In Association With:

WRc

Customer Research 2003: Periodic Review - National Report

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):	Martin Dix, Joanne Christensen, Simon Gordon Walker
Reviewer(s):	Martin Dix

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summary

Executive Summary

Background

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 investment should be made to maintain or improve the water environment, drinking water quality and customer service. These decisions need to take account of customers' views.

In preparation for setting price limits, each company submitted its Draft Business Plan to Ofwat in August 2003. The Draft Business Plan covers the period 2005 to 2010 and sets out the implications for customers' bills of each company's proposals. Each company's Draft Business Plan contains planned outputs and associated costs for each of three plans: Reference Plans A and B, that relate to programmes specified by Ofwat, and the Company Preferred Plan.

At the last review, in 1999, individual stakeholders undertook separate customer research. The different approaches and results were confusing. For this review, the Department for Environment, Food and Rural Affairs, Welsh Assembly Government, Ofwat, WaterVoice, Environment Agency, Drinking Water Inspectorate, English Nature, Wildlife and Countryside Link and the water companies through Water UK agreed to conduct joint research.

Study Objectives

The overall business objective on the research was to inform stakeholders and decision makers on customers' priorities for the water industry in England and Wales by providing:

- *"a better understanding of what combination of existing and potential service levels would best meet customers' requirements at a company level in the context of possible bill changes; and*

- *an overview of the company area findings, which analyses and draws conclusions at a national and regional level."*

For the purpose of these objectives the term "customers" has been used to cover all those who have an interest in water quality, water and sewerage services and the water environment.

MVA, in association with WRc, were commissioned to conduct the research. A large, national survey was undertaken in September and October 2003. A representative sample of more than 6,000 customers (90% bill-payers) was achieved.

The survey collected attitudinal information on current services and proposed future water and sewerage services, as defined in each water company's Draft Business Plan. Respondents were presented with information on current and proposed services using 'show cards' incorporating information compiled by Ofwat and the other regulators and agreed by the companies and Project Steering Group. These included details of proposed changes to current service levels, and their effects on bills. The information presented to respondents in each company area was specific to the company or companies responsible for supplying their water and sewerage services (i.e. to their Water and Sewerage Company, or Water only Company and Water and Sewerage Company).

The table below shows how the details of these plans varied widely between companies. The increase in overall bill implied by the 23 different Company Preferred Plans ranged from a minimum of £29 to a maximum of £172. For

Reference Plan B the variability in bill increase was even greater (from £24 to £204) whilst for Reference Plan A the range in bill increase was slightly narrower (from £19 to £148). For an individual service element, the greatest variation in bill increase was for 'Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters' within Reference Plan B. The price of the proposed output varied from £0 to £89.

Summary of the Range of Variation Between Service Delivery Plans

	Company Preferred		**Reference Plan A**		**Reference Plan B**	
	Min	**Max**	**Min**	**Max**	**Min**	**Max**
Change in Overall Average Bill (Actual and %)	£29[1] (+12%)	£172[2] (+74%)	£19[1] (+9%)	£148[2] (+63%)	£24[1] (+11%)	£204[2] (+87%)
Price Effects of Service Elements[3]:						
Maintaining water pipes, treatment works and reservoirs	£0	£37	£0	£32	£0	£33
Ensuring a reliable and continuous water supply	£0	£63	£0	£51	£0	£51
Drinking water quality- Ensuring the safety of tap water	£0	£21	£0	£23	£0	£23
Managing the appearance taste, and smell of tap water	£0	£5	£0	£5	£0	£8
Managing water pressure in your taps and the no. of unplanned interruptions	£0	£<1	£0	£3	£0	£3
Handling customers' accounts, complaints and customers with special needs	£0	£<1	£0	£2	£0	£2
Maintaining sewerage pipes & treatment works, meeting new demands and controlling smells from sewage works	£3	£66	£3	£53	£0	£70
Avoiding the risk of homes and gardens being flooded with sewage	£1	£9	£1	£8	£0	£17
Managing the amount of water taken from the environment to supply customers	£0	£2	£0	£5	£0	£11
Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	£2	£56	£0	£57	£0	£89

1 the minimum overall bill level is the lowest bill increase across the 23 companies. It is <u>not</u> the sum of the minimum increase in bill across the 23 companies for each individual element (usually £0)

2 the maximum overall bill level is the highest bill increase across the 23 companies. It is <u>not</u> the sum of the maximum increase in bill across the 23 companies for each individual element

3 the price effects for each service element are presented in terms of the minimum (and maximum) price increase proposed by any company. This shows the variation in the bill effect of the proposals put forward by different companies

Full details of the information presented to respondents in each company area are set out in the separate Company Report[1]. It should be remembered that the outputs and bill increases that customers were presented with were based upon individual company's <u>Draft</u> Business Plans and, therefore, may change for Final Business Plans.

Each company submitted three different plans. Customers only commented on the plans relevant to their own areas and it is important to note that national figures cover the overall response of customers to the plans they were presented with. As the findings at company level have been aggregated to give a national picture care

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

must be taken when interpreting customers' wishes for future water and sewerage services at an aggregated (regional and national) level. This is because each company starts from a different baseline position in terms of current service and price and makes proposals for a range of different outputs and costs. While the phrasing of the questions on the questionnaire was the same for all customers the showcard material was different. Planned output levels across the ten service elements vary considerably - from maintaining service to extensive improvements and from bill increases of £19 to increases of £204.

As the questions customers were asked were identical, as were the category headings of service on which they were asked to comment, findings at company level have been combined to give a national picture. However, due to the variation in the detailed content (ie different current service levels, proposed outputs and associated bill impacts) at company level, care must be taken when interpreting the (aggregated) results at regional and national level.

The report provides results and key findings across the companies nationally under a series of themes relating directly to the study objectives. For each theme, results are reported at a national level (ie for England and Wales combined and separately) and highlight variations at company level. We also identify any statistically significant variations by customer type and, where appropriate, across individual service elements.

Summary of Key Findings

In this report we have identified differences across companies and across different customer types nationally that are statistically significant at the 99% level. In the accompanying Company Report we have identified differences across different customer types within each company that are statistically significant at the 95% level.

Key findings were as follows.

Customer Current Satisfaction and Value for Money

Customers were presented with a description of current services supplied by their water and sewerage company(ies) and asked whether they were satisfied with the current service level. Results indicate that customers' satisfaction with their company's delivery of existing water and sewerage services is generally high.

The proportions of "fairly", "very" or "extremely satisfied" customers ranged from 67% to 89% in different company areas (with an average, nationally, of 79%). In contrast, between 4% and 18% of customers (with an average of 10%) were "fairly", "very" or "extremely dissatisfied".

After giving their level of satisfaction with current services, respondents were presented with the average bill level for their area alongside the description of the current service provision. They were then asked to rate their current water and sewerage services in terms of value for money.

Just over half (55%) of all customers, nationally, considered the current service to offer "fairly good", "very good" or "extremely good value for money". However, this proportion varied significantly across the companies, from 71% (average bill level of £257) to 37% (average bill level of £334). At three companies, less than 50% perceived current services to offer good value for money.

Overall, just under one in five customers in England (18%) considered their current service to offer "fairly poor", "very poor " or "extremely poor value for money". This proportion was significantly higher in Wales (24%). At company level, the percentage of customers who considered their service offered poor value for money ranged from 11% (Wessex Water) to 42% (South West Water).

At only one company was the current service considered to offer poor value for money by more customers than thought it offers good value for money.

Importance of Maintaining Services

Customers were asked how important they felt it was to maintain their current service level, for each of the ten service elements, in turn, rather than have it reduced. At this stage of the interview, there was no reference to associated costs. Customers attached very high importance to maintaining the current levels of all areas of service delivery, and not allowing them to deteriorate. This high level of importance is consistent across all companies.

Although the importance attached to maintaining the current service was high across all service areas, some were considered significantly more important than others, nationally:

- *maintaining water quality – ensuring the safety of drinking water* and *ensuring a reliable and continuous supply of water* were reported as significantly more important than any other service area listed (95% of all customers said that maintaining these service elements is important or very important);

- *maintaining water pipes, treatment works and reservoirs* (92%), *avoiding the risk of homes and gardens being flooded with sewage*, *managing the appearance, taste and smell of tap water*, and *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* (all 91%) were rated the next most important areas to be maintained, by customers nationally;

- *managing the pressure of water in your taps and the number of unplanned interruptions* was the next most important aspect of service delivery, nationally, to be maintained (90% of customers considered this important or very important);

- though still important to an overall majority of customers, the environment services *managing the amount of water taken from the environment to supply customers* (87%) and *managing the effect of water company activities on rivers, wetlands and coastal waters* (87%) had significantly lower support when compared to the other existing service elements; and

- though still important to an overall majority of customers, *handling customers' accounts, complaints and customers with special needs* (83%) had significantly lower support to maintain than the others (except in Wales, where 95% of customers wanted the current service level to be at least maintained).

Drinking water quality – ensuring the safety of tap water was one of the two most important services customers wished to see maintained at 22 of the 23 companies. Generally, this service was rated as the most important to be maintained, though for customers at two companies the priority was *ensuring a reliable and continuous supply of water*. And customers of two other companies gave their priority to *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works.*

At the one company where priorities were very different, customers were most keen to see *handling customers accounts, complaints and customers with special needs* and *managing the pressure of water in your taps and the number of unplanned interruptions* being maintained.

Importance of Improving Services

When asked to consider the importance of improving each service element (again with no reference to cost), most customers expressed strong support for improvements in all service areas. Indeed, the proportion that wanted even the least important service aspect to be improved still represents a majority of all customers (62%). However, customers do not attach as much importance to improvements as they do to maintaining current service levels.

Most customers felt that it was either "important" or "very important" to improve all current service levels (over 50% for all elements at a national and regional level).

The importance of improving each service, for customers across all 23 companies, was as follows (in descending order of relative importance):

- *managing the appearance, taste and smell of tap water* (81%);
- *drinking water quality – ensuring the safety of tap water* (76%);
- *avoiding the risk of homes and gardens being flooded with sewage* and *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* (74-73%);
- *ensuring a reliable and continuous water supply*, *managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters*, *maintaining water pipes, treatment works and reservoirs* and *managing the amount of water taken from the environment to supply customers* (72-71%);
- *managing the pressure of water in taps and the number of unplanned interruptions* (69%); and
- *handling customers' accounts, complaints and customers with special needs* (62%).

Improvements to *managing the appearance, taste and smell of tap water* were considered significantly more important than improvements to any other service element. *Drinking water quality – ensuring the safety of tap water* was the second most important element. For 22 of the 23 water companies, these two service elements were always in the 'top five' for improvements and supported by two-thirds or more of all customers.

For most companies, around two-thirds of customers wanted improvements in *managing the amount of water taken from the environment to supply customers* and *managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters*. However, there was considerable variation in support across the companies, ranging from 37% to 91% of customers (with an average of 71%).

Improving *handling customers accounts, complaints, and customers with special needs* was considered the least important aspect to improve. It was given significantly least priority of all, nationally.

This pattern of priorities was broadly similar across most of the companies.

Appeal of Individual Elements of Each Plan

Respondents were informed that their water and sewerage company(ies) was considering plans that proposed a number of key changes to service provision. Each of the three Draft Business Plans (Company Preferred, Reference Plan A, Reference

Plan B) were presented to respondents in the form of service level descriptions including proposals for both improvement and maintaining current service levels and bill impacts. Respondents were then asked which, if any, of these proposed service outputs they would like to see included in future service provision. The procedure was repeated three times, once each for plan.

In the results that follow, we report the responses of customers to the specific proposals that they were presented with (ie at company level) and we have also aggregated the findings to provide overall national average messages. When interpreting these national findings, it must be remembered that different services and proposed outputs and bill increases apply across the companies.

The results showed that between 42% and 45% of customers, nationally, wanted to see all of the elements in each of the plans put forward by their company. A further 37-38% of customers wished to see some of them and 17-20% wanted to see none. Across the companies, between 31% and 74% of customers selected all of the elements in each of the plans. Whilst 19-52% of customers wished to see some of them and 7-26% wanted to see none. Support for all or some of the elements of the plans should be borne in mind when considering the differences between individual service aspects.

The area of service delivery most customers wanted to see was *drinking water quality - ensuring the safety of tap water* (around 70% for each plan). For the majority of companies, this service element was proposed at an improved level and at an additional cost. Indeed, this area of service delivery was found to:

- be the most important to maintain;
- be the most important to improve;
- have the most support within each of the three plans presented to respondents;
- have the most support for further improvement, beyond that defined within the proposals presented; and
- be the aspect of greatest concern if there were delays in delivery in order to keep costs down.

Customer support for maintaining and improving the safety of tap water does not appear to be greatly affected by the associated cost. The cost of the companies' differing service delivery outputs range from £0 to £21 for the Company Preferred Plan, and £0 to £23 for each of Reference Plans A and B.

Managing the appearance, taste and smell of tap water and *ensuring reliable continuous supply* were rated as the next most important service elements to be included in any of the three plans presented to respondents. Between 48-88% of customers (with an average of 64%) wanted to see their company introduce the proposed level of *managing the appearance, taste and smell of tap water* (for which improvements were, typically, proposed with associated bill increases - between £0 and £3). And between 49-85% (with an average of 62%) of customers wanted to see the proposed level of *ensuring a reliable and continuous water supply* (for which maintaining standards was, typically, proposed at a cost of between £10 and £20).

However, when maintenance of *ensuring a reliable and continuous water supply* was offered at substantially higher cost, demand for the proposed output declined considerably. Similarly, interest in *managing the appearance, taste and smell of tap water* was reduced (ranked 4th or 5th) when the cost of improvements rose.

Across the three plans presented to respondents, between 39% and 90% said they wanted to see their company introduce the following services, with their associated outputs and costs:

- *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* (improvements ranging from £3-£70 for the majority of plans);

- *maintaining water pipes, treatment works and reservoirs* (typically maintaining current service, ranging from £0-£37);

- *avoiding the risk of homes and gardens being flooded with sewage* (typically improvements ranging from £1-£9); and

- *managing the pressure of water in your taps and the number of unplanned interruptions* (typically maintaining current service, ranging from £0-£5);

The average proportions nationally wanting to see improvements in these four services were, respectively, 59%, 59%, 57% and 57%.

Service elements wanted by fewer customers, though still, in most cases, the majority (49-55%) across all companies were:

- *managing the amount of water taken from the environment to supply customers* (52-55% for, typically, maintaining the current service, ranging from £0-£11);

- *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* (49-55% for, typically, improvements, ranging from £0-£89); and

- *handling customers' accounts, queries, complaints and customers with special needs* (52-54% for, typically, maintaining the current service, ranging from £0-£2).

The average proportions nationally wanting to see improvements in these three services were, respectively, 54%, 52% and 53%.

Value for Money of Each Plan

Each plan included an overall average bill increase for the 'combined' set of planned outputs. The planned outputs and costs that were presented to each respondent varied across the three plans and for each company. The bill increase ranged from an additional £29 to an increase of £204 and the number of service levels to be improved ranged from four to seven. Customers were asked whether they thought that each of the three plans that they were presented with offered good or poor value for money

At a national level, 45% of customers considered that their Company's Preferred Plan represented "extremely", "very" or "fairly good value for money". Similarly, 46% of customers considered that their company's Reference Plan A represented (extremely, very or fairly) good value for money, whilst a significantly lower proportion (37%) thought this about Reference Plan B. In contrast, and as indicated above, 55% of customers thought their <u>current</u> service offers "extremely", "very" or "fairly good value for money".

The proportions that thought their company's Preferred Plan and Reference Plan A represented "extremely", "very" or "fairly poor value for money" were around 30%, in each case. Customer reactions to Reference Plan B, overall, were generally more negative. Some 40% of customers considered their company's Reference plan B to offer "extremely", "very" or "fairly" poor value for money. And more customers nationally considered their Reference Plan B to offer poor value for money than held the opposite view. Between one in ten and one in three customers (9-31%, with an average of 20%) said the plans that they were presented with offer "neither poor nor good value for money", or were otherwise undecided.

Customers of all but one company felt that Reference Plan B offered poorer value for money than Reference Plan A or the Company Preferred Plan. Only at one company did customers say that their Reference Plan B offers better value for money than the Company Preferred Plan. For this company, the bill for Reference Oplan B was lower than for the Company Preferred Plan.

For 20 of the 23 companies, the proportion of customers who said that their current services provide good value for money exceeded the proportions who said that any of the three plans offered good value for money.

Willingness to Pay for each Plan

Customers were asked to say how willing they would be to pay the amounts stated for the proposed changes in each plan that they were presented with (Company Preferred Plan, Reference Plan A, Reference Plan B). Those who said that they would be "definitely" or "probably" unwilling to pay were then asked a further question, to identify reasons for this view.

Overall, customers were more willing to pay for the Company Preferred Plan or Reference Plan A than Reference Plan B:

- Nationally, 46% of customers were probably willing and 14% of customers definitely willing to pay for Company Preferred Plan. 19% were probably not, and 14% definitely not willing to pay;
- Nationally, 46% of customers were probably willing and 14% definitely willing to pay for Reference Plan A. 20% were probably not, and 14% definitely not willing to pay; and
- Nationally, 41% of customers were probably willing and 12% definitely willing to pay for Reference Plan B. 22% were probably not, and 19% definitely not willing to pay.

For each of the three plans, across the 23 companies, the percentage of customers who were definitely willing to pay varied from around one in every 20 customers (3-5%) to more than one in four (25-29%).

In only one company did the proportion of customers <u>not</u> willing to pay for the Company Preferred Plan exceed the proportion who were. This compares with two companies in relation to the Reference Plan A. In ten company areas, the proportion of customers not willing to pay for Reference Plan B exceeded the proportion of customers who were willing-to-pay.

Customers' willingness to pay decreased as bill levels increased (both in absolute monetary terms and percentage terms). There was no relationship between customers' willingness to pay and the number of service improvements within each plan presented.

Customers on low incomes, in socio-economic categories D/E, and/or living in rural areas were least willing to pay for any of the company plans that they were presented with.

The majority of customers who indicated that they were probably or definitely not willing to pay for the plans said that this was because the improvements presented were not good enough compared with the cost, or that they could not afford it.

Just under one in every ten customers (9%) indicated that they were unable to afford any of the three plans that they were presented with. These customers were often from low income households, in socio-economic category D/E and elderly.

Concern over Delay in Delivery

Customers were asked to say how concerned they would be if the changes proposed by their company in the three different service plans were delayed until after 2010 in order to keep bills down or to meet other priorities. Two in every five customers (40%), nationally, were "fairly", or "very", concerned over delay in delivery; whilst 50% were "not very", or "not at all", concerned.

Customers were divided on the degree to which they were concerned over service delivery delays beyond 2010. At company level, the degree of concern ranged from 7% to 27% who would be very concerned; and 19% to 45% who would be fairly concerned.

When asked which service areas would cause most concern if delayed, drinking water quality was the top concern for customers of all companies. This was followed by delays in *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works*.

There was less concern over delays in *managing the pressure of water in your taps and the number of unplanned interruptions; managing the amount of water taken from the environment to supply customers*; and *handling customers' accounts, queries, complaints and customers with special needs*.

Preferred Bill Profile

Customers were told bills are likely to change during the period 2005–2010 and whilst the overall bill total would remain the same, there could be several ways in which this cost could be incurred by customers. Respondents were shown a number of different 'bill profiles' and asked which one they would prefer.

Over three quarters (78%) of customers, nationally, stated that they would prefer to see "bills change steadily every year throughout the period so that customers do not see big changes from year to year".

This was the preference of the majority of customers for each company. Indeed, some two-thirds of customers in each company expressed a preference for bills to change steadily every year throughout the period. This preference ranged from 67% to 88%.

