telephone 0131 220 6966 Facsimile 0131 220 6087

Glasgow
Seventh Floor, 78 St Vincent Street, Glasgow G2 5UB
United Kingdom
Telephone 0141 225 4400 Facsimile 0141 225 4401

London
One Berners Street, London W1T 3LA
United Kingdom
Telephone 020 7612 3700 Facsimile 020 7436 9293

Manchester
26th Floor Sunley Tower, Piccadilly Plaza
Manchester M1 4BT United Kingdom
Telephone 0161 236 0282 Facsimile 0161 236 0095

Lyon
11 rue de la République, 69001 Lyon
France
Telephone +33 4 72 10 29 29 Facsimile +33 4 72 10 29 28

Paris
12-14 rue Jules César, 75012 Paris
France
Telephone +33 1 53 17 36 00 Facsimile +33 1 53 17 36 01

Bangkok
37/F Unit F, Payatai Plaza 128/405, 128 Phyatai Road
Thung-Phyatai, Rajthavee, Bangkok 10400, Thailand
Telephone +662 216 6652 Facsimile +662 216 6651

Beijing
60 South Lishi Road, Beijing 100045
China
Telephone +86 10 6805 2229 Facsimile +86 10 6805 6180

Hong Kong
Third Floor, East Town Building, 41 Lockhart Road, Wanchai
Hong Kong
Telephone +85 22 52 97 037 Facsimile +85 22 52 78 490

Manila
MVA Philippines Inc, Unit W-2205B West Tower, 22nd Floor, Philippines
Stock Exchange Centre, Exchange Road,
Ortigas Centre, Pasig City, Manila, Philippines
Telephone +632 637 8410 Facsimile +632 637 8140

Singapore
MVA Singapore Pte Ltd, 9 Raffles Place #27-01, Republic Plaza
Singapore 048619
Telephone +65 6832 5131 Facsimile +65 6532 4261

MVA is a SYSTRA Company
email: mail@mva.co.uk web: www.mva-group.com