Non Bill Payers

Views of non-bill payers generally reflected those of customers nationally, although non-bill payers were more likely to be uncommitted to any particular point of view. This applied to their assessments of value for money for current and proposed services, their willingness to pay for the plans, their current satisfaction levels and concern for delays. (It should be noted that the non bill-payers sample comprised small sub-samples from across the regions and will have been presented with very different company information).

Customers on Low Household Incomes

Views of customers with a low household income (less than £10,000/annum) were broadly similar to the other customers nationally. Where their views differed most (statistically) was in their assessments of value for money and willingness to pay. The proportion of customers that rated current and proposed services as 'poor value for money' declined with household income. Indeed, twice as many customers on less than £10,000/annum rated their current service as poor value for money than those on incomes of more than £30,000/annum (24% vs. 12%). And low income customers were more likely to consider the proposed plans that they were presented with as offering poor value for money (36%-47%) compared with customers on higher incomes (23%-31%).

Similarly, customer willingness to pay for the proposed plans reduces in line with income. On average, 43% - 52% of low income customers indicated that they were '**not** willing to pay' for the three plans that they were presented with (based on the average bill for their company area), compared with 25%-34% amongst higher income customers (more than £30,000/annum). Not surprisingly, low income customers were more likely than those with higher incomes to state that they were unable to afford the proposed bill increases indicated in the plans. 38% of customers who said they could not afford to pay for the plans were from low income households. This is disproportionately high when compared with just 14% of customers overall who are in this low income category.

Rural Customers

Views of rural customers were broadly similar to the national findings. Where these views differed most was in their importance ratings for improvements, preferences to see proposed outputs in the plans, and their willingness to pay. Between 2% and 6% more rural dwellers considered it important to introduce improvements to each service element before 2010 than customers in more urban environments. However, when presented with associated costs, rural dwellers were approximately 10% less likely than urban dwellers to want to see the proposed outputs (43%-65% compared to 57%-74%). Rural customers were also more likely to be '**not** willing to pay' for the bill increases as set out in the proposed plans (35%-43%) than customers in more urban areas (28%-35%).

Company Conclusions

Below we provide a summary of findings on customer views for each company in turn. A comprehensive account of the responses of customers in each company area to all the questions in this survey is provided in MVA's accompanying report.

Anglian Water [Section 1, Company Report, MVA 2003] customers were satisfied with current services (77%) and considered them to offer good value for money (54%). Customers wanted to see current services at least maintained at existing levels. A larger proportion of customers thought the Company Preferred Plan offered poor value for money (45%) than good (34%). The proportion of customers 'willing to pay' was 40% probably willing, 7% definitely willing for Reference Plan B, 47% probably willing, 5% definitely willing for the Company Preferred Plan and 46% probably willing, 8% definitely willing for Reference Plan A.

The top three service elements supported by customers were 'ensuring the safety of tap water' (60%-63%), 'managing the appearance, taste and smell of tap water' (55%-58%) and 'ensuring a reliable and continuous water supply' (54%- 56%). There were key differences from the national picture with respect to customers' perceived value for money of, and willingness to pay for, the three plans.

Cambridge Water [Section 2, Company Report, MVA 2003] customers were satisfied with current services (83%) and considered the services to offer good value for money (51%). Customers wanted to see current services at least maintained at existing levels. More Cambridge Water customers thought the Company Preferred Plan offered poor value for money (38%) than good (26%). 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%). The top three service elements supported by customers were 'managing the appearance, taste and smell of tap water' (77%-82%), 'ensuring the safety of tap water' (75%-79%), and 'ensuring a reliable, continuous water supply' (75% to 78%). There were key differences from the national picture with respect to customers' satisfaction with current levels of service and their perceived value for money for the three plans.

Essex and Suffolk Water [Section 3, Company Report, MVA 2003] customers were satisfied with current services (78%) and about half considered them to offer good value for money). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (45%) than poor (30%). The proportions of customers 'willing to pay' was 47% probably willing, 3% definitely willing for Reference Plan B, 46% probably willing, 7% definitely willing for Company Preferred Plan and 49% probably willing, 7% definitely willing for Reference Plan A. The top three service elements supported by customers were 'ensuring the safety of tap water' as the top priority (69%-71%), 'avoiding the risk of homes and gardens being flooded with sewage' (63%-65%) and 'ensuring a reliable and continuous water supply' (61%-65%). There were key differences from the national picture with respect to customers' willingness to pay for the Company Preferred Plan.

Tendring Hundred Water [Section 4, Company Report, MVA 2003] customers were satisfied with current services (83%) and considered the service good value for money (54%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (50%) than poor (25%). The percentage of customers 'willing to pay' was 52% probably willing, 10% definitely for Reference Plan A; 47% probably willing, 12% definitely willing for the Company Preferred Plan; and 44% probably willing, 9% definitely willing for Reference Plan B). The top three service elements supported by customers were 'ensuring the safety of tap water' (69% -77%), 'managing the appearance, taste and smell of tap water' (63%-70%), 'ensuring a reliable and continuous water supply' (62%-70%). There were no key differences from the national picture.

Northumbrian Water [Section 5, Company Report, MVA 2003] customers were satisfied with current services (79%) and considered them to offer good value for money (62%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (51%) than poor (21%). The proportion of customers indicating they were 'willing to pay' was 52% probably willing, 11% definitely willing for the Company Preferred Plan; 47% probably willing, 13% definitely willing for Reference Plan A and 45% probably willing, 9% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (69%-77%), 'managing the appearance, taste and smell of tap water' and 'ensuring a reliable and continuous water supply'

(67%-69%). There were key differences from the national picture with respect to customers' perceived value for money of current services and the Company Preferred Plan and Reference Plan A.

Southern Water [Section 6, Company Report, MVA 2003] customers were satisfied with current services (82%) and considered them to offer good value for money (60%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered poor value for money (38%) than good (34%). The proportion of customers indicating they were 'willing to pay' was 40% probably willing, 10% definitely willing for the Company Preferred Plan; 31% probably willing, 7% definitely willing for Reference Plan A and 22% probably willing, 5% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensure the safety of tap water' (68%-80%), 'ensuring a reliable and continuous water supply' (49% -66%) and 'managing the appearance, taste and smell of tap water' (51% to 64%). There were key differences from the national picture with respect to customers' perceived value for money of, and willingness to pay for, the three plans.

Folkestone and Dover Water [Section 7, Company Report, MVA 2003] customers were satisfied with current services (70%) and considered them to offer good value for money (55%). Customers wanted to see current services at least maintained at existing levels. A greater proportion of Folkestone and Dover Water customers thought the Company Preferred Plan offered poor value for money (42%) than good value for money (27%). The proportion of customers indicating they were 'willing to pay' was 48% probably willing, 7% definitely willing for the Company Preferred Plan; 45% probably willing, 7% definitely willing for Reference Plan A and 36% probably willing, 6% definitely willing for Reference Plan B). The top three service elements supported by customers were 'ensure the safety of tap water' (90%-91%), 'maintain water pipes, treatment works and reservoirs' (89%-90%) and 'manage the appearance, taste and smell of tap water' (88%). There were key differences from the national picture with respect to customers' perceived value for money of, and willingness to pay for, future services as proposed in the plans presented.

68% of **Mid Kent Water [Section 8, Company Report, MVA 2003]** customers were satisfied with current services and 55% considered them to offer good value for money. Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (44%) than poor (37%). The proportion of customers indicating they were 'willing to pay' was 43% probably willing, 10% definitely willing for the Company Preferred Plan; 43% probably willing, 10% definitely willing for Reference Plan A and 33% probably willing, 7% definitely willing for Reference Plan B. This proportion was the same (53%) for Reference Plan A and considerably less (40%) for Reference Plan B. The top three service elements supported by customers were 'ensure the safety of tap water' (73%-78%), '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%). There were key differences from the national picture with respect to customers' perceived value for money of the two Reference Plans, and willingness to pay for the Company Preferred Plan and the two Reference Plans.

Portsmouth Water [Section 9, Company Report, MVA 2003] customers were satisfied with current services (77%) and considered them to offer good value for money (55%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (51%) than poor (25%). The proportion of customers indicating they were 'willing to pay' was 53% probably willing, 9% definitely willing for the Company Preferred Plan; 52% probably willing, 7% definitely willing for Reference Plan A and 35% probably willing, 4% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (67% to 71%), 'managing the appearance, taste and smell of tap water' (61% to 66%) and 'ensure a reliable and continuous water supply' (58% to 67%). There were key differences from the national picture with respect to customers' perception of Reference Plan B in terms of value for money and, accordingly, the proportion of customers willing to pay for this plan.

73% of **South East Water [Section 10, Company Report, MVA 2003]** customers were satisfied with current services and 46% considered them to offer good value for money. Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (46%) than poor (35%). The proportion of customers indicating they were 'willing to pay' was 35% probably willing, 27% definitely willing for the Company Preferred Plan; 33% probably willing, 28% definitely willing for Reference Plan A and 33% probably willing, 20% definitely willing for Reference Plan B. The top three service elements supported by customers were 'avoid the risk of homes and gardens being flooded with sewage' (63%-67%), 'ensure the safety of tap water' (63%-66%) and 'ensuring a reliable and continuous water supply' (62%-65%). There were key differences from the national picture with respect to customers' perception of Reference Plan B in terms of value for money and, accordingly, the proportion of customers willing to pay for this plan.

Severn Trent Water [Section 11, Company Report, MVA 2003] customers were satisfied with current services (77%) and considered them to offer good value for money (57%). Customers wanted to see current services at least maintained at existing levels. Many more customers thought the Company Preferred Plan offered good value for money (53%) than poor (25%). The proportion of customers indicating they were 'willing to pay' was 44% probably willing, 18% definitely willing for the Company Preferred Plan; 45% probably willing, 18% definitely willing for Reference Plan A and 40% probably willing, 19% definitely willing for Reference Plan B. The top three service elements supported by customers were '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%) There were key differences from the national picture with respect to customers' perception of all three plans, in terms of value for money, and the proportion of customers willing to pay for Reference Plan B.

South Staffordshire Water [Section 12, Company Report, MVA 2003] customers were satisfied with current services (80%) and considered them to offer good value for money (57%). Customers wanted to see current services at least maintained at existing levels. Most customers thought the Company Preferred Plan offered good value for money (63%) and just 20% regarded it as poor value for money. The proportion of customers indicating they were 'willing to pay' was 57% probably willing, 19% definitely willing for the Company Preferred Plan; 58% probably willing, 16% definitely willing for Reference Plan A and 56% probably willing, 12% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensure a reliable and continuous water supply' (78% - 82%), '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%). There were key differences from the national picture with respect to customers' perceived value for money of, and willingness to pay for, the proposed future services as presented to respondents.

South West Water [Section 13, Company Report, MVA 2003] customers were satisfied with current services (77%) and yet just 37% considered them to offer good value for money -less than the 42% who considered current services to offer poor value for money. Customers wanted to see current services at least maintained at existing levels. The Company Preferred Plan would result in the lowest increase in bills. It was the best supported plan but even so, half (50%) of customers thought the Company Preferred Plan offered poor value for money and just 29% considered the plan to offer good value for money. The proportion of customers indicating they were ‘willing to pay’ was 40% probably willing, 6% definitely willing for the Company Preferred Plan; 38% probably willing, 3% definitely willing for Reference Plan A and 32% probably willing, 4% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensure the safety of tap water' (63%-64%), 'ensure a reliable and continuous water supply' (57%-59%) and 'maintaining water pipes, treatment works and reservoirs' (57%-59%). There were key differences from the national picture with respect to customers’ perceived value for money of, and willingness to pay for, the proposed future services as presented to respondents.

Thames Water [Section 14, Company Report, MVA 2003] customers were satisfied with current services (81%) and considered them to offer good value for money (56%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (42%) than poor (22%). The proportion of customers indicating they were ‘willing to pay’ was 54% probably willing, 14% definitely willing for the Company Preferred Plan; 52% probably willing, 16% definitely willing for Reference Plan A and 53% probably willing, 12% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (72% to 74%), 'managing the appearance, taste and smell of tap water' (63%-65%) and 'maintaining water pipes, treatment works and reservoirs' (62%-65%).
There were key differences from the national picture in the proportion of customers willing to pay for all three plans.

Sutton and East Surrey [Section 15, Company Report, MVA 2003] customers were satisfied with current services (80%) and 68% considered them to offer good value for money. Customers wanted to see current services at least maintained at existing levels. Considerably more customers thought the Company Preferred Plan offered good value for money (60%) than poor (16%). The proportion of customers indicating they were ‘willing to pay’ was 55% probably willing, 18% definitely willing for the Company Preferred Plan; 51% probably willing, 13% definitely willing for Reference Plan A and 44% probably willing, 10% definitely willing for Reference Plan B. Fewer (64% and 54%) were willing to pay for Reference Plan A and B. The top three service elements supported by customers were 'ensuring the safety of tap water' (67%-79%), 'maintaining water pipes, treatment works and reservoirs' (67%-73%) 'manage the appearance taste and smell of tap water (66%-72%). There were key differences from the national picture with respect to customers’ perceived value for money of current and future services, as presented to respondents, and their willingness to pay for them.

Three Valleys Water [Section 16, Company Report, MVA 2003] customers were satisfied with current services (78%) and considered them to offer good value for money (56%). Customers wanted to see current services at least maintained at existing levels. Slightly more customers thought the Company Preferred Plan offered good value for money (34%) than poor (32%). The proportion of customers indicating they were ‘willing to pay’ was 48% probably willing, 12% definitely willing for the Company Preferred Plan; 57% probably willing, 10% definitely willing for Reference Plan A and 56% probably willing, 13% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (62%-64%), 'managing the appearance, taste and smell of tap water' (60%-62%), 'maintaining sewers, sewage treatment works, ensuring the network meets new demands and controlling smells from sewage works' (55%-58%). There were key differences from the national picture with respect to customers’ perceived value for money of the Company Preferred Plan and Reference Plan B, and customers’ willingness to pay for Reference Plans A and B.

United Utilities Water [Section 17, Company Report, MVA 2003] customers were satisfied with current services (74%) and considered them to offer good value for money (56%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered poor value for money (38%) than good (34%). The proportion of customers indicating they were 'willing to pay' was 40% probably willing, 10% definitely willing for the Company Preferred Plan; 40% probably willing, 12% definitely willing for Reference Plan A and 31% probably willing, 11% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (68% to 71%), 'managing the appearance, taste and smell of tap water' (61%-66%) and 'ensuring a reliable and continuous water supply' (63%-65%). There were key differences from the national picture with respect to customers' perceived value for money of, and willingness to pay for, the proposed future services as presented to respondents.

Wessex Water [Section 18, Company Report, MVA 2003] customers were satisfied with current services (87%) and considered them to offer good value for money (61%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (55%) than poor (20%). The proportion of customers indicating they were 'willing to pay' was 56% probably willing, 15% definitely willing for the Company Preferred Plan; 54% probably willing, 16% definitely willing for Reference Plan A and 38% probably willing, 10% definitely willing for Reference Plan B. The top three service elements supported by customers were '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%). There were key differences from the national picture in the proportion of customers who were satisfied with current levels of service and regarded it good value for money, those who thought each plan was good value for money, and those who were willing to pay for these plans.

Bournemouth and West Hampshire Water [Section 19, Company Report, MVA 2003] customers were satisfied with current services (78%). Just 39% considered services to offer good value for money. Customers wanted to see current services at least maintained at existing levels. A greater proportion of Bournemouth and West Hampshire Water customers thought the Company Preferred Plan offered poor value for money (37%) than good value for money (35%). The proportion of customers indicating they were 'willing to pay' was 51% probably willing, 8% definitely willing for the Company Preferred Plan; 48% probably willing, 5% definitely willing for Reference Plan A and 40% probably willing, 6% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (69% -73%), 'managing the appearance, taste and smell of tap water' (61%-66%), 'avoiding the risk of home and gardens being flooded with sewage' (59% -65%). There were key differences from the national picture with respect to customers' perceived value for money for current and future services as proposed in the plans presented.

Bristol Water [Section 20, Company Report, MVA 2003] customers were satisfied with current services (74%) and considered them to offer good value for money (53%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (59%) than poor (18%). The proportion of customers indicating they were 'willing to pay' was 45% probably willing, 25% definitely willing for the Company Preferred Plan; 52% probably willing, 23% definitely willing for Reference Plan A and 48% probably willing, 25% definitely willing for Reference Plan B. The top three service elements supported by customers were '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 'managing the appearance, taste and smell of tap water' (68%-69%). There were key differences from the national picture in the proportion of customers who were satisfied with current levels of service, those who thought each plan was good value for money, and those who were willing to pay for these plans.

Yorkshire Water [Section 21, Company Report, MVA 2003] customers were satisfied with current services (83%) and considered them to offer good value for money (63%). Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (56%) than poor (24%). The proportion of customers indicating they were 'willing to pay' was 43% probably willing, 25% definitely willing for the Company Preferred Plan; 48% probably willing, 20% definitely willing for Reference Plan A and 32% probably willing, 12% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (68%-71%), 'maintain sewers and sewage works, ensuring the network can meet new demands and controlling smells from sewage works' (64%-66), 'ensuring reliable and continuous water supply' (62%-64%). There were key differences from the national picture with respect to customers' perceived value for money of, and willingness to pay for, the proposed future services as presented to respondents.

Dŵr Cymru Water [Section 22, Company Report, MVA 2003] customers were satisfied with current services (89%), and 52% considered them to offer good value for money. Customers wanted to see current services at least maintained at existing levels. More customers thought the Company Preferred Plan offered good value for money (46%) than poor (31%). The proportion of customers indicating they were 'willing to pay' was 45% probably willing, 13% definitely willing for the Company Preferred Plan; 45% probably willing, 14% definitely willing for Reference Plan A and 36% probably willing, 13% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (54%-62%, 61%), 'managing the appearance taste and smell of tap water' (48%-57%) and 'ensuring a reliable and continuous water supply' (49%-54%). There were key differences from the national picture in the proportion of customers who were satisfied with the current level of service.

Dee Valley Water [Section 23, Company Report, MVA 2003] customers were satisfied with current services (87%) and considered them to offer good value for money (71%). Customers wanted to see current services at least maintained at existing levels. Most customers thought the Company Preferred Plan offered good value for money (64%) than poor (21%). The proportion of customers indicating they were 'willing to pay' was 46% probably willing, 23% definitely willing for the Company Preferred Plan; 48% probably willing, 29% definitely willing for Reference Plan A and 45% probably willing, 24% definitely willing for Reference Plan B. The top three service elements supported by customers were 'ensuring the safety of tap water' (80%-83%), 'maintaining water pipes, treatment works and reservoirs' (77%-83%), 'avoiding the risk of homes and gardens being flooded with sewage' (78%-80%). There were key differences from the national picture in the proportion of customers who were satisfied with the current level of service, and with respect to customers' perceived value for money of, and willingness to pay for, the proposed future services as presented to respondents.

Overall Conclusions

The majority of customers were satisfied with their water and sewerage services, and felt that they offered good value for money in most areas. Customers confirmed that it was important to maintain current levels of service, rather than allow reduced levels. The majority also thought it was important to improve all service areas. When looking at specific costed plans most customers supported all (about 44%) or some (about 38%) of the areas of work put forward. Most support was given to drinking water quality and supply aspects, followed by maintaining water and sewerage systems, resolving sewer flooding problems and managing the pressure of water at the tap. Slightly less support was given to environmental and customer service aspects, although support for these was still strong in many areas and nationally all service aspects got at least 49% support across all plans (although there were some significant variations among the companies). Nationally 41-46% of customers said they were “probably willing” and 14% that they were “definitely willing” to pay for the proposals in the three plans. 19-22% were “probably not willing”, and 14% “definitely not willing” to pay, with one in ten customers overall stating that they could not afford it. At a national level more customers felt the companies’ preferred plans and reference plan A offered good than poor value for money. However, the current service was generally felt to offer better value than any of the plans. Customers showed a strong preference for gradual rather than sudden bill changes.

1

1 Introduction

1.1 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 investment should be made to maintain or improve the water environment, drinking water quality and customer service. These decisions need to take account of customers' views.

1.1.2 In preparation for setting price limits each company submitted its Draft Business Plan to Ofwat in August 2003. The Draft Business Plan covers the period 2005 to 2010 and sets out the implications for customers' bills of each company's proposals.

1.1.3 At the last review, in 1999, individual stakeholders undertook separate customer research. The different approaches and results were confusing. For this review, the Department for Environment, Food and Rural Affairs, Welsh Assembly Government, Ofwat, WaterVoice, Environment Agency, Drinking Water Inspectorate, English Nature, Wildlife and Countryside Link and the companies through Water UK agreed to conduct joint research.

1.2 The Steering Group

1.2.1 The members of the Steering Group for Customer Research 2003 for the water industry Periodic Review in 2004 represent all parties with a stake in the outcome of the process – ie government, the regulators, consumers and water companies. Steering Group members are listed below.

- **Ofwat** - the Director General of Water Services, supported by Ofwat, is the economic regulator. Ofwat's primary role is to ensure that licensed companies can carry out and finance their functions to supply water and treat sewerage, and to set price limits for all the water and sewerage companies in England and Wales. Ofwat also acts to protect customers by ensuring there is no undue discrimination in the way companies fix and recover charges, and that standards of service that customers receive are safeguarded;

- **Department for the Environment, Food and Rural Affairs (Defra) and the Welsh Assembly Government** – responsibility for regulation of drinking water quality and environmental standards and for setting the overall policy framework and vision for the price review, lies, in England, with the Secretary of State for Environment, Food and Rural Affairs, and in Wales with the Welsh Assembly Government's Minster for Environment;

- **Environmental Agency (EA)** - the non-departmental public body that champions the protection of the environment, with vested legal duties, responsibilities and powers. The Agency regulates many activities and processes that impact on the environment, including industrial and business activities that cause, or have the potential to cause, pollution to air, land and water. At the same time it must have regard to the conservation of features of special interest. The Agency also regulates the abstraction and storage of water, the exploitation of freshwater fisheries and the use of certain river navigations;

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

- **The Drinking Water Inspectorate (DWI) -** the Drinking Water Inspectorate is responsible for regulating the public water supplies in England and Wales. It assesses the quality of drinking water and takes enforcement action if standards set in the Water Supply (Water Quality) Regulations are not met;

- **WaterVoice** - customers interests are reporesented by WaterVoice. WaterVoice operates through nine committees in England and a committee in Wales, with statutory duties to represent the interests of all customers of the water and sewerage companies. The ten WaterVoice committee Chairmen form the WaterVoice Council, which deals with issues at national and European level;

- **English Nature** - the statutory body that champions the conservation and enhancement of the wildlife and natural features of England. English Nature does this by advising on nature conservation issues; regulating activities on special nature conservation sites in England; and helping others to manage land for conservation;

- **Wildlife and Countryside Link (WCL)** - brings together environmental voluntary organisations in the UK united by their common interest in the conservation and enjoyment of the natural and historic environment. WCL represent 34 organisations supported by over 6 million people.

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

1.3 Study Objectives

1.3.1 The overall business objective of the research was to inform stakeholders and decision makers of customers' priorities for the water industry in England and Wales by providing:

- *"a better understanding of what combination of existing and potential service levels would best meet customers' requirements at a company level in the context of possible bill changes; and*

- *an overview of the company area findings, which analyses and draws conclusions at a national and regional level."*

1.3.2 The research was focused on customers who pay water bills, however, it has been conducted in such a way as to allow the views of those who do not pay water bills to be separately identified. For the purpose of these objectives the term "customers" has been used to cover all those who have an interest in water quality, water and sewerage services and the water environment.

1.3.3 The specific research objectives were to:

- establish customers' views on the importance of maintaining existing assets, environmental standards, drinking water quality and service levels (the "base service level");

- understand customers' attitudes towards bill movements needed to deliver the base level;

- explore whether customers want to see outputs/improvements in areas other than those required to maintain the base service level. If so, what are the improvements they would like to see?

- determine customers' priorities between maintaining the base level and providing other improvements and the balance to be struck between maintenance of assets, environmental standards, drinking water quality and current services, such as preventing sewer flooding, and providing other services;

- establish if customers are prepared to see the pace of delivery changed in order to provide other outputs;

- assuming that the base level is to be maintained, (and in the context of how this will affect bills) explore customers' attitudes to further improvements (or packages of improvements) to drinking water quality, service levels, such as preventing sewer flooding, and the environment, as set out in Draft Business Plan Reference Plans;

- examine customers' preparedness to pay for preferred further improvements in the context of the expected effect of those improvements on the bills they pay;

- explore customers' views on the desirability of possible outputs and improvements specific only to their company areas, (as detailed in Company Preferred Strategies in Business Plans) and customers' preparedness to pay for the outputs in the context of future bill forecasts; and

- establish what profile of possible bill changes customers would prefer in the context of likely average bill effects in their area over the 5 year period, and how concerned they would be if they could not have this profile.

1.3.4 MVA, in association with WRc, were commissioned to conduct the research. 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 household finances) was achieved.

1.3.5 The survey collected attitudinal information on current services and proposed future water and sewerage services, as defined in each water company's Draft Business Plan. Respondents were presented with information on current and proposed services using 'show cards' incorporating information compiled by Ofwat and the other regulators and agreed by the companies and Project Steering Group. These included details of proposed changes to current service levels, and their effects on bills. The information presented to respondents in each company area was specific to the company or companies responsible for supplying their water and sewerage services (i.e. to their Water and Sewerage Company, or Water only Company and Water and Sewerage Company)..

1.4 Content of Report

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

1.4.2 Subsequent chapters provide the results and key findings across the companies nationally under a series of themes relating directly to the study objectives. For each theme, results are reported at a national level (ie for England and Wales separately and combined) and highlight variations at company and regional level. We also identify any statistically significant variations by customer type (such as gender, age, socio-economic class, income level and the rural or urban nature of the location, for each theme. The themes are:

- customers' current satisfaction with current water and sewerage services and the perceived value for money it offers (Chapter Three);
- the importance placed by customers on maintaining and (separately) improving services (Chapter Four);
- the appeal of each service element within each Company Plan (Chapter Five);
- customers' value for money assessment of each Company Plan (Chapter Six);
- customers' willingness to pay for each Company Plan (Chapter Seven);
- customers' level of concern over pace of delivery (Chapter Eight);
- customers preferred bill profile (Chapter Nine).

1.4.3 A copy of the questionnaire and show cards used to represent each company's proposals, as set out in their Draft Business Plans are provided in Appendix A. A full account of current and proposed future services presented to customers of each water company is documented in a separate Company Report[2], along with the company results for each question and key findings.

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

2 Methodology

2.1 Research Design

2.1.1 In order to deliver the necessary level and depth of information, a large-scale quantitative survey was undertaken. The survey obtained the views of a representative sample of customers in each of the water only companies and water and sewerage companies in England and Wales. The survey was administered face-to-face due to the sensitive subject matter and the need for a considered view on the consequences of changes in a wide range of levels of service within the water industry.

2.1.2 A total of 23 Water only and water and sewerage companies in England and Wales were included in the research.

2.2 Questionnaire Design

2.2.1 A pilot study was conducted during the week beginning 4 August 2003. The pilot study was conducted in five locations covering the following water and sewerage companies: Thames, Yorkshire Water, United Utilities Water and Dŵr Cymru Water; and water only companies: South East Water, Three Valleys Water and Dee Valley Water.

2.2.2 The pilot survey identified a number of issues with individual questions, and the average length of interview exceeded the target of twenty minutes. A further version of the questionnaire was, therefore, developed. Changes were also made to the show card material.

2.2.3 A second pilot survey was undertaken in August 2003 covering bill-payers and non bill-payers. None reported any difficulty with the questions or show material. Based on the findings of the second pilot, a final version of the questionnaire was agreed by the Steering Group.

Final Questionnaire Design

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

- satisfaction with current water and sewerage services and perceived value for money (Q1-Q2);
- importance of improvements in service and importance of maintaining standards of service (Q3-Q4);
- customer attitudes towards company preferred proposals in the Draft Business Plan (Q5a-Q5d);
- customer attitudes towards Reference Plan A proposals in the Draft Business Plan (Q6a-Q6d);
- customer attitudes towards Reference Plan B proposals in the Draft Business Plan (Q7a-Q7d);
- the existence of other improvements (if any) desired by customers (Q8);
- customers' preferred bill profile over time (Q9) and timescale for improvements (Q10a-Q10b);
- demographics (Quotas, Q11 onwards).

2.2.5 A copy of the questionnaire, and an example set of showcards, is included in Appendix A.

2.2.6 The show material presented to respondents contained details of current and proposed future water and sewerage services, as defined in each water company's Draft Business Plan. The show cards incorporated information compiled by Ofwat and the other regulators and agreed by the companies and Project Steering Group. These included details of proposed changes to current service levels, and their effects on bills. The information presented to respondents in each company area was specific to the company or companies responsible for supplying their water and sewerage services (i.e. to their Water and Sewerage Company, or Water only Company and Water and Sewerage Company).

2.2.7 Each company's Draft Business Plans contains planned outputs and associated costs for each of three plans: Reference Plans A and B, that relate to programmes specified by water regulators, and the Company Preferred Plan. Customers only commented on the three plans relevant to their own areas. It should be noted that the outputs and bill increases that customers were presented with were based upon individual company's Draft Business Plans and, therefore, may change for final business plans.

2.2.8 The variation in planned outputs and bill increases across the three plans and across the 23 water companies are summarised in Tables 2.1 to 2.3 overleaf. These tables show, for each plan in turn, those companies proposing to maintain each service element, and those companies planning improvements in each service element, and the range in expected bill increases.

Table 2.1 Reference Plan A

	Current service	Improvements	Further improvements	Bill effect range (£)
1. Maintaining water pipes, treatment work and reservoirs	ALL COMPANIES			0-32
2. Ensuring a reliable and continuous water supply	ALL COMPANIES			0-51
3. Ensuring the safety of tap water	Continue to meet current and future standards at treatment works BWH, DVW, SST, THD	To meet current and future standards at up to 20 treatment works BRL, CAM, ESK, FLK, MKT, NES, NWT, PRT, SES, SRN, SVT, SWT, TMS, TVN, WSH, WSX, YKS	To meet current and future standards at more than 20 treatment works ANH	0-23
	Mains continue to supply water meeting current standards BWH, BRL, CAM, DVW, FLK, MKT, SES, SRN, SST, SVT, TMS, TVN	Up to 1000km of water mains renovated to complete the renovation previously agreed to meet current standards ANH, ESK, PRT, SEW, WSX	More than 1000km of water mains renovated to complete the renovation previously agreed to meet current standards NES, NWT, SWT, WSH, YKS	
	Continue to meet current and future lead standards BWH, CAM, DVW, SWT, THD	Replace up to 100,000 lead communication pipes to meet current and future lead standards ANH, BRL, ESK, FLK, NES, PRT, SES, SEW, SRN, TVN, WSH, WSX, YKS, SST	Replace more than 100,000 lead communication pipes to meet current and future lead standards NWT, SVT, TMS, MKT	
4. Managing the appearance, taste & smell of tap water	No increase in customer complaints ESK, FLK, PRT, SES, SRN, SST, TMS, TVN	Up to 10% fewer customer complaints ANH, CAM, THD, WSH, SEW, SVT, WSX	A reduction of more than 10% in customer complaints BRL, BWH, DVW, MKT, NNE, NWT, SWT, YKS	0-5
5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service ANH, WSH, NES, SVT, SWT, TMS, NWT, WSX, YKS, BWH, DVW, ESK, FLK, MKT, PRT, SEW, SST, SES, THD, TVN	Reduce number of properties at risk of low pressure CAM, SRN, BRL		0
6. Handling customers accounts, complaints and customers with special needs	ALL COMPANIES except PRT	Additional Measures for customers in debt PRT		0-2
7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain current service NES, TMS	Maintain current standard and reduce sewerage treatment works odour at up to 80 sites NWT, SRN, SWT, WSX, YKS	Maintain current standard and reduce sewerage treatment works odour at more than 80 sites ANH, SVT, WSH	3-53
8. Avoiding the risk of homes and gardens being flooded with sewage	NONE	Removal of all properties at risk of internal flooding from sewers at least once in ten year and external flooding of the same severity. ANH, WSH, NES, SVT, SWT, SRN, TMS, NWT, WSX, YKS		1-8

	Current service	Improvements	Further improvements	Bill effect range (£)
9. Managing the amount of water taken from the environment to supply customers	No further KM of rivers can better support fish & wildlife ANH, CAM, ESK, THD, YKS, NES, MKT, FLK, SWT, BRL, SEW, TVN, SES, WSH, DVW	Up to 200 km of river can better support fish & wildlife SVT, SST, SRN, PRT, WSX, BWH, TMS	More than 200km of river can better support rare wildlife NWT	0-5
	No further wetlands & lakes can support rare wildlife THD, SST, YKS, NES, NWT, PRT, MKT, FLK, SWT, WSX, BRL, TVN, SES, WSH, DVW	Up to six wetlands & lakes can support rare wildlife ANH, CAM, ESK, SVT, SRN, BWH, TMS, SEW	More than six wetlands & lakes can support rare wildlife None	
10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	No further km of river can better support fish None	Up to 500km of river can better support fish ANH, SVT, YKS, NES, NWT, SRN, SWT, WSX, TMS, WSH	More than 500km of river can better support fish None	4-57
	No further km of river can support rare wildlife NES	Up to 150km of river can support rare wildlife ANH, SVT, YKS, SWT, TMS	More than 150km of river can support rare wildlife NWT, SRN, WSX, WSH	
	No further coastal waters support rare wildlife SVT, YKS, NES, NWT, TMS, WSH	Up to 50 km of coastal waters support rare wildlife ANH, SWT, WSX, TMS	More than 50 km of coastal waters support rare wildlife SRN	
	No further wetlands improved NES, SRN, SWT, WSX, WSH	One wetland improved SVT, YKS, NWT, TMS	More than one wetland improved ANH	
	No further lakes improved NES, SWT, WSX, WSH	Up to 4 lakes improved YKS, NWT, SRN, TMS	More than 4 lakes improved ANH, SVT	
	No further bathing waters improved ANH, SVT, YKS, SRN, WSX, TMS, WSH	Up to 4 bathing waters improved NES, NWT, WST	More than 4 bathing waters improved None	

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

Table 2.2 Company Preferred Plan

	Current service	Improvements	Further improvements	Bill effect range (£)
1. Maintaining water pipes, treatment work and reservoirs	ALL COMPANIES			0-37
2. Ensuring a reliable and continuous water supply	ALL COMPANIES			0-63
3. Ensuring the safety of tap water	Continue to meet current and future standards at treatment works THD, SST, DVW, BWH, FLK	To meet current and future standards at up to 20 treatment works NNE, SWT, TMS, YKS, WSX, SRN, WSH, PRT, CAM, ESK, MKT, SEW, SES, TVW, BRL,	To meet current and future standards at more than 20 treatment works ANH, SVT, NWT,	0-21
	Mains continue to supply water meeting current standards SVT, TMS, SRN, CAM, THD, MKT, SST, SES, TVW, BRL, DVW, BWH, FLK	Up to 1000km of water mains renovated to complete the renovation previously agreed to meet current standards ANH, WSX, PRT, ESK, SEW,	More than 1000km of water mains renovated to complete the renovation previously agreed to meet current standards NNE, SWT, NWT, YKS, WSH,	
	Continue to meet current and future lead standards SWT, TMS, CAM, THD, TVW, DVW, BWH, FLK	Replace up to 100,000 lead communication pipes to meet current and future lead standards ANH, NNE, YKS, WSX, SRN, WSH, PRT, ESK, SEW, SES, BRL, SST	Replace more than 100,000 lead communication pipes to meet current and future lead standards SVT, NWT, MKT,	
4. Managing the appearance, taste & smell of tap water	No increase in customer complaints TMS, SRN, PRT, ESK, SST, SES, TVW, FLK	Up to 10% fewer customer complaints ANH, SVT , WSX, WSH, CAM, THD, SEW,	A reduction of more than 10% in customer complaints NNE, SWT, NWT, YKS, MKT, BRL, DVW, BWH,	0-5
5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service ANH, NNE, SVT, SWT, TMS, NWT, YKS, WSX, WSH, PRT, ESK, THD, MKT, SEW, SST, SES, TVW, DVW, FLK	Reduce number of properties at risk of low pressure SRN, CAM, BRL, BWH,		0-2
6. Handling customers accounts, complaints and customers with special needs	ALL COMPANIES except PRT	Additional Measures for customers in debt PRT		0
7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain current service NNE, SRN,	Maintain current standard and reduce sewerage treatment works odour at up to 80 sites TMS, SWT, NWT, YKS, WSX,	Maintain current standard and reduce sewerage treatment works odour at more than 80 sites ANH, SVT, WSH,	
8. Avoiding the risk of homes and gardens being flooded with sewage	NONE	Remove up to 500 properties from risk of internal flooding from sewers at least once in ten years SWT, NNE, YKS, WSX, SRN, WSH	Remove more than 500 properties from risk of internal flooding from sewers at least once in ten years ANH, TMS, SVT, NWT,	1-9
	No proposal for external flooding included on Showcard ANH, NNE, WSX	Remove up to 500 properties from external flooding from sewers SWT, NWT, YKS, SRN, WSH	Remove more than 500 properties from external flooding from sewers TMS, SVT,	

9. Managing the amount of water taken from the environment to supply customers	No further KM of rivers can better support fish & wildlife NNE, SWT, TMS, YKS, SRN, WSH, PRT, CAM, ESK, THD, MKT, SES, TVW, BRL, DVW, BWH,	Up to 200 km of river can better support fish & wildlife ANH, SVT, WSX, SST, FLK	More than 200km of river can better support rare wildlife NWT	0-1
	No further wetlands & lakes can support rare wildlife NNE, SWT, TMS, NWT, YKS, WSX, SRN, WSH, PRT, ESK, THD, MKT, SST, SES, TVW, BRL, DVW, BWH, FLK	Up to six wetlands & lakes can support rare wildlife ANH, SVT, CAM, SEW	More than six wetlands & lakes can support rare wildlife None	
10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	No further km of river can better support fish	Up to 500km of river can better support fish TMS, SWT, NNE, NWT, YKS, WSX, SRN, WSH,	More than 500km of river can better support fish ANH, SVT,	
	No further km of river can support rare wildlife SWT, NNE, YKS,	Up to 150km of river can support rare wildlife ANH, TMS, WSX, SRN, SVT,	More than 150km of river can support rare wildlife NWT, WSH,	
	No further coastal waters support rare wildlife TMS, SWT,SVT, NNE, NWT, YKS, WSX, WSH	Up to 50 km of coastal waters support rare wildlife ANH,	More than 50 km of coastal waters support rare wildlife SRN,	
	No further wetlands improved TMS, SWT, NNE, YKS, WSX, SRN, NWT, WSH	One wetland improved SVT,	More than one wetland improved ANH,	
	No further lakes improved TMS, SWT, NNE, YKS, WSX, NWT, WSH	Up to 4 lakes improved SRN,	More than 4 lakes improved ANH, SVT,	
	No further bathing waters improved ANH, TMS, YKS, WSX, SRN, SVT,		More than 4 bathing waters improved NWT, WSH	

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

Table 2.3 Reference Plan B

	Current service	Improvements	Further improvements	Bill effect range (£)
1. Maintaining water pipes, treatment work and reservoirs	ALL COMPANIES			0-33
2. Ensuring a reliable and continuous water supply	ALL COMPANIES			0-51
3. Ensuring the safety of tap water	Continue to meet current and future standards at treatment works THD,BWH, SST, DVW	To meet current and future standards at up to 20 treatment works CAM, ESK, NNE, SRN, FLK, MKT, PRT, SEW, SVT, SWT, TMS, SES, TVW, BRL, YKS, WSH, WSX,	To meet current and future standards at more than 20 treatment works ANH, NWT,	0-23
	Mains continue to supply water meeting current standards CAM, THD, MKT, SVT, TMS, SES, TVW, BRL, DVW, SST, SRN, BWH, FLK	Up to 1000km of water mains renovated to complete the renovation previously agreed to meet current standards ANH, PRT, SEW, WSX,	More than 1000km of water mains renovated to complete the renovation previously agreed to meet current standards ESK, NNE, SWT, NWT, YKS, WSH,	
	Continue to meet current and future lead standards CAM, THD, SWT, DVW, BWH,	Replace up to 100,000 lead communication pipes to meet current and future lead standards ESK, NNE, PRT, SEW, SES, BRL, YKS, WSH, WSX, SRN, FLK, SST	Replace more than 100,000 lead communication pipes to meet current and future lead standards ANH, MKT, SVT, TMS, TVW, NWT	
4. Managing the appearance, taste & smell of tap water	No increase in customer complaints PRT, SST, TMS, SES, TVW, SRN, FLK,	Up to 10% fewer customer complaints ANH, CAM, THD, SEW,SVT, WSH, WSX,	A reduction of more than 10% in customer complaints ESK, NNE, MKT, SWT, NWT, BRL, YKS, DVW, BWH,	0-8
5. Managing the pressure of water in your taps and interruptions to supply	Maintain current service ANH, ESK, THD, NNE, MKT, PRT, SEW, SVT, SST, SWT, TMS, SES, TVW, NWT, YKS, WSH, DVW, WSX, BWH, FLK,	Reduce number of properties at risk of low pressure CAM, BRL, SRN,		0--3
6. Handling customers accounts, complaints and customers with special needs	ALL COMPANIES except PRT	Additional Measures for customers in debt PRT		0-2
7. Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works	Maintain current service NNE, TMS,	Maintain current standard and reduce sewerage treatment works odour at up to 80 sites SWT, NWT, YKS, WSX, SRN,	Maintain current standard and reduce sewerage treatment works odour at more than 80 sites ANH, SVT, WSH	3-70
8. Avoiding the risk of homes and gardens being flooded with sewage	NONE	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity. YKS, NWT, SWT, SRN, NNE	Removal of all properties at risk of internal flooding from sewers at least once in twenty years and external flooding of the same severity. TMS, WSX, ANH, SVT, WSH	

	Current service	Improvements	Further improvements	Bill effect range (£)
9. Managing the amount of water taken from the environment to supply customers	No further KM of rivers can better support fish & wildlife NNE, NWT, YKS, CAM, ESK, THD, MKT, SEW, BRL, DVW, FLK	Up to 200 km of river can better support fish & wildlife TMS, WSX, SRN, PRT, SST, SES, TVW, BWH,	More than 200km of river can better support rare wildlife ANH, SVT, NWT, WSH,	0-11
	No further wetlands & lakes can support rare wildlife NNE, SWT, WSX, WSH, ESK, THD, MKT, BRL, DVW, FLK,	Up to six wetlands & lakes can support rare wildlife SVT, NWT, YKS, SRN, PRT, CAM, SEW, SST, TVW, BWH,	More than six wetlands & lakes can support rare wildlife ANH, TMS, SES,	
10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	No further km of river can better support fish None	Up to 500km of river can better support fish NNE, SVT, SWT, TMS, YKS,	More than 500km of river can better support fish ANH, WSX, SRN, WSH, NWT	0-89
	No further km of river can support rare wildlife NNE	Up to 150km of river can support rare wildlife ANH, SWT, TMS, YKS, SVT	More than 150km of river can support rare wildlife NWT, WSX, SRN, WSH	
	No further coastal waters support rare wildlife NNE,TMS,NWT ,YKS, WSH, SVT	Up to 50 km of coastal waters support rare wildlife ANH, SWT, WSX	More than 50 km of coastal waters support rare wildlife SRN	
	No further wetlands improved NNE, SWT, WSX, SRN, WSH	One wetland improved SVT, TMS, NWT,YKS	More than one wetland improved ANH,	
	No further lakes improved NNE, SWT, WSX, WSH	Up to 4 lakes improved TMS, NWT, YKS, SRN	More than 4 lakes improved ANH, SVT	
	No further bathing waters improved ANH, SVT, TMS, YKS, SRN,		More than 4 bathing waters improved SWT, WSH	

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

2.2.9 Table 2.4 summarises further the details of these plans. The increase in overall bill implied by the 23 different Company Preferred Plans ranged from a minimum of £29 to a maximum of £172. For Reference Plan B, the variability in bill increase was even greater (from £24 to £204) whilst for Reference Plan A it was slightly narrower (from £19 to £148). Among the individual service elements, the greatest variation in bill increase was for *managing the effect of water company activities on the quality of rivers, wetlands and coastal waters* within Reference Plan B. The price of the proposed outputs varied from £0 to £89.

Table 2.4 Variation in Proposed Costs Between the Proposed Service Delivery Plans

	Company Preferred		**Reference Plan A**		**Reference Plan B**	
	Min	**Max**	**Min**	**Max**	**Min**	**Max**
Change in Overall Average Bill (Actual and %)	£29[1] (+12%)	£172[2] (+74%)	£19[1] (+9%)	£148[2] (+63%)	£24[1] (+11%)	£204[2] (+87%)
Price Effects of Service Elements[3]:						
Maintaining water pipes, treatment works & reservoirs	£0	£37	£0	£32	£0	£33
Ensuring a reliable and continuous water supply	£0	£63	£0	£51	£0	£51
Ensuring the safety of tap water	£0	£21	£0	£23	£0	£23
Managing the appearance, taste & smell of tap water	£0	£5	£0	£5	£0	£8
Managing water pressure and No. unplanned interruptions	£0	£<1	£0	£3	£0	£3
Handling customers' accounts, queries and complaints	£0	£<1	£0	£2	£0	£2
Maintaining sewers and sewerage treatment works	£3	£66	£3	£53	£0	£70
Avoiding the risk of home & garden sewerage flooding	£1	£9	£1	£8	£0	£17
Managing amount of water taken from the environment to supply customers	£0	£2	£0	£5	£0	£11
Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	£2	£56	£0	£57	£0	£89

[1] the minimum overall bill level is the lowest bill increase across the 23 companies. It is <u>not</u> the sum of the minimum increase in bill across the 23 companies for each individual element (usually £0)

[2] the maximum overall bill level is the highest bill increase across the 23 companies. It is <u>not</u> the sum of the maximum increase in bill across the 23 companies for each individual element

[3] the price increases for each service element are presented in terms of the minimum (and maximum) price increase proposed by any company. This shows the variation in the bill effect of the proposals put forward by different companies

2.3 Sampling

2.3.1 Water companies fall into two categories. Those that provide water services only ('water only' companies or WoCs) and those that provide water and sewerage services ('water and sewerage companies' or WaSCs). The water and sewerage companies also provide sewerage services to customers of the water only companies within its region. Our sampling approach ensured a minimum sample size for each water only companies and, hence, water and sewerage companies.

2.3.2 The survey had a total target sample size of 6000, including a representative sample of, separately, bill-payers and non bill-payers in each water company area. This target was achieved, in fact 6,036 interviews were obtained by the cut-off date. The definition of 'bill-paying' customers included their 'spouse or partner jointly responsible for paying energy or water bills'.

2.3.3 It was agreed that non bill-paying customers should account for 10% of the total sample size (approximately 600 respondents). Interviews were obtained with 595 non bill-payers, and this sub-sample was distributed across the 10 water regions in proportion with the number of bill-paying respondents surveyed.

2.3.4 A minimum sub-sample size for each company was set at 200 bill-payers, though the actual sample size was, to some extent, proportional to the customer base. Therefore, after assigning a minimum of 200 interviews to each water only company, the remaining sample was allocated to those water and sewerage companies with the greatest customer base: Thames Water, Severn Trent Water, United Utilities Water, Anglian Water and Southern Water. Table 2.5 shows the target and achieved sub-sample sizes by region and water company.

Table 2.5 Target and Achieved Sub-samples by Region and Water Company

Water Company/Region	Achieved	Target
Anglian Region (including area around Hartlepool)		
Anglian Water	243	250
Cambridge Water	201	200
Tendring Hundred Water	202	200
Essex & Suffolk Water	200	200
Total	**846**	**850**
Dŵr Cymru Region		
Dŵr Cymru Water	203	200
Dee Valley Water	203	200
Total	**406**	**400**
Northumbrian Region		
Northumbrian Water	203	200
Total	**203**	**200**
Severn Trent Region		
Severn Trent Water	402	400
South Staffordshire Water	201	200
Total	**603**	**600**
South West Region		
South West Water	203	200
Total	**203**	**200**
Southern Region		
Southern WASC	202	200
Bournemouth & West Hampshire Water (split across two regions)	60	60
Portsmouth Water	202	200
South East Water (split across two regions)	99	100
Mid Kent Water	199	200
Folkestone & Dover Water	218	200
Total	**980**	**960**
Thames Region		

Water Company/Region	Achieved	Target
Thames Water	398	400
South East Water (split across two regions)	102	100
Three Valleys Water	200	200
Sutton & East Surrey Water	202	200
Total	**902**	**900**
United Utilities Region		
United Utilities Water	411	400
Total	**411**	**400**
Wessex Region		
Wessex Water	181	200
Bristol Water	192	200
Bournemouth & West Hampshire Water (split across two regions)	137	140
Total	**510**	**540**
Yorkshire Region		
Yorkshire Water	357	350
Total	**357**	**350**
National (Bill-Payers) Total	**5,441**	**5,400**
Non Bill-Payers Total	**595**	**600**
National Sample	**6,036**	**6,000**

2.3.5 This sampling strategy gave sub-sample sizes of 200-400 for each water and sewerage company and sub-samples of 200 for each water only company. For some water and sewerage companies, the sample of customers responding to their provision of sewerage services is boosted by the water only company sub-samples. This increases the effective sample size for sewerage customers to 900 or more for some water and sewerage companies (Thames Water and Sourthern Water). This implies a sample to population error of between ±3% and ±7% for sewerage services provided by each water and sewerage company; between ±4% and ±7% for water services provided by each water and sewerage company and between ±4% and ±7% for water services for each water only company.

2.3.6 For each water and sewerage company, our sample represents between 0.01% and 0.04% of customers for sewerage services and between 0.01% and 0.02% of customers of water services. Between 0.01% and 0.14% of all customers were sampled for each water only company.

2.3.7 Most water only companies lie entirely within a region, and customers have only one sewerage service provider. For two water companies, however, the sample encompassed more than one region. Bournemouth and West Hampshire encompass both Southern and Wessex regions, and South East Water encompasses both Southern and Thames. For both these companies, we collected a sub-sample of customers from each region. Similarly, for Anglian Water, a small sub-sample of customers was obtained from the Hartlepool area, where Anglian Water provides water only services. Although Essex and Suffolk Water is served by two sewerage companies only customers in the Anglian Water sewerage region were questioned.

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

2.3.9 The randomly selected OAs were cross-referenced with the Postal Address File (PAF) to derive a detailed address list for each survey site. Quotas were then set (in terms of gender, socio-economic group and working status) according to 2001 Census statistics for each selected OA. In addition, working status was added to the sampling stratification. This ensured sufficient numbers of responses from full-time workers, and avoided over-representation of retired people. Quotas were not set by age category to avoid introducing a bias (since the proportion of bill-payers (or spouses) in younger age groups (e.g. 16-24 years) is likely to be much smaller than for the total population).

2.4 Fieldwork

2.4.1 The fieldwork took place between 22 September and the 31 October 2003.

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

2.4.3 Interviews were conducted during the week, at weekends and at various times of the day in order to achieve the desired quotas.

2.5 Analysis

2.5.1 All data were entered by trained staff using the SPSS data entry package. Data analysis was conducted using SPSS and Microsoft Excel.

2.5.2 Differences in attitude across different sections of the public have been explored at national, regional and company level. Analysis was conducted separately for bill payers and non-bill payers. The bill-payer sample has been weighted to accord to 2001 Census statistics by company area, gender, working status and socio-economic group.

2.5.3 Responses at company level have been weighted according to customer population to give results at the regional level. At the national level, results at a regional level in England were weighted by the respective bill-paying populations in each region (for all questions). The results, reported in subsequent chapters, for customers in England (denoted by a flag of St George) are, therefore, representative of the views of customers in the nine WaterVoice regions of: Anglian, Northumbrian, Severn Trent, South West, Southern, Thames, United Utilities, Wessex and Yorkshire. The results, reported in subsequent chapters, for customers in Wales (denoted by the Welsh flag) are representative of the views of customers in the Dŵr Cymru region.

2.5.4 Both in this National Report, and in the Company 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.

2.5.5 The results for non-bill payers have been aggregated from company to regional level, and regional to national level, using the same weighting factors as devised for bill-payers (described above). The underlying assumption here is that the ratio of the non bill-payer population in Region A relative to Region B is similar to the ratio of the bill-payer population in Region A relative to Region B. Results for non-bill payers are reported in the national section alongside those of bill payers only when statistically significantly different. (It should be noted that the non bill-payers sample comprised small sub-samples from across the regions and will have been presented with very different company information).

2.5.6 As the findings at company level have been aggregated to give a national picture care must be taken when interpreting customers' wishes for future water and sewerage services at an aggregated (regional and national) level. This is because each company starts from a different baseline position in terms of current service and price and makes proposals for a range of different outputs and costs. While the phrasing of the questions on the questionnaire was the same for all customers the showcard material was different. Planned output levels across the ten service elements vary considerably - from maintaining service to extensive improvements and from bill increases of £19 to increases of £204.

2.5.7 Data for bill-payers has also been analysed to compare perceptions and attitudes amongst different customer segments where appropriate and when sample sizes allowed.

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

2.5.9 Throughout this report, we identify differences in customer response between different companies, regions and customer segments. Unless stated otherwise, these differences have been found to be statistically significant at the 99% confidence level. Differences amongst different customer segments within each company are identified in the separate Company Report and have been found to be statistically significant at the 95% confidence level.

2.5.10 In the results tables that follow, we report the number of bill-paying customers who responded to the particular question of interest. This varied from question to question as some responses were missing (usually less than 1%). Analysis of non bill-payers has not been reported within the results tables because the findings generally reflect those of bill-payers. Any statistically significant differences are noted in the accompanying text.

2.5.11 For completeness, and to aid comparisons, customer reaction to each question in turn is reported by company, region and nationally in Appendix B. A full account of customer views is reported, for each company in turn, in the accompanying Company Report.

3

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

3.1 Question Context

3.1.1 Customers were presented with a description of current services supplied by their water and sewerage company(ies) and asked whether they were satisfied with the current service level. They were then shown the average bill level in their area and asked whether they felt the current service offered good or poor value for money. Both current service delivery and associated bill vary considerably across the companies. The bill level for water and sewerage services presented to respondents ranged from an average of £188 per annum (South Staffordshire Water for water services and Severn Trent Water for sewerage services) to £328 (South West Water).

3.2 Summary Findings

3.2.1 Results indicate that customers' satisfaction with their company's delivery of existing water and sewerage services is generally high.

3.2.2 The proportions of "fairly", "very" or "extremely satisfied" customers ranged from 67% to 89% in different company areas (with an average, nationally, of 79%). In contrast, between 4% and 18% of customers (with an average of 10%) were "fairly", "very" or "extremely dissatisfied".

3.2.3 Just over half (55%) of all customers, nationally, considered the current service to offer "fairly good", "very good" or "extremely good value for money". However, this proportion varied significantly across the companies, from 71% (average bill level of £257) to 37% (average bill level of £334). At three companies, less than 50% perceived current services to offer good value for money.

3.2.4 Overall, just under one in five customers in England (18%) considered their current service to offer "fairly poor", "very poor " or "extremely poor value for money". This proportion was significantly higher in Wales (24%). At company level, the percentage of customers who considered their service offered poor value for money ranged from 11% (Wessex Water) to 42% (South West Water). At only one company (South West Water) was the current service considered to offer poor value for money by more customers than thought it offers good value for money.

3.3 Current Satisfaction with Water and Sewerage Services

3.3.1 Respondents were asked to rate their overall satisfaction with their current water and sewerage services. The level of service varies from company to company, due to differences in the quality of the natural environment and investment decisions made in the past. Descriptions of each water company's current service provision are reported within each Company Section of the Company Report. Customer satisfaction levels amongst bill-payers are reported at a national level in Table 3.1. This Table also shows the range of variation across the companies.

3.3.2 Most respondents (79%) were "fairly", "very" or "extremely" satisfied with the current level of service provided by their water and sewerage company(ies). Only one in ten customers (10%) were "fairly", "very" or "extremely" dissatisfied with current services. A further 11% were neither satisfied nor dissatisfied.

3.3.3 The overall balance of positive and negative views was broadly similar for non bill-payers. However, significantly fewer non bill-payers were "fairly", "very" or "extremely" satisfied with their current level of service provisions (70% compared with 79% of bill-payers). And more non bill-payers were "neither satisfied nor dissatisfied" with their service provision (13% compared with 9% of bill-payers).

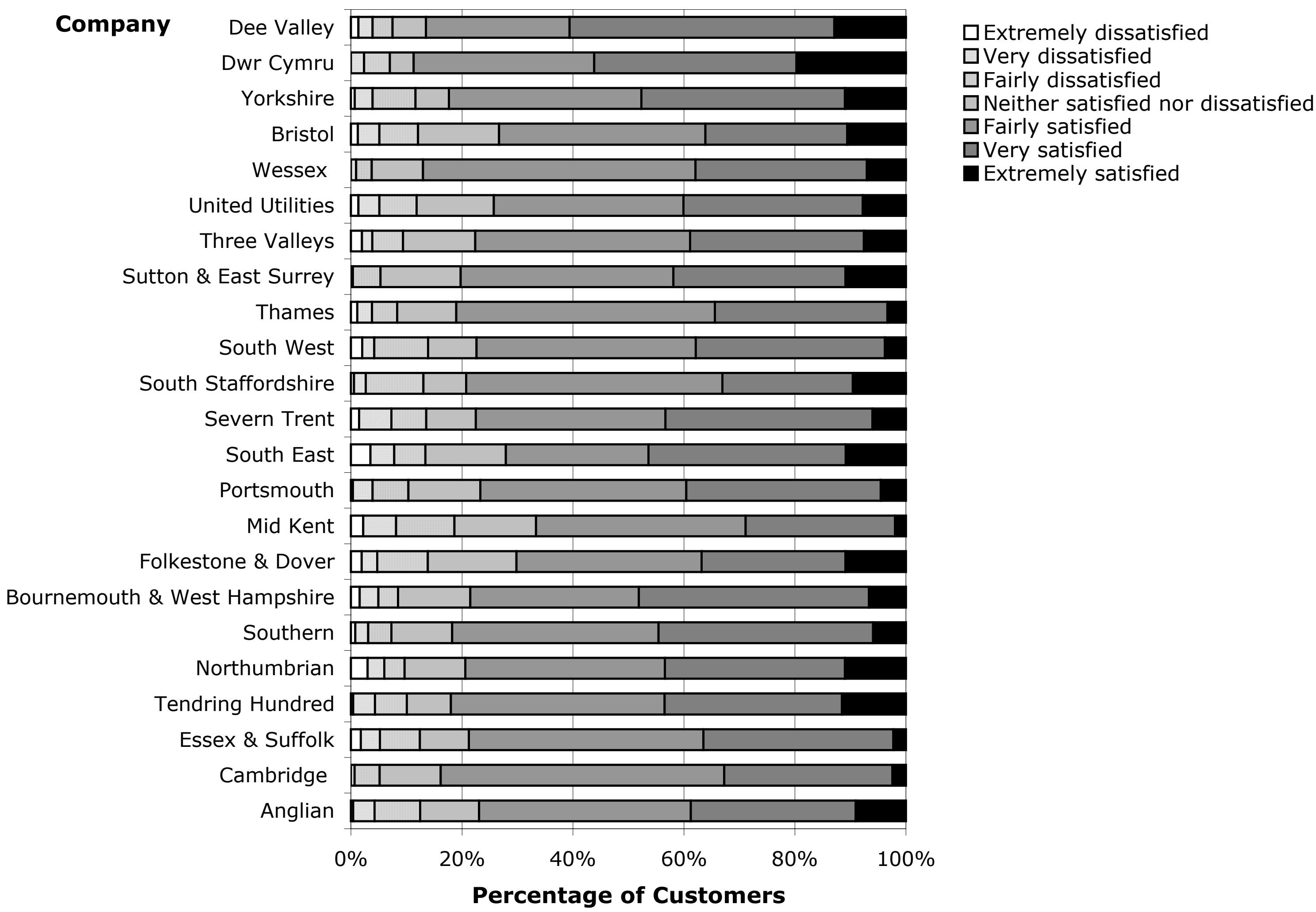
In addition, significantly more non bill-payers selected the "don't know/can't say" option.

Table 3.1 Bill Payers' Current Satisfaction with Each Company's Current Service

				**Min. value across all companies**	**Max. value across all companies**
Extremely dissatisfied	1%	1%	0%	0%	3%
Very dissatisfied	3%	3%	2%	0%	6%
Fairly dissatisfied	6%	6%	5%	3%	10%
Neither satisfied/dissatisfied	9%	9%	**4%**	4%	15%
Fairly satisfied	38%	38%	32%	26%	51%
Very satisfied	33%	33%	37%	24%	48%
Extremely satisfied	8%	7%	**19%**	2%	20%
Dont know/cant say	1%	1%	0%	0%	4%
TOTAL	100%	100%	100%		
No. of respondents	**5437**	**5032**	**405**		

3.3.4 Satisfaction levels varied significantly across the companies, from 67% of customers of Mid Kent Water to 89% of Dŵr Cymru customers. This can be seen from Figure 3.1.

Figure 3.1 Bill Payers' Current Satisfaction with Current Services by Company



3.3.5 In the Welsh Water Dŵr Cymru area a significantly higher proportion of customers were "extremely satisfied" with their current service provision and slightly fewer respondents were "neither satisfied or dissatisfied". Also within the Welsh Water Dŵr Cymru region, respondents receiving their water services from Dee Valley Water were less likely to be "fairly satisfied" and more likely to be "very satisfied".

3.3.6 Responses were also analysed by customers' age group, gender, socio-economic group, household income, location of the property and whether customers are charged via a water meter. Customer satisfaction varied significantly from the national pattern by age, household income and whether the location was rural/suburban/urban. Differences between customers in different age groups and at different household income levels were particularly marked.

3.3.7 As shown in Table 3.2, customers aged under 45 were more likely to be "neither satisfied or dissatisfied" with their present water and sewerage services. More respondents aged over 65 were "very satisfied" and more respondents aged under 25 were "extremely satisfied" with their current service provision. More respondents with a household income of at least £30,000 were also "very satisfied" with present services.

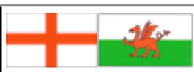
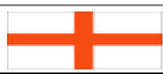
Table 3.2 Current Satisfaction with Each Company's Current Service by Age and Household Income

	Total	Age				Household Income				
		18-24	25-44	45-64	65+	<10K	10-20K	20-30K	30K+	Don't know
Extremely dissatisfied	1%	0%	1%	1%	1%	2%	1%	0%	1%	2%
Very dissatisfied	3%	2%	3%	3%	4%	4%	3%	3%	3%	4%
Fairly dissatisfied	6%	5%	5%	8%	5%	7%	7%	5%	5%	6%
Neither satisfied/dissatisfied	9%	12%	11%	8%	7%	9%	9%	6%	8%	10%
Fairly satisfied	38%	34%	39%	39%	33%	36%	38%	36%	38%	39%
Very satisfied	33%	31%	31%	32%	41%	33%	32%	38%	37%	31%
Extremely satisfied	8%	13%	8%	7%	8%	8%	10%	9%	7%	7%
Don't Know/Can't say	1%	1%	2%	1%	1%	1%	1%	1%	2%	1%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
No. of respondents	**5434**	**156**	**2097**	**2094**	**1047**	**782**	**699**	**603**	**1087**	**2263**

3.4 Value for Money of Current Service

3.4.1 Respondents were presented with the average bill level for their area alongside a description of the current service provision. They were then asked to rate their perception of the value for money of current water and sewerage services. The results are reported for customers in England and Wales (combined and separately) in Table 3.3.

Table 3.3 Perceived Value for Money of Current Service

				**Min. value across all companies**	**Max. value across all companies**
Extremely poor value	2%	2%	0%	0%	6%
Very poor value	5%	5%	**10%**	0%	12%
Fairly poor value	11%	11%	14%	7%	26%
Neither poor nor good value	21%	21%	18%	10%	33%
Fairly good value	38%	39%	33%	28%	44%
Very good value	15%	15%	17%	7%	33%
Extremely good value	2%	2%	3%	0%	5%
Dont know/cant say	5%	5%	4%	1%	11%
TOTAL	100%	100%	100%		
No. of respondents	**5438**	**5033**	**405**		

3.4.2 More than half (55%) of customers, nationally, think their current service offers "fairly", "very" or "extremely" good value for money, 18% of customers consider their current service to offer "fairly", "very" or "extremely" poor value for money.

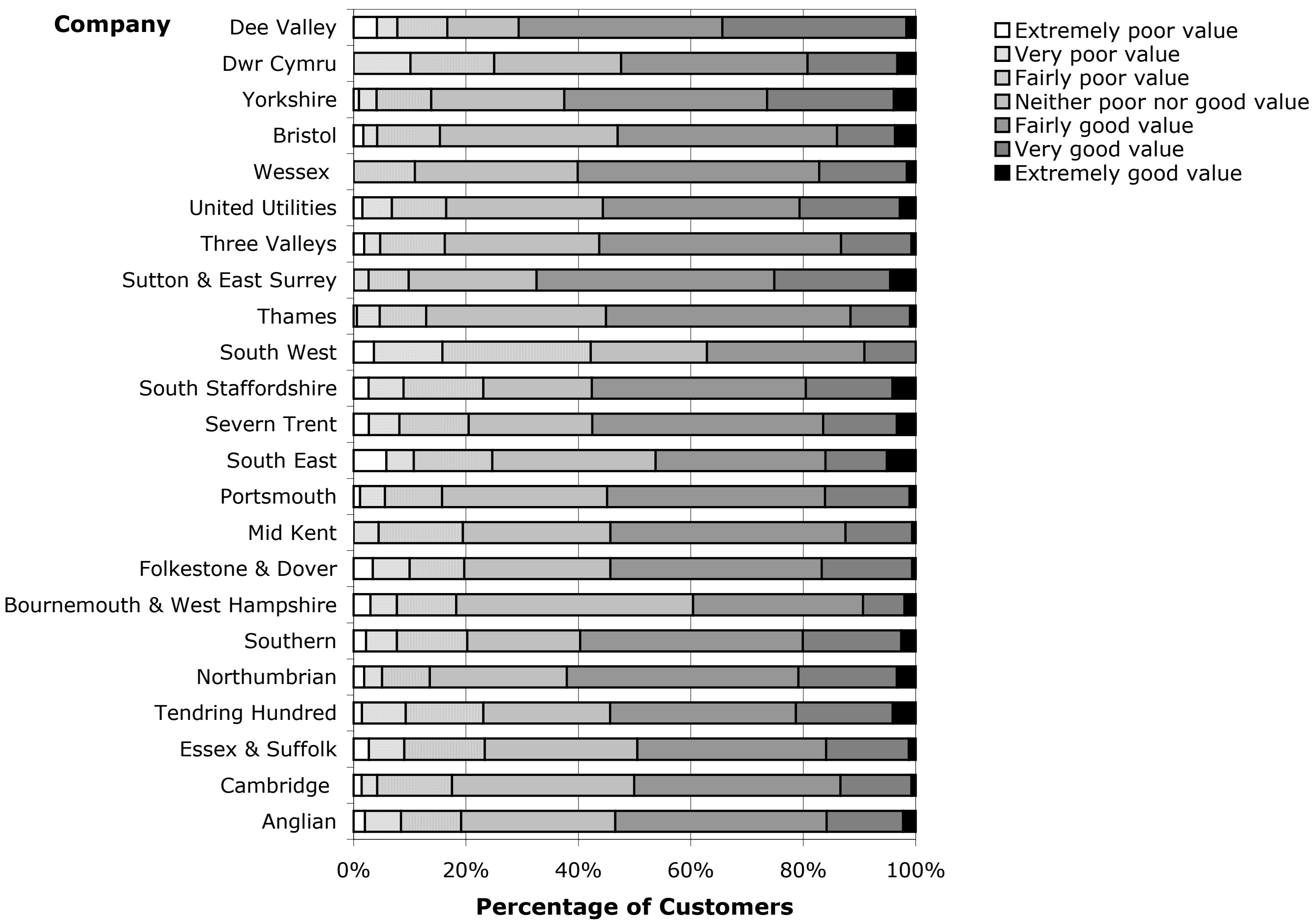
3.4.3 Most customers thought that their current service provision was "fairly good value" for money (38%), "very good value" for money (15%) or "extremely good value" for money (2%). The proportion of customers who perceived their current service offered ("fairly", "very" or "extremely") good value for money ranged across the companies from 71% (Dee Valley Water) and 67% (Sutton and East Surrey Water) to 40% (Bournemouth and West Hampshire Water) and South West Water (37%).

3.4.4 Less than one in five customers (18%) in England considered their current service to offer "fairly", "very" or "extremely" poor value for money. A significantly greater proportion of about one in four customers in Wales (24%) considered their current service to offer "fairly", "very" or "extremely" poor value for money. The percentage of customers who considered their service offered poor value for money ranged from 11% (Wessex Water) to 42% (South West Water).

3.4.5 The greatest variation in perceived value for money was amongst South West Water customers where more people considered the service to offer poor value for money (42%) than good value for money (37%).

3.4.6 Not surprisingly, just over one in four (26%) of non bill-payers selected the "don't know/can't say" option for this questions. This is significantly more than bill-payers (5%). The proportions that gave other answers were, correspondingly, significantly smaller. Fewer non bill-payers considered their current service to offer "fairly", "very" or "extremely" good value for money (42% of non bill-payers compared with 55% of bill payers). Similarly, fewer non bill-payers considered their current level of service to be "fairly", "very" or "extremely" poor value (13% of non bill-payers compared with 18% of bill-payers). The balance of positive and negative views is nevertheless similar to that of bill-payers, since the differences are mainly due to the much larger number of non bill-payers who were unable to answer this question.

Figure 3.2 Perceived Value for Money of Current Services by Company



3.4.7 Perceptions of value for money were compared across the different customer segments. Respondents aged under 25 or over 65 were more likely to rate their current water and sewerage services as "very good value" for money. Males were more likely to rate current services as "fairly good value". These differences can be seen in Table 3.4. There was also some evidence to suggest that the percentages of customers that felt they currently get good value for money were lower amongst low income and socio-economic categories D and E.

Table 3.4 Perceived Value for Money of Current Service by Age

	Total	Age				Gender	
		18-24	25-44	45-64	65+	M	F
Extremely poor value	2%	2%	2%	2%	2%	2%	2%
Very poor value	5%	2%	5%	6%	5%	5%	5%
Fairly poor value	11%	9%	10%	12%	12%	12%	11%
Neither poor nor good value	21%	20%	24%	20%	18%	20%	22%
Fairly good value	38%	31%	39%	39%	37%	41%	36%
Very good value	15%	21%	12%	14%	21%	14%	16%
Extremely good value	2%	5%	2%	3%	2%	2%	3%
Don't know/Can't say	5%	10%	6%	4%	4%	5%	6%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
No. of respondents	**5439**	**156**	**2101**	**2096**	**1047**	**2678**	**2762**

4

4 Customer Views on the Importance of Maintaining and Improving Services

4.1 Question Context

4.1.1 Customers were asked how important they felt it was to maintain the current service level, for each of the ten service elements, rather than have this reduced. They were also asked how important it was for each of these service elements to be improved. At this stage of the interview, there was no reference to the costs of maintaining services in the future.

4.2 Summary Findings

4.2.1 Customers attached very high importance to maintaining the current levels of all areas of service delivery, and not allowing them to deteriorate. This high level of importance is consistent across all companies.

4.2.2 Although the importance attached to maintaining the current service was high across all service areas, some were considered significantly more important than others, nationally:

- maintaining *water quality – ensuring the safety of drinking water* and *ensuring a reliable and continuous supply of water* were reported as significantly more important than any other service area listed (95% of all customers said that maintaining these service elements is important or very important);
- *maintaining water pipes, treatment works and reservoirs* (92%), *avoiding the risk of homes and gardens being flooded with sewage*, *managing the appearance, taste and smell of tap water*, and *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* (all 91%) were rated the next most important areas to be maintained, by customers nationally;
- *managing the pressure of water in your taps and the number of unplanned interruptions* was the next most important aspect of service delivery, nationally, to be maintained (90% of customers considered this important or very important);
- though still important to an overall majority of customers, the environment services *managing the amount of water taken from the environment to supply customers* (87%) and *managing the effect of water company activities on rivers, wetlands and coastal waters* (87%) had significantly lower support when compared to the other existing service elements; and
- though still important to an overall majority of customers, *handling customers' accounts, complaints and customers with special needs* (83%) had significantly lower support to maintain than the others (except in Wales, where 95% of customers wanted the current service level to be at least maintained).

4.2.3 *Drinking water quality – ensuring the safety of tap water* was one of the two most important services customers wished to see maintained at 22 of the 23 companies. Generally, this service was rated as the most important to be maintained, though at Anglian Water and Three Valleys the priority was *ensuring a reliable and continuous supply of water*. And customers of Tendring Hundred Water and Bournemouth and West Hampshire Water gave their priority to *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works.*

4.2.4 Priorities were very different amongst Wessex customers, who were most keen to see *handling customers' accounts, queries, complaints and customers with special needs* and *managing the pressure of water in your taps and the number of unplanned interruptions* being maintained.

4.2.5 When asked to consider the importance of improving each service element (again with no reference to cost), most customers expressed strong support for improvements in all service areas. Indeed, the proportion that wanted even the least important service aspect to be improved still represents a majority of all customers (62%). However, customers do not attach as much importance to improvements as they do to maintaining current service levels.

4.2.6 Most customers felt that it was either "important" or "very important" to improve all current service levels (over 50% for all elements at a national and regional level). There was greatest support for improvements in services amongst customers of Essex and Suffolk Water and least support for improvements amongst Three Valleys Water customers. There was also a generally lower level of support for improvements amongst customers of Anglian Water, Southern Water, South West Water and Thames Water.

4.2.7 The importance of improving each service, for customers across all 23 companies, was as follows (in descending order of relative importance):

- *managing the appearance, taste and smell of tap water* (81%);
- *drinking water quality – ensuring the safety of tap water* (76%);
- *avoiding the risk of homes and gardens being flooded with sewage* and *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* (74-73%);
- *ensuring a reliable and continuous water supply*, *managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters*, *maintaining water pipes, treatment works and reservoirs* and *managing the amount of water taken from the environment to supply customers* (72-71%);
- *managing the pressure of water in taps and the number of unplanned interruptions* (69%); and
- *handling customers' accounts, complaints and customers with special needs* (62%).

4.2.8 Improvements to *managing the appearance, taste and smell of tap water* were considered significantly more important than improvements to any other service element. *Drinking water quality – ensuring the safety of tap water* was the second most important element. For 22 of the 23 water companies, these two service elements were always in the 'top five' for improvements and, typically, supported by two-thirds or more of all customers.

4.2.9 For most companies, around two-thirds of customers wanted improvements in managing the amount of water taken from the environment to supply customers and managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters. However, there was considerable variation in support across the companies, ranging from 37% to 91% of customers (with an average of 71%).

4.2.10 Improving *handling customers accounts, complaints, and customers with special needs* was considered the least important aspect to improve. It was given significantly least priority of all, nationally.

4.2.11 This pattern of priorities was broadly similar across most of the companies.

4.3 Importance of Maintaining Services

4.3.1 Table 4.1 shows the proportions of customers who thought that maintaining each element of service was "important" or "very important" nationally and the degree of variation at company level. Service elements have been grouped, to reflect statistically significant differences in terms of customer priority.

4.3.2 Customers attach very high importance to maintaining the current levels of all areas of water and sewerage service delivery, and not allowing them to deteriorate. Most customers felt that maintaining the current standard was important or very important (over 70% for all service elements and for all companies).

Table 4.1 Percentage Thinking Maintaining Each Element of their Current Service is Important/Very Important

Significantly different priorities	Service Area				Min. value across all companies	Max. value across all companies
Group 1	Ensuring the safety of tap water	95%	94%	99%	75%	100%
	Ensuring a reliable and continuous water supply	95%	94%	98%	84%	100%
Group 2	Maintaining water pipes, treatment works and reservoirs	92%	92%	98%	75%	99%
	Avoiding the risk of homes and gardens being flooded with sewage	91%	91%	93%	78%	97%
	Managing the appearance taste, and smell of tap water	91%	91%	98%	71%	99%
	Maintaining sewerage pipes & treatment works, meeting new demands & controlling smells from sewage works	91%	91%	96%	81%	99%
Group 3	Managing the pressure of water in your taps and interruptions to supplies	90%	89%	98%	81%	98%
Group 4	Managing the amount of water taken from the environment to supply customers	87%	87%	94%	75%	95%
	Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	87%	87%	95%	73%	97%
Group 5	Handling customers' accounts, complaints and customers with special needs	83%	82%	95%	72%	96%
	No. of respondents	**5403**	**4997**	**406**		

4.3.3 Although the importance of maintaining the current service was high in all service areas, some are significantly more important than others, nationally. In descending order of relative importance, these are:

- *water quality – ensuring the safety of drinking water* and *ensuring a reliable and continuous supply of water* (95%);
- *maintaining water pipes, treatment works and reservoirs* (92%), *avoiding the risk of homes and gardens being flooded with sewage*, *managing the appearance, taste and smell of tap water*, and *maintaining sewers and*

sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works (92-91%);

- *managing the pressure of water in your taps and the number of unplanned interruptions* (90%);
- *managing the amount of water taken from the environment to supply customers* and *managing the effect of water company activities on rivers, wetlands and coastal waters* (87%); and
- *handling customers' accounts, complaints and customers with special needs* (83%). In Wales, however, 95% of customers wanted to see the service level at least maintained.

4.3.4 A number of common patterns emerged from the analysis at company level:

- *drinking water quality – ensuring the safety of tap water* was one of the two most important services to be maintained for all but one of the companies. Customers of 18 of the 23 companies considered this service element to be the most important to maintain. More than 80% of customers reported it as "important" or "very important" to maintain.
- the most important service element to maintain for customers of Anglian Water and Three Valleys Water was *ensuring a reliable and continuous supply of water*. For customers of Bournemouth and West Hampshire Water and Tendring Hundred Water it was *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works*.
- the top two priorities for customers of Wessex Water differed from the other companies. The two service areas that these customers thought it is most important to maintain were *handling customers' accounts, complaints and customers with special needs* and *managing the pressure of water in your taps and the number of unplanned interruptions*.
- in all but six companies, *handling customers' accounts, complaints and customers with special needs* was rated as one of the two least important service element to maintain. But in contrast, South Staffordshire Water customers rated this the fifth most important, while Mid Kent Water customers rated it third, and (as indicated above) Wessex Water customers considered it the most important service to be maintained.
- customers in just two companies rated *managing the amount of water taken from the environment to supply customers* and *managing the effect of water company activities on rivers, wetlands and coastal waters* in their top five list of priorities. Customers at Southern Water indicated that *managing the effect of water company activities on rivers, wetlands and coastal waters* is the fourth most important service element to be maintained.
- the service elements *avoiding the risk of homes and gardens being flooded with sewage* and *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* were usually ranked in the middle, between third and eighth in priority. Exceptions were found among customers of:

    - Tendring Hundred Water and Bournemouth and West Hampshire Water, who considered *maintaining sewers and sewage treatment* *works, ensuring the network can meet new demands and controlling smells from sewage works* to be their number one priority;

- Yorkshire Water who considered *avoiding the risk of homes and gardens being flooded with sewage* as their second most important priority; and

- Dŵr Cymru who considered *avoiding the risk of homes and gardens being flooded with sewage* as the least important service element to be maintained (though 93% of customers thought it "important" or "very important" to maintain).

- customers of Dŵr Cymru, Sutton and East Surrey Water, Northumbrian Water and Tendring Hundred Water were most likely to rate any of the service elements as important or very important to maintain.

- customers of Wessex Water and Three Valleys were the least likely to rate any of the service elements as important or very important to maintain.

4.3.5 Although there was considerable variation across the companies, there was no significant variation by gender, age, SEG, having a water meter, household income, the location of their property, or their level of current satisfaction.

4.3.6 There was also no significant variation between bill-payers and non bill-payers.

4.4 Importance of Improving Current Service Levels

4.4.1 Customers were asked how important they felt it was to improve current service levels for each of the different service aspects. Table 4.2 shows the proportions that thought improving each element was "important" or "very important" at a national level. The Table also highlights the range of variation at company level.

4.4.2 Most customers felt that it was either "important" or "very important" to improve current service levels (over 50% for all elements at a national and regional level). There was greatest support for improvements in services amongst customers of Essex and Suffolk Water and least support for improvements amongst Three Valleys Water customers. There was also a generally lower level of support for improvements amongst customers of Anglian Water, Southern Water, South West Water and Thames Water.

4.4.3 Improving *managing the appearance, taste and smell of tap water* was identified as significantly more important than any other service element, and *drinking water quality – ensuring the safety of tap water* was the second most important element. Improving *handling customers accounts, complaints, and customers with special needs* was considered the least important to improve, compared with all the other service elements. This pattern of priorities was broadly similar across most companies.

4.4.4 The importance of improving each service, for customers across all 23 companies, was as follows (in descending order of their relative importance):

- *managing the appearance, taste and smell of tap water* (81%);

- *drinking water quality – ensuring the safety of tap water* (76%);

- *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* and *avoiding the risk of homes and gardens being flooded with sewage* (73-74%);

- *ensuring a reliable and continuous water supply*, *managing the effect of water company activities on rivers, wetlands and coastal waters*, *maintaining water pipes, treatment works and reservoirs* and *managing the amount of water taken from the environment to supply customers* (71-72%);

- *managing the pressure of water in your taps and the number of unplanned interruptions* (69%); and

- *handling customers' accounts, complaints and customers with special needs* (62%).

Table 4.2 Percentage Thinking Improving Each Element of their Current Service is Important/Very Important

Significantly different priorities	Service Area				Min. value across all companies	Max. value across all companies
Group 1	Managing the appearance taste, and smell of tap water	81%	80%	84%	64%	94%
Group 2	Ensuring the safety of tap water	76%	76%	82%	46%	91%
Group 3	Maintaining sewerage pipes & treatment works, meeting new demands & controlling smells from sewage works	74%	74%	77%	34%	93%
	Avoiding the risk of homes and gardens being flooded with sewage	73%	73%	76%	35%	94%
Group 4	Ensuring a reliable and continuous water supply	72%	71%	77%	33%	88%
	Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	71%	71%	77%	41%	88%
	Maintaining water pipes, treatment works and reservoirs	71%	71%	76%	41%	88%
	Managing the amount of water taken from the environment to supply customers	71%	71%	75%	37%	91%
Group 5	Managing the pressure of water in your taps and interruptions to supplies	69%	69%	73%	40%	87%
Group 6	Handling customers' accounts, complaints and customers with special needs	62%	62%	68%	33%	87%
	No. of respondents	**5355**	**4949**	**406**		

4.4.5 The two most important improvements nationally (*managing the appearance, taste and smell of tap water* and *drinking water quality - ensuring the safety of tap water*) were always in the top five service elements to be improved except for customers of Bristol Water. Here, the services with greatest support for improvement are *managing the effect of water company activities on rivers, wetlands and coastal waters* and *managing the amount of water taken from the environment to supply customers*.

4.4.6 Customers of 18 of the 23 companies considered *managing the appearance, taste and smell of tap water* the most important candidate for improvement. Those in Anglian Water, Tendering Hundred Water, Bournemouth and West Hampshire Water and Wessex Water deemed *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* and Portsmouth Water considered *drinking water quality - ensuring the safety of tap water* to be most important.

4.4.7 Customers' assessments about the importance of introducing improvements were investigated by customer segment. Responses varied significantly across customers in rural, suburban or urban locations. As seen in Table 4.3, for all service aspects, customers living in suburban areas were more likely than those living in urban or rural areas to value improvements as important. And customers living in urban areas were least likely to feel the current service level needed to improve.

Table 4.3 Percentage Thinking Improving Each Element of their Current Service is Important or Very Important by Rural or Urban Location

	Total	Location of Property		
		Rural	**Sub**	**Urban**
Maintaining water pipes, treatment works and reservoirs	71%	68%	76%	66%
Ensuring a reliable and continuous water supply	72%	68%	78%	65%
Ensuring the safety of tap water	76%	76%	82%	70%
Managing the appearance taste, and smell of tap water	81%	82%	86%	74%
Managing water pressure in your taps and the number of unplanned interruptions	69%	69%	73%	63%
Handling customers' accounts, queries, complaints and customers with special needs	62%	63%	66%	57%
Maintaining sewerage pipes & treatment works, ensuring the network meets new demands and controlling smells from sewage works	74%	72%	82%	67%
Avoiding the risk of homes and gardens being flooded with sewage	73%	70%	80%	67%
Managing the amount of water taken from the environment to supply customers	71%	68%	77%	66%
Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	72%	69%	77%	66%
No of respondents	**5315**	**1219**	**2238**	**1777**

4.4.8 The overall level of satisfaction with their current level of service also had a significant effect on the way in which customers responded. More customers who were "dissatisfied" with their current level of service felt it was "important" or "very important" that the current level of service was improved, in the case of most service aspects.

4.4.9 Customers with a water meter were particularly likely to say it was "important" or "very important" to improve the way in which:

- *handling customer accounts, complaints and customers with special needs* are dealt with; and in
- *managing the amount of water taken from the environment to supply customers.*

4.4.10 For most service aspects, the proportions that felt it was "important" or "very important" to improve the current service level decreased as income increased. However, customers with higher incomes attached more importance to improving the way in which customers' accounts, complaints and customers with special needs are dealt with.

4.4.11 There was no statistically significant variation between bill-payers and non bill-payers.

5

5 Appeal of Individual Elements of Each Plan

5.1 Question Context

5.1.1 Respondents were informed that their water and sewerage company(ies) was considering plans that proposed a number of key changes to service provision. Details of each of the three Draft Business Plans for their company (Company Preferred, Reference Plan A, and Reference Plan B) were presented to respondents in the form of a service level description and bill impact for each of the ten service elements. Respondents were then asked which, if any, of these proposed service outputs they would like to see included in future service provision. The procedure was repeated three times, once each for plan.

5.1.2 There was considerable variation in proposed service quality outputs and bill increases across the three plans and, in particular, across the 23 companies. Table 2.1 highlights the range in cost for each individual service element for each plan. For many of the plans presented to respondents, the most expensive service outputs were: *managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters* (up to £89); *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* (up to £70); and *ensuring a reliable and continuous water supply* (up to £63). Tables 2.2 to 2.4 indicate the range of variations in proposed service quality of the ten service elements.

5.1.3 For each plan that they were presented with, respondents initially indicated whether they would like to see none, some or all of the proposed service element outputs. In the tables of findings that follow, we report the proportions of customers wanting to see each service element. In calculating this proportion we have included those customers who want to see all of them.

5.2 Summary Findings

5.2.1 Between 42% and 45% of customers, nationally, wanted to see all of the elements in each of the plans put forward by their company. A further 37-38% of customers wished to see some of them and 17-20% wanted to see none. Across the companies, between 31% and 74% of customers selected all of the elements in each of the plans. Whilst 19-52% of customers wished to see some of them and 7-26% wanted to see none. Support for all or some of the elements of the plans should be borne in mind when considering the differences between individual service aspects.

5.2.2 The area of service delivery most customers wanted to see was *drinking water quality - ensuring the safety of tap water* (around 70% for each plan). For the majority of companies, this service element was proposed at an improved level and at an additional cost. Indeed, this area of service delivery was found to:

- be the most important to maintain;
- be the most important to improve;
- have the most support within each of the three plans presented to respondents;
- have the most support for further improvement, beyond that defined within the proposals presented; and
- be the aspect of greatest concern if there were delays in delivery in order to keep costs down.

5.2.3 Customer support for maintaining and improving the safety of tap water does not appear to be greatly affected by the associated cost. The cost of the companies' differing service delivery outputs range from £0 (Dee valley Water, Bournemouth and West Hampshire Water) to £21 (South West Water) for the Company Preferred Plan, and £0 (Dee valley Water) to £23 (Folkestone and Dover Water) for each of Reference Plans A and B.

5.2.4 *Managing the appearance, taste and smell of tap water* and *ensuring reliable continuous supply* were rated as the next most important service elements to be included in any of the three plans presented to respondents. Between 48-88% of customers (with an average of 64%) wanted to see their company introduce the proposed level of *managing the appearance, taste and smell of tap water* (for which improvements were, typically, proposed with fairly low associated additional bill increases - between £0 and £3). And between 49-85% (with an average of 62%) of customers wanted to see the proposed level of *ensuring a reliable and continuous water supply* (for which maintaining standards was, typically, proposed at a cost of between £10 and £20).

5.2.5 However, when maintenance of *ensuring a reliable and continuous water supply* was offered at substantially higher cost, the percentage of customers wanting to see the planned output declined. This was the case at Folkestone and Dover Water, Mid Kent Water and Thames Water, where the cost of maintaining this service element varied from £51-£63, £32-£35 and £14-£16 respectively. Similarly, interest in *managing the appearance, taste and smell of tap water* was lower (ranked 4th or 5th) when the cost of improvements rose to £5 or £8 (at Mid Kent Water and Sutton and East Surrey Water respectively) than for customers nationally.

5.2.6 Across the three plans presented to respondents, between 39% and 90% said they wanted to see their company introduce the following services, with their associated outputs and costs:

- *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* (improvements ranging from £3-£70 for the majority of plans);
- *maintaining water pipes, treatment works and reservoirs* (typically maintaining current service, ranging from £0-£37);
- *avoiding the risk of homes and gardens being flooded with sewage* (typically improvements ranging from £1-£9); and
- *managing the pressure of water in your taps and the number of unplanned interruptions* (typically maintaining current service, ranging from £0-£5);

5.2.7 The average proportions nationally wanting to see improvements in these four services were, respectively, 59%, 59%, 57% and 57%.

5.2.8 Service elements wanted by fewer customers, though still, in most cases, the majority (49-55%) across all companies were:

- *managing the amount of water taken from the environment to supply customers* (52-55% for, typically, maintaining the current service, ranging from £0-£11);
- *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* (49-55% for, typically, improvements, ranging from £0-£89); and

- *handling customers' accounts, queries, complaints and customers with special needs* (52-54% for, typically, maintaining the current service, ranging from £0-£2).

5.2.9 The average proportions nationally wanting to see improvements in these three services were, respectively, 54%, 52% and 53%.

5.2.10 The findings above reflect the priorities of customers at most companies. Exceptions to this are:

- Bristol Water: customers rank in their top five two environment outputs: *managing the effect of water company activities on the water quality of rivers, wetlands and coastal area'* and *managing the amount of water taken from the environment to supply customers*;

- South East Water, Cambridge Water, Essex & Suffolk Water, Tendring Hundred Water, Bournemouth & West Hampshire Water, Yorkshire Water, Dee Valley Water: customers rank in their top four outputs: *avoiding the risk of homes and gardens being flooded with sewage.* (For South East Water customers, this service output is the most important of all);

- Severn Trent Water and United Utilities Water: customers have a greater inclination to see the proposed outputs for *managing the pressure of water in taps and the number of unplanned interruptions* than customers nationally.

5.2.11 Customers of Folkestone and Dover Water were most keen to see each element of each of the proposed plans (typically, 80-90% wanted each service element). Customers of Dŵr Cymru Water were least enthusiastic about service areas concerned with tap water delivery (typically, 45-55% wanted each service element). And customers of Anglian Water were least enthusiastic about the other service elements offered within the Company Preferred Plan (typically, 45-55% wanted each service element)

5.3 Company Preferred Plan

5.3.1 Responses to each Company's Preferred Plan are shown at national level, for England and Wales and by customer segment in the Tables 5.1 and 5.2. The minimum and maximum proportions of customers saying they wanted to see each feature included, across all 23 companies, are also shown.

5.3.2 Nearly half (45%) of customers selected all of the elements in their Company Preferred Plan. Whilst 37% of customers indicated that they wished to see some of them and 17% wanted to see none.

5.3.3 Overall, most customers (71% nationally) wanted *drinking water quality - ensuring the safety of tap water* to be included, and fewest (54%) wanted the planned output for *handling customers' accounts, queries, complaints and customers with special needs*. Customers' preferences to see the planned service outputs, nationally, were:

- *maintaining the quality and safety of the drinking water* (71%);

- *managing the appearance, taste and smell of tap water*, *ensuring a reliable and continuous water supply, maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works, avoiding the risk of homes and gardens being flooded* *with sewage* and *managing the pressure of water in your taps and the number of unplanned interruptions* (64-58%);

- *managing the amount of water taken from the environment to supply customers, managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters,* and *handling customers' accounts, complaints and customers with special needs* (55-54%).

5.3.4 *Drinking water quality – ensuring the safety of tap water* was the element that the majority of customers wanted most in all but three companies. It came either first or second in the customers' rank-ordering (in terms of proportions of customers wanting each element included) in every company area except South Staffordshire Water, where it was ranked third.

Table 5.1 Percentage of Customers Wanting to See Each Element of the Company's Preferred Plan

Significantly different priorities	Service Area				Min. value across all companies	Max. value across all companies
Group 1	Ensuring the safety of tap water	71%	71%	63%	62%	91%
Group 2	Managing the appearance taste, and smell of tap water	64%	64%	59%	55%	88%
	Ensuring a reliable and continuous water supply	63%	63%	56%	54%	83%
	Maintaining sewerage pipes & treatment works, meeting new demands & controlling smells from sewage works	61%	62%	55%	52%	88%
	Maintaining water pipes, treatment works and reservoirs	60%	60%	54%	47%	90%
	Avoiding the risk of homes and gardens being flooded with sewage	59%	59%	54%	45%	85%
	Managing the pressure of water in your taps and interruptions to supplies	58%	58%	54%	49%	85%
Group 3	Managing the amount of water taken from the environment to supply customers	55%	55%	52%	46%	83%
	Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	55%	55%	53%	45%	79%
	Handling customers' accounts, complaints and customers with special needs	54%	54%	49%	41%	85%
	No. of respondents	**5440**	**5034**	**406**		

5.3.5 *Avoiding the risk of homes and gardens being flooded with sewage* came top of this rank-ordering in the South East Water area (Southern and Thames sewerage service providers), and second to top in Dee Valley Water(Dŵr Cymru sewerage service provider) and Essex and Suffolk Water (Anglian sewerage service provider). In most other areas, it ranked anywhere between third and ninth, in terms of proportions of customers wanting to see the company proposals included.

5.3.6 Other differences in customer views across different companies are evident from the detailed tables in the Appendix. Among them:

- *Managing the amount of water taken from the environment to supply customers* was ranked fourth in Bristol (by 63% of customers);

- *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* was ranked sixth in Yorkshire (60%);

- *handling customer accounts, complaints and customers with special needs* was ranked sixth in Cambridge (72%);

- significantly more respondents who receive water services from Wessex Water wanted *maintaining water pipes, treatment works and reservoirs*; *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works, avoiding the risk of homes and gardens being flooded with sewage* and *managing the amount of water taken from the environment to supply customers* to be included in the future plan;

- significantly fewer Anglian Water customers were concerned with including *avoiding the risk of homes and gardens being flooded with sewage* and *handling customer accounts, complaints and customers with special needs.* A significantly higher proportion of respondents who receive their water services from Cambridge Water wanted to a*voiding the risk of homes and gardens being flooded with sewage, handling customer accounts, complaints and customers with special needs* and *managing the amount of water taken from the environment to supply customers* included in future service plans.

5.3.7 For every service element, greater proportions of customers in Folkestone and Dover than in any other area said they wanted the company proposals to be included in their future services. The smallest proportions were found in Dŵr Cymru for *ensuring a reliable and continuous water supply* and *drinking water quality – ensuring the safety of tap water* (though this was the top priority among Dŵr Cymru customers), Three Valleys Water for *maintaining water pipes, treatment works, and reservoirs* and Anglian Water for all other service elements.

5.3.8 Responses were also analysed by customer segment. Higher proportions of urban residents and lower proportions of rural dwellers were in favour of including each of the service elements in the plan. Similarly, more customers who thought that current services represent good value for money, and fewer who thought the opposite, wanted each individual feature to be included on the plan. These differences are reported in Table 5.2.

5.3.9 These relationships between customers' rural or urban location, their ratings of value for money of current services, and their views on including elements of company plans are repeated in their responses to their company Reference Plans A and B.

Table 5.2 Percentage of Customers Wanting to See Each Element of the Company's Preferred Plan by Rural or Urban Location of Property and Current Value for Money Ratings

	Total	Location of Property			Current Value for Money Rating			
		Rural	Sub	Urban	Poor	Neither	Good	Don't know
Maintaining water pipes, treatment works and reservoirs	60%	55%	59%	65%	51%	56%	65%	49%
Ensuring a reliable and continuous water supply	63%	57%	64%	67%	55%	59%	68%	52%
Ensuring the safety of tap water	71%	64%	71%	75%	63%	69%	74%	62%
Managing the appearance taste, and smell of tap water	64%	60%	63%	69%	57%	64%	67%	60%
Managing water pressure in your taps and the number of unplanned interruptions	58%	52%	57%	64%	52%	55%	62%	48%
Handling customers' accounts, queries, complaints and customers with special needs	54%	46%	54%	59%	45%	48%	59%	45%
Maintaining sewerage pipes & treatment works, ensuring the network meets new demands and controlling smells from sewage works	61%	53%	62%	65%	52%	56%	67%	53%
Avoiding the risk of homes and gardens being flooded with sewage	59%	52%	60%	63%	52%	56%	63%	51%
Managing the amount of water taken from the environment to supply customers	55%	49%	55%	60%	46%	52%	60%	48%
Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	55%	50%	53%	62%	43%	53%	61%	50%
No of respondents	**5443**	**1275**	**2268**	**1817**	**986**	**1138**	**3031**	**288**

5.3.10 Views on including in the plan *managing amount of water taken from the environment to supply customers* and *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* varied by both socio-economic group and household income group. Preferences for including proposals for both these elements in future service plans were greater among customers in higher household income bands and socio-economic group AB. Preferences were least in the lowest income group and socio-economic group DE. Similar relationships between socio-economic group, household income and customers' views on including the proposals for these service elements are also evident in the responses to Reference Plans A and B.

5.3.11 There were also some significant differences according to age. Fewer of those aged under 25 said they wanted to *managing the pressure of water in your taps and the number of unplanned interruptions* in the plan. And customers aged over 65 were less concerned with including *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas*.

5.4 Reference Plan A

5.4.1 Respondent's views on their company's Reference Plan A are shown in Table 5.3. More than four in ten customers (44%) selected all of the elements in their company Reference Plan A. A further 38% of customers indicated that they wished to see some of them whilst 18% wanted to see none.

5.4.2 Overall, the pattern of customer preferences for including Reference Plan A elements was broadly similar to that for Company Preferred Plans, at the national level. Again, the three elements that most customers wanted were *drinking water quality – ensuring the safety of tap water, managing the appearance, taste and smell of tap water* and *ensuring a reliable and continuous water supply.* The first of these, however, was wanted by significantly more customers nationally than the other two.

5.4.3 Across all companies, the smallest proportion of customers that wanted to include *drinking water quality - ensuring safety of tap water* was in Dŵr Cymru (61%) and the biggest was in Folkestone and Dover (90%). This element was never ranked less than second (in terms of proportions of customers wanting it) in any company area.

5.4.4 As with the Company Preferred Plan, the three service elements that significantly fewest customers nationally wanted to include were *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas, managing the amount of water taken from the environment to supply customers* and *handling customers' accounts, complaints and customers with special needs*.

5.4.5 Folkestone and Dover Water customers were again exceptional. They were more likely to want almost all of the service elements included. The only elements that proportionately more customers in any other company area wanted were *ensuring a reliable and continuous water supply* (South Staffordshire Water) and *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* (Dee Valley Water). And again, the smallest proportions of customers wanting to include elements related to tap water were found in Dŵr Cymru (*drinking water quality – ensuring the safety of tap water, managing the appearance, taste and smell of tap water,* and *ensuring a reliable and continuous water supply).*

5.4.6 For six of the future changes proposed in the Reference Plans A there was no significant regional variation in response. Respondents' views on including proposals for *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* in the plan varied significantly across all regions and most companies. They ranged from 43% in the Southern Water area to 62% amongst customers of Wessex Water.

5.4.7 Wessex Water Customers also expressed a significantly higher demand for the proposals concerning *managing amount of water taken from the environment* to supply customers. Within the Wessex Water region, significantly higher proportions of respondents who receive water services from Wessex Water wanted to include proposals for *maintaining water pipes, treatment works and reservoirs*, *ensuring a reliable and continuous water supply*, *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewerage works, managing the amount of water taken from the environment to supply customers* and *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* in any future plan. Customers served by Bristol Water also showed a significantly higher than average demand for proposals concerning this last service element.

5.4.8 Respondents in the Southern Water area were significantly less keen to include proposals for *managing the pressure of tap water and the number of unplanned interruptions* and *handling customers' accounts, complaints and customers with special needs*. Within this region, customers of all the different water suppliers, with the exception of Folkestone and Dover Water and South East Water, showed a significantly lower demand for including proposals for *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* in the plan. A significantly higher proportion of respondents served by Folkestone and Dover Water wanted nearly every element on the proposed plan to feature.

Table 5.3 Percentage of Customers Wanting to See Each Element of the Company's Reference Plan A

Significantly different priorities	Service Area				Min. value across all companies	Max. value across all companies
Group 1	Ensuring the safety of tap water	70%	71%	63%	61%	90%
Group 2	Managing the appearance taste, and smell of tap water	64%	64%	56%	54%	88%
	Ensuring a reliable and continuous water supply	63%	63%	56%	54%	82%
Group 3	Maintaining water pipes, treatment works and reservoirs	59%	60%	52%	49%	88%
	Maintaining sewerage pipes & treatment works, meeting new demands & controlling smells from sewage works	59%	60%	54%	49%	86%
	Avoiding the risk of homes and gardens being flooded with sewage	57%	58%	52%	49%	85%
	Managing the pressure of water in your taps and interruptions to supplies	57%	57%	51%	46%	84%
Group 4	Managing the amount of water taken from the environment to supply customers	54%	54%	50%	44%	84%
	Handling customers' accounts, complaints and customers with special needs	53%	53%	48%	37%	83%
	Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	53%	53%	49%	40%	79%
	No. of respondents	**5434**	**5028**	**406**		

5.4.9 Responses were also analysed by customer segment. For each of the proposed elements in Reference Plan A, a higher proportion of urban residents and a lower proportion of rural dwellers wanted to include the service element within their company's plan. Similarly, a higher proportion of those who thought that current services were good value for money, and fewer of those respondents who thought that present provision was poor value for money, wanted each feature to be included on their plan. These differences are reported in Table 5.4.

Table 5.4 Percentage of Customers Wanting to See Each Element of Reference Plan A by Location of Property and Current Value for Money Ratings

	Total	Location of Property			Current Value for Money Rating			
		Rural	Sub	Urban	Poor	Neither	Good	Don't know
Maintaining water pipes, treatment works and reservoirs	59%	55%	59%	63%	51%	57%	64%	49%
Ensuring a reliable and continuous water supply	63%	58%	63%	67%	56%	60%	68%	52%
Ensuring the safety of tap water	70%	65%	70%	74%	61%	71%	74%	66%
Managing the appearance taste, and smell of tap water	64%	60%	64%	67%	55%	64%	67%	59%
Managing water pressure in your taps and the number of unplanned interruptions	57%	51%	57%	61%	50%	55%	61%	45%
Handling customers' accounts, queries, complaints and customers with special needs	53%	46%	53%	58%	46%	50%	58%	45%
Maintaining sewerage pipes & treatment works, ensuring the network meets new demands and controlling smells from sewage works	59%	52%	60%	63%	50%	56%	64%	51%
Avoiding the risk of homes and gardens being flooded with sewage	57%	52%	58%	60%	51%	56%	61%	51%
Managing the amount of water taken from the environment to supply customers	54%	48%	53%	59%	44%	53%	58%	45%
Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	53%	48%	50%	59%	40%	51%	58%	48%
No of respondents	**5440**	**1274**	**2266**	**1817**	**986**	**1137**	**3030**	**288**

5.4.10 Other significant differences in the views of customers in different segments were:

- support for including *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* and *managing amount of water taken from the environment to supply customers* in future service plans were greatest among customers in the highest household income band, and least among those in the lowest;

- demand for *managing amount of water taken from the environment to supply customers* was highest amongst customers in socio-economic groups A and B and lowest amongst those in socio-economic groups D and E; and

- fewer customers aged over 65 wanted to see the proposals for either *managing the amount of water taken from the environment to supply customers* or *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* included in the service plan.

5.4.11 There was a very similar pattern of response among non bill-payers.

5.5 Reference Plan B

5.5.1 Customers' views on their company's Reference Plan B are shown in Table 5.5. Again, more than four in ten (42%) of customers selected all elements in their Reference Plan B. A further 38% wanted some service elements and one in five customers (20%) did not want to see any of the planned outputs.

Table 5.5 Percentage of Customers Wanting to See Each Element of Reference Plan B

Significantly different priorities	Service Area				Min. value across all companies	Max. value across all companies
Group 1	Ensuring the safety of tap water	69%	69%	57%	54%	90%
Group 2	Managing the appearance taste, and smell of tap water	63%	63%	51%	48%	88%
	Ensuring a reliable and continuous water supply	62%	62%	51%	49%	85%
Group 3	Maintaining water pipes, treatment works and reservoirs	58%	59%	47%	44%	89%
	Maintaining sewerage pipes & treatment works, meeting new demands & controlling smells from sewage works	58%	58%	47%	45%	85%
	Avoiding the risk of homes and gardens being flooded with sewage	56%	56%	46%	43%	85%
	Managing the pressure of water in your taps and interruptions to supplies	55%	56%	46%	39%	85%
	Managing the amount of water taken from the environment to supply customers	52%	52%	46%	35%	83%
	Handling customers' accounts, complaints and customers with special needs	52%	52%	42%	31%	85%
Group 4	Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	49%	50%	44%	31%	77%
	No. of respondents	**5431**	**5026**	**405**		

5.5.2 There were some differences in overall responses, compared with the other two plans. The rank ordering of all elements, in terms of customer proportions nationally wanting each, is almost exactly the same across all three plans. But significantly fewer customers nationally (49%, compared with 54% and 53% for the Company Preferred Plan and Reference Plan A) wanted to include the Reference Plan B proposals for *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas*.

5.5.3 This element of Reference Plan B was not ranked higher than eighth (in terms of how many customers wanted it) in any company area except for Bristol. There, it was the second most wanted service element, after *drinking water quality – ensuring the safety of tap water*.

5.5.4 *Drinking water quality – ensuring the safety of tap water* was the service element wanted by most customers at 20 of the 23 companies. *Ensuring a reliable and continuous water supply* was the most supported service element amongst customers at South Staffordshire Water (80% wanted to see the planned service output) and at South East Water (65%); and *managing the appearance, taste and smell of tap water* was the most popular planned service output amongst Cambridge Water customers (77%).

5.5.5 Responses were also analysed by customer segment. As was the case with the Company Preferred Plan and Reference Plan A, bigger proportions of urban residents and smaller proportions of rural dwellers were in favour of including each of the service elements (as shown by Table 5.6). Similarly, more customers who thought that current services represent good value for money, and fewer who thought the opposite, wanted each individual element of Reference Plan B to be included.

Table 5.6 Percentage of Customers Wanting to See Each Element of Reference Plan B by Urban or Rural Location of Property and Current Value for Money Ratings

	Total	Location of Property			Current Value for Money Rating			
		Rural	Sub	Urban	Poor	Neither	Good	Don't know
Maintaining water pipes, treatment works and reservoirs	58%	53%	57%	63%	50%	56%	62%	49%
Ensuring a reliable and continuous water supply	62%	56%	61%	67%	55%	59%	66%	52%
Ensuring the safety of tap water	69%	63%	68%	73%	61%	68%	72%	64%
Managing the appearance taste, and smell of tap water	63%	59%	61%	67%	55%	61%	66%	57%
Managing water pressure in your taps and the number of unplanned interruptions	55%	48%	55%	60%	50%	53%	59%	44%
Handling customers' accounts, queries, complaints and customers with special needs	52%	43%	52%	57%	45%	48%	56%	42%
Maintaining sewerage pipes & treatment works, ensuring the network meets new demands and controlling smells from sewage works	58%	50%	58%	61%	48%	54%	62%	52%
Avoiding the risk of homes and gardens being flooded with sewage	56%	51%	56%	60%	49%	53%	60%	50%
Managing the amount of water taken from the environment to supply customers	52%	47%	50%	58%	43%	51%	56%	46%
Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	49%	45%	46%	57%	38%	47%	54%	48%
No of respondents	**5435**	**1273**	**2264**	**1817**	**984**	**1135**	**3029**	**288**

5.5.6 And again, preferences for including *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* and *managing amount of water taken from the environment to supply customers* in future service plans were stronger among customers in higher household income bands. Relatively few customers aged over 65 wanted to see the planned outputs for *managing amount of water taken from the environment to supply customers*, *managing the effect of water company activities on the water quality of rivers, wetlands and coastal areas* or *handling customers' accounts, complaints and customers with special needs*.

5.5.7 There was a very similar pattern of response towards Reference Plan B among non-bill-payers.

5.6 Service Areas where Customers Want to See More of An Improvement

5.6.1 After being shown the different plan proposals, respondents were asked to select any service areas where they would like to see more of a service improvement. Findings are shown at a national level, with the company range in Table 5.7.

5.6.2 The majority of customers (62%) nationally said that there were no areas in need of more improvement. The element that most customers wished to see more improvement in was *drinking water quality – ensuring the safety of tap water*.

5.6.3 In most company areas the proportions of customers favouring more improvement in any of the service elements was not more than 12%. Exceptionally high proportions were found in:

- the United Utilities Water area, where 25% wanted more improvement in *drinking water quality – ensuring the safety of drinking water* and 22% wanted more improvement in *managing the appearance, taste and smell of tap water*;

- Bristol, where 19% wanted more improvement in *managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters;* and
- Mid Kent, where 18% wanted more improvement in *avoiding the risk of homes and gardens being flooded with sewerage*".

5.6.4 For all but six service areas views differed across the regions. Differences were particularly marked in the United Utilities Water area. Significantly higher proportions of these respondents wanted more improvement in *drinking water quality – ensuring the safety of tap water, managing the appearance, taste and smell of tap water, managing pressure of water and the number of unplanned interruptions, handling customers' accounts, complaints and customers with special needs* and *maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewerage works*.

Table 5.7 Service Areas Where Customers Want to See More of an Improvement

Significantly different priorities	Service Area				Min. value across all companies	Max. value across all companies
Group 1	Ensuring the safety of tap water	13%	13%	16%	2%	25%
Group 2	Managing the appearance taste, and smell of tap water	12%	12%	8%	2%	22%
Group 3	Maintaining sewerage pipes & treatment works, meeting new demands & controlling smells from sewage works	7%	7%	8%	2%	10%
Group 4	Avoiding the risk of homes and gardens being flooded with sewage	6%	5%	9%	1%	18%
	Managing the pressure of water in your taps and interruptions to supplies	6%	6%	7%	2%	11%
	Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	6%	5%	8%	1%	19%
	Maintaining water pipes, treatment works and reservoirs	5%	5%	5%	1%	11%
	Ensuring a reliable and continuous water supply	5%	5%	5%	0%	10%
	Handling customers' accounts, complaints and customers with special needs	4%	5%	3%	0%	8%
	Managing the amount of water taken from the environment to supply customers	4%	4%	4%	0%	7%
Group 5	Upgrade water pipes	2%	2%	0%	0%	5%
	(Further) reduce limescale in water	1%	2%	0%	0%	8%
	(Further) reduce sewerage drainage problems	1%	1%	0%	0%	5%
	Reduce chemical treatments in water supply	1%	1%	2%	0%	3%
	(Further) reduce sewerage treatment works smells	1%	1%	0%	0%	6%
	Introduce option of having a water meter	1%	1%	0%	0%	5%
	No, none	62%	61%	68%	48%	80%
	No. of respondents	**5439**	**5034**	**405**		

5.6.5 Responses were also analysed by customer segment. The results indicate that customers with low household incomes were less inclined to want further improvements beyond those described in their company's Plans.

6

6 Perceived Value for Money of Each Plan

6.1 Question Context

6.1.1 Customers were asked whether they thought that each of the three plans that they were presented with offered good or poor value for money. As explained in Chapter Two, each plan was described in terms of ten planned service outputs and their associated costs. The planned outputs and costs that were presented to each respondent varied across the three plans and for each company. The bill increase ranged from an additional £29 to an increase of £204, and the number of improvements proposed ranged from four to seven.

6.2 Summary Findings

6.2.1 At a national level, 45% of customers considered that their Company's Preferred Plan represented "extremely", "very" or "fairly good value for money". Similarly, 46% of customers considered that their company's Reference Plan A represented (extremely, very or fairly) good value for money, whilst a significantly lower proportion (37%) thought this about Reference Plan B. In contrast, and as indicated above, 55% of customers thought their current service offers extremely, very or fairly good value for money.

6.2.2 The proportions that thought their company's Preferred Plan and Reference Plan A represented "extremely", "very" or "fairly poor value for money" were around 30%, in each case. Customer reactions to Reference Plan B, overall, were generally more negative. Some 40% of customers considered their company's Reference plan B to offer "extremely", "very" or "fairly" poor value for money. And more customers nationally considered their Reference Plan B to offer poor value for money than held the opposite view. Between one in ten and one in three customers (9-31%, with an average of 20%) said the plans that they were presented with offer 'neither poor nor good value for money', or were otherwise undecided.

6.2.3 Especially positive value for money responses were reported for the following companies and plans:

- Dee Valley Water: 64% of customers considered their Company Preferred Plan (with a bill increase of £57) to offer "extremely", "very" or "fairly" good value for money, 70% Reference A (+£42), 65% Reference B (+£52) [compared with 71% for current];

- South Staffordshire Water: 63% Company Preferred (+£31), 60% Reference A (+£25)[compared with 58% for current];

- Yorkshire: 62% Reference A (+£38) [compared with 63% for current]; and

- Sutton and East Surrey Water: 60% Company Preferred (+£31) [compared with 67% for current].

6.2.4 Relatively few positive value for money responses were reported for the following companies and plans:

- Folkestone and Dover Water: 21% of customers considered their Reference A Plan (with a bill increase of £130) to offer "extremely", "very" or "fairly" good value for money, 10% Reference B (+£160) [compared with 54% for current];

- Southern Water: 22% Reference A (+£102), 12% Reference B (+£149) [compared with 60% for current];

- South West Water: 23% Reference A (+£80), 18% Reference B (+£89) [compared with 37% for current].

6.2.5 Customers of all but one company felt that Reference Plan B offered poorer value for money than Reference Plan A or the Company Preferred Plan. Indeed, at Folkestone and Dover Water and Southern Water, as few as one in ten customers (10-12%) considered their company's Reference Plan B to offer good value for money. Only at Three Valleys Water did customers consider Reference Plan B to offer better value for money than the company's Company Preferred Plan.

6.2.6 For 20 of the 23 companies, the proportion of customers who said that their current services provide good value for money exceeded the proportions who said that any of the three plans offered good value for money. However, for three companies this was not the case:

- Bristol Water (53% consider the current service to offer good value for money compared with 59% Company Preferred; 61% Reference A and 57% Reference B);

- South Staffordshire Water (58% consider the current service to offer good value for money compared with 63% Company Preferred and 60% Reference A); and

- South East Water (46% consider the current service to offer good value for money compared with 49% Reference A).

6.3 Company Preferred Plan

6.3.1 Customers perceptions of the Company Plan that they were each presented with, in terms of value for money, are reported at a national level in Table 6.1. Just under half (45%) of customers overall considered their company's Preferred Plan to offer "fairly", "very" or "extremely good" value for money. The proportion taking the opposite view was 30%. Around one in every four customers (26%) considered the proposals to offer "neither poor nor good value for money" or were otherwise undecided. The patterns of views in England overall, and in Wales, were not significantly different.

6.3.2 The pattern of responses from non bill-payers was similar, except that significantly more non bill-payers than bill-payers answered "don't know/can't say" to this question (14% compared with 5%). Just over a third (36%) of them considered their company's Preferred Plan to be "fairly", "very" or "extremely good" value for money, and 25% rated it "fairly", "very" or "extremely poor" value.

Table 6.1 Perceived Value for Money of Company Preferred Plan

				Min. value across all companies	Max. value across all companies
Extremely poor value	6%	6%	4%	2%	11%
Very poor value	9%	9%	13%	4%	14%
Fairly poor value	15%	15%	13%	8%	27%
Neither poor/good value	21%	21%	19%	12%	31%
Fairly good value	33%	33%	34%	21%	45%
Very good value	10%	10%	12%	3%	21%
Extremely good value	2%	2%	1%	0%	6%
Dont know/cant say	5%	5%	3%	0%	11%
TOTAL	100%	100%	100%		
No. of respondents	**5433**	**5027**	**406**		

6.3.3 Comparing all 23 companies, the proportions of customers that considered their Company's Preferred Plan represents "extremely", "very" or "fairly good" value for money ranged from 26% (Cambridge Water – with an average bill increase of +£100) to 63% (South Staffordshire Water, +£31). The proportions that considered their Company's Preferred Plan represents "extremely", "very" or "fairly poor" value for money ranged from 16% (Sutton and East Surrey Water, +£31) up to 59% (South West Water, +£73).

6.3.4 In some companies, the proportion of customers considering the Company Preferred Plan to offer good value for money outweighed the proportion stating the opposite view. This was the case for South Staffordshire Water, Sutton and East Surrey Water and Dee Valley Water (+£57). However, the reverse was true for South West Water, Anglian Water (+£102) and Cambridge Water (+£100), where more customers thought the Company preferred Plan offered poor value for money.

6.3.5 Comparing views on value for money of the Company Preferred Plan in different customer segments, customers aged between 18 and 24 were more likely to rate this as "fairly good value". The same was true for customers who considered that their current service represents good value for money.

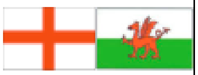
6.3.6 Some statistically significant differences were also apparent in the spread of opinions according to gender, age, socio-economic group and rural/sub-urban/urban. However, the balance of views in each group broadly matched the overall pattern, at national level.

6.4 Reference Plan A

6.4.1 Table 6.2 shows customers' perceptions of the value for money of their company's Reference Plan A. Nationally, 46% felt this service plan provided "fair" to "extremely good" value for money, and 31% felt it provided "extremely poor" to "fairly poor" value for money. About two in ten customers felt it provided "neither good nor bad" value for money. All these proportions, at national level, are closely similar to those for Company Preferred Plans.

6.4.2 Again, there was a similar pattern for non bill-payers, with 44% considering the plan to be "extremely", "very" or "fairly good" value for money and 21% giving opposite views. Significantly more non bill-payers than bill-payers said they "don't know/can't say" (15% compared with 4%).

Table 6.2 Perceived Value for Money of Reference Plan A

				Min. value across all companies	Max. value across all companies
Extremely poor value	6%	6%	7%	1%	13%
Very poor value	10%	9%	**14%**	4%	19%
Fairly poor value	15%	15%	12%	8%	27%
Neither poor/good value	19%	19%	18%	9%	29%
Fairly good value	34%	34%	34%	18%	43%
Very good value	10%	9%	12%	1%	28%
Extremely good value	2%	2%	1%	0%	5%
Dont know/cant say	4%	5%	**1%**	0%	10%
TOTAL	100%	100%	100%		
No. of respondents	**5433**	**5027**	**406**		

6.4.3 The pattern of bill payer responses was however very different across the companies. The proportions of customers that considered their Reference Plan A represents "extremely", "very" or "fairly poor" value for money ranged from 19% (Northumbrian Water, Bristol Water and Dee Valley Water – with average bill increases of+ £70, +£21 and +£42 respectively) to 53% (South West Water, +£80). The proportions that considered their Reference Plan A represents "extremely", "very" or "fairly good" value for money ranged from 21% (Folkestone and Dover Water, +£130) up to 70% (Dee Valley Water, +£42).

6.4.4 For three companies, the proportion of customers that said their Reference Plans A offer good value for money far exceeded the proportion that took the opposite view. These companies were Dee Valley Water (with an average bill increase of +£42), Bristol Water (+£21) and Yorkshire Water (+£38). In contrast, for three other companies, reverse was true. These were South West Water (with an average bill increase of +£80), Southern Water (+£21) and Folkestone and Dover Water (+£130).

6.4.5 Perceptions of value for money of Reference Plan A also vary according to customers' characteristics. The patterns of variation are quite similar to those that applied to Company Preferred Plans.

6.4.6 Customers with a household income of less than £10,000 were more likely to rate their Reference Plan A as providing "extremely poor" to "neither poor nor good" value for money. Customers with a household income between £10,000 and £30,000+, however, were more likely to say that this service plan provided "fairly good" or "very good" value for money.

6.4.7 The way in which customers rated Reference Plan A in terms of value for money strongly reflects their ratings of the value for money of their current service.

6.4.8 As was found with Company Preferred Plans, the patterns of results according to breakdowns by gender, age, socio-economic group and rural or urban location all broadly match national trends.

6.5 Reference Plan B

6.5.1 Table 6.3 shows customers' perceptions of the value for money of Reference Plan B. Nationally, 37% felt this service plan provided "fair" to "extremely good" value for money, and 40% felt it provided "extremely poor" to "fairly poor" value for money. About two in ten customers felt it provided "neither good nor bad" value for money.

6.5.2 Significantly fewer non bill-payers considered their Reference Plan B to be "extremely poor" value for money (5% non bill-payers compared with 11% bill-payers). Overall, 33% of non bill-payers considered their Plan B to be good value for money and 31% poor value. Significantly more non bill-payers selected the don't know/can't say category than bill-payers (14% compared with 5% respectively).

Table 6.3 Perceived Value for Money of Reference Plan B

				Min. value across all companies	Max. value across all companies
Extremely poor value	11%	11%	6%	2%	21%
Very poor value	12%	12%	20%	5%	24%
Fairly poor value	17%	17%	14%	9%	26%
Neither poor/good value	20%	20%	22%	10%	31%
Fairly good value	27%	27%	27%	7%	42%
Very good value	8%	8%	7%	1%	19%
Extremely good value	2%	2%	1%	0%	5%
Dont know/cant say	5%	5%	2%	0%	9%
TOTAL	100%	100%	100%		
No. of respondents	**5426**	**5020**	**406**		

6.5.3 Comparing all 23 companies, the proportions of customers that considered their Reference Plan B represents "extremely", "very" or "fairly poor" value for money ranged from 21% (Three Valleys Water, with an average bill increase of +£52) to 64% (Southern Water, +£149). The proportions that considered their Reference Plan B represents "extremely", "very" or "fairly good" value for money ranged from 10% (Folkestone and Dover Water, +£160) up to 65% (Dee Valley Water, +£52).

6.5.4 For some companies, the proportion of customers that said their Reference Plan B offers good value for money far exceeded the proportion saying the opposite. This applied particularly to customers of Dee Valley Water, Bristol Water (+£27) and South Staffordshire Water (+£32). By contrast, in three other company areas, proportionately far more customers said that their Reference Plan B offers poor value for money. These were South West Water (+£89), Southern Water (£149) and Folkestone and Dover Water (+£160).

6.5.5 Customers' perceptions of value for money for Reference Plan B also varied by customer segment. The pattern of opinions was again quite similar to those for the Company Preferred and Reference Plans A.

6.5.6 As with these other Plans, customers with household incomes of less than £10,000 were more likely to rate Reference Plan B as "extremely poor" or "very poor" value. However as household income increases, customers tend to rate the value for money of the plan more favourably, with more customers with a household income of £30,000+ rating the service plan as "very good" value. Again, the way in which customers rated Reference Plan B in terms of value for money strongly reflects their ratings of the value for money of their current service.

6.5.7 Customers that were aged between 18 and 24 were much less likely to rate the service plan as "extremely poor" or "very poor" value for money, and more likely to rate it as "fairly good" value.

6.5.8 In addition, customers with water meters were more likely to rate Company Reference Plan B as "extremely poor value".

6.5.9 Some statistically significant differences were also apparent in the spread of opinions according to gender, age, socio-economic group and rural/sub-urban/urban. However, the balance of views in each group broadly matched the overall pattern, at national level.

6.6 Comparing Value for Money Across Plans

6.6.1 Table 6.3 compares customers' perceptions of value for money for the three Plans, at National level. As this indicates, the overall balance of customer opinion on Company Preferred Plans and Reference Plans A is very similar, but responses to Reference Plans B were significantly different. Customers tended to rate Plans B as offering less value for money.

Table 6.4 Customer Perceptions of Value for Money of the Three Plans

Proportions of Customers in England and Wales	Company Preferred Plans	Reference Plans A	Reference Plans B
Plan represents fairly, very or extremely **poor** value for money	30%	31%	40%
Plan represents fairly, very or extremely **good** value for money	45%	46%	37%
Average Increase in Bill Level	+£70	+£64	+£84

6.6.2 Proportionately more customers said their current service offers good value for money. Over half (55%) considered that their current service represents "extremely", "very" or "fairly good" value for money and only 18% said the opposite.

6.6.3 Although customers in most company areas felt their current service offers better value for money than any of their three company plans, in three company areas this was not the case:

- Bristol Water (53% consider the current service offers good value for money compared with 59% for their Company Preferred Plan; 61% for Reference Plan A and 57% for Reference Plan B);

- South Staffordshire Water (58% consider their current service offers good value for money compared with 63% for their Company Preferred Plan and 60% for Reference A); and

- South East Water (46% consider their current service offers good value for money compared with 49% for Reference A).

7 Customers Willingness to Pay for Each Plan

7.1 Question Context

7.1.1 Customers were asked to say how willing they would be to pay the amounts stated for the proposed changes in each plan that they were presented with (Company Preferred Plan, Reference Plan A, Reference Plan B). Those who said they would be "definitely" or "probably" unwilling to pay were then asked a further question, to identify reasons for this view. As explained in Chapter Two, each plan was described in terms of ten planned service outputs and their associated costs. The planned outputs and costs presented to each respondent varied across the three plans and for each company.

7.2 Summary Findings

Customers were asked to say how willing they would be to pay the amounts stated for the proposed changes in each plan that they were presented with (Company Preferred Plan, Reference Plan A, Reference Plan B). Those who said that they would be "definitely" or "probably" unwilling to pay were then asked a further question, to identify reasons for this view.

Overall, customers were more willing to pay for the Company Preferred Plan or Reference Plan A than Reference Plan B:

- Nationally, 46% of customers were probably willing and 14% of customers definitely willing to pay for Company Preferred Plan. 19% were probably not, and 14% definitely not willing to pay;
- Nationally, 46% of customers were probably willing and 14% definitely willing to pay for Reference Plan A. 20% were probably not, and 14% definitely not willing to pay; and
- Nationally, 41% of customers were probably willing and 12% definitely willing to pay for Reference Plan B. 22% were probably not, and 19% definitely not willing to pay.

For each of the three plans, across the 23 companies, the percentage of customers who were definitely willing to pay varied from around one in every 20 customers (3-5%) to more than one in four (25-29%).

In only one company did the proportion of customers <u>not</u> willing to pay for the Company Preferred Plan exceed the proportion who were. This compares with two companies in relation to the Reference Plan A. In ten company areas, the proportion of customers not willing to pay for Reference Plan B exceeded the proportion of customers who were willing-to-pay.

Customers' willingness to pay decreased as bill levels increased (both in absolute monetary terms and percentage terms). There was no relationship between customers' willingness to pay and the number of service improvements within each plan presented.

Customers on low incomes, in socio-economic categories D/E, and/or living in rural areas were least willing to pay for any of the company plans that they were presented with.

The majority of customers who indicated that they were probably or definitely not willing to pay for the plans said that this was because the improvements presented were not good enough compared with the cost, or that they could not afford it.

7.2.1 Just under one in every ten customers (9%) indicated that they were unable to afford any of the three plans that they were presented with. These customers were often from low income households, in socio-economic category D/E and elderly.

7.3 Company Preferred Plan

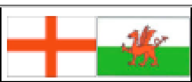
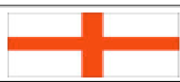
7.3.1 Responses to each plan are reported in Tables 7.1 to 7.6. Customers' views on their Company Preferred Plans are shown in Tables 7.1 and 7.2. Variations in customers' willingness to pay for their company's plan, across the different company areas, are shown in Figure 7.1.

7.3.2 Overall, 46% of all respondents nationally said they were "probably willing to pay" the stated bill price and 14% that they were "definitely willing to pay" for their Company Preferred Plan. One in five (19%) said they were "probably not willing to pay " and 14% that they were "definitely not willing to pay". The proportions in England and Wales were not significantly different.

7.3.3 Almost two-thirds of customers (65%) were **not** definite about their willingness to pay for their Company Preferred Plan (i.e., they indicated that they were "probably" willing or "probably not" willing to pay). Indeed, a majority of customers in all companies always fell into this non-definite category.

7.3.4 Significantly fewer non bill-payers were "probably" or "definitely willing to pay", but significantly fewer of them were also "definitely not willing to pay". This was because significantly more non bill-payers gave the answer "don't know/can't say" (28% compared with 7% of bill-payers).

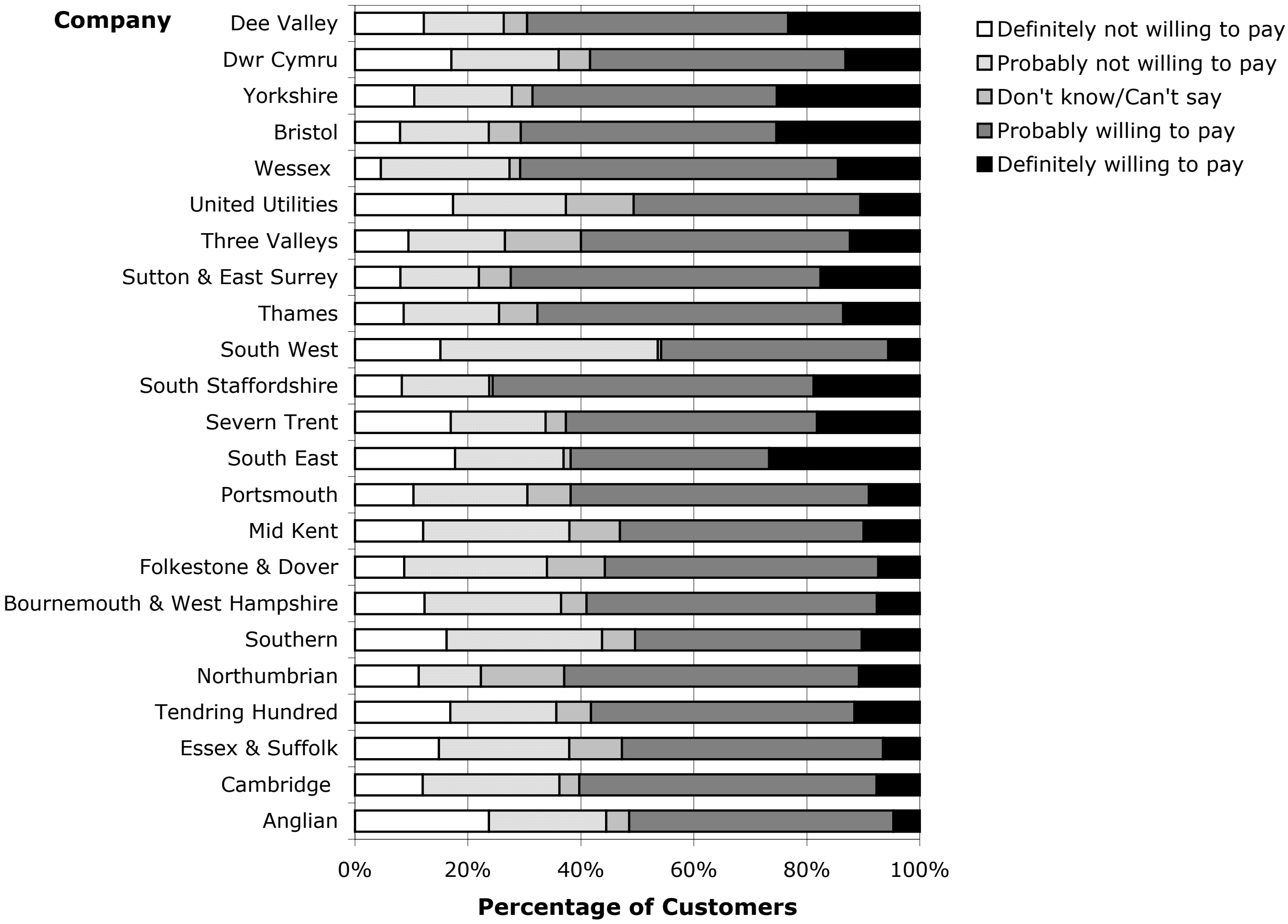
Table 7.1 Customers' Willingness to Pay for Company Preferred Plan

				**Min. value across all companies**	**Max. value across all companies**
Definitely not willing to pay	14%	14%	17%	5%	24%
Probably not willing to pay	19%	19%	19%	11%	38%
Probably willing to pay	46%	46%	45%	35%	57%
Definitely willing to pay	14%	14%	14%	5%	27%
Dont know/Cant say	7%	7%	5%	1%	15%
TOTAL	100%	100%	100%		
No. of respondents	**5437**	**5031**	**406**		

7.3.5 In just one Company area (South West Water, with an average bill increase of +£73), the proportion of customers not willing to pay exceeded the proportion of willing-to-pay customers (Figure 7.1).

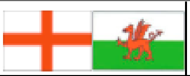
7.3.6 The proportions of customers who said they were "probably" or "definitely" willing to pay for their Company Preferred Plan exceeded 50% in all but one Company area (South West Water). The highest proportion of all was 76% (South Staffordshire Water, +£31). However, it was 70% or higher in another four Company areas: Dee Valley Water (+£57); Bristol Water (+£29); Wessex Water (+£32); and Sutton and East Surrey Water (+£31). It was also at least 60% in another eight: Cambridge Water (+£100); Northumbrian Water (+£76); Portsmouth Water (+£68); South East Water (+£89); Severn Trent Water (+£37); Thames Water (+£43); Three Valleys Water (+£41) and Yorkshire Water (+£41).

Figure 7.1 Customer Willingness to Pay for Company Preferred Plan by Company



7.3.7 Respondents who said they would be definitely or probably unwilling to pay the bill price stated for their Company Preferred Plan were asked about their reasons for this view. Over half answered that "the cost is too much for the improvements provided", and roughly one third said that "can't afford it". There was no significant regional or company variation in these proportions.

Table 7.2 Customers' Reasons if Not Willing to Pay for Company Preferred Plan

				**Min. value across all companies**	**Max. value across all companies**
Improvements not good enough	6%	6%	7%	0%	20%
Cost too much for improvements provided	53%	53%	51%	39%	78%
Cant afford it	35%	35%	42%	18%	48%
Too much & cant afford it	1%	1%	0%	0%	9%
Dont know/Cant say	5%	5%	0%	0%	10%
TOTAL	100%	100%	100%		
No. of respondents	**1803**	**1666**	**137**		

7.3.8 Responses to both questions were also analysed by customer segment. This demonstrated that:

- customers in socio-economic group AB were more willing to meet proposed price increases, whilst those in socio-economic group DE were least willing;
- those who had a household income of less than £10,000 were least willing to pay for the proposed service changes, whilst those respondent with a household income of over £30,000 were most willing to meet the cost;
- rural respondents were less willing to meet the cost of proposed changes than those living in an urban area; and
- customers who thought that current services were poor value for money were less willing to meet the proposed cost of their company's plan than those who thought the opposite.

7.3.9 Reasons why respondents said they would be unwilling to meet the proposed bill price for their Company Preferred Plan differed across all customer groups. In particular:

- males were more likely to say that the "cost is too much for the improvements provided" whilst more females stated that they "can't afford it";
- a greater proportion of those aged under 25 and over 65 said they "can't afford it" whilst more of those aged between 25 – 65 thought that "cost is too much for the improvements provided";
- customers in socio-economic group AB and those earning over £30,000 a year were more likely to say that the "cost is too much for the improvements provided", whilst more of socio-economic group DE and those earning less than £10,000 stated that they "can't afford it".

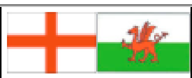
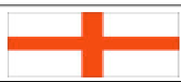
7.4 Reference Plan A

7.4.1 Respondents' views on their Reference Plan A are shown in Tables 7.3 and 7.4. Variation in customers' willingness to pay for this plan, across the different companies, is shown in Figure 7.2.

7.4.2 Overall, the proportions of all respondents nationally who said they were either "probably" or "definitely willing to pay" in relation to Reference Plans A (46% and 14% respectively) were the same as for the Company Preferred Plan. Again, one in five said they were "probably not willing to pay" and another 14% that they were "definitely not willing to pay". The proportions in England and Wales were slightly different, with more Welsh customers being unwilling to pay. However, this regional difference was only statistically significant because more of the English respondents said they "can't say/don't know'.

7.4.3 Significantly fewer non bill-payers said that they were "probably not" or "definitely not" willing to pay in relation to Reference Plans A, and significantly more of them said they "don't know/can't say" (26% compared with 6% of bill-payers).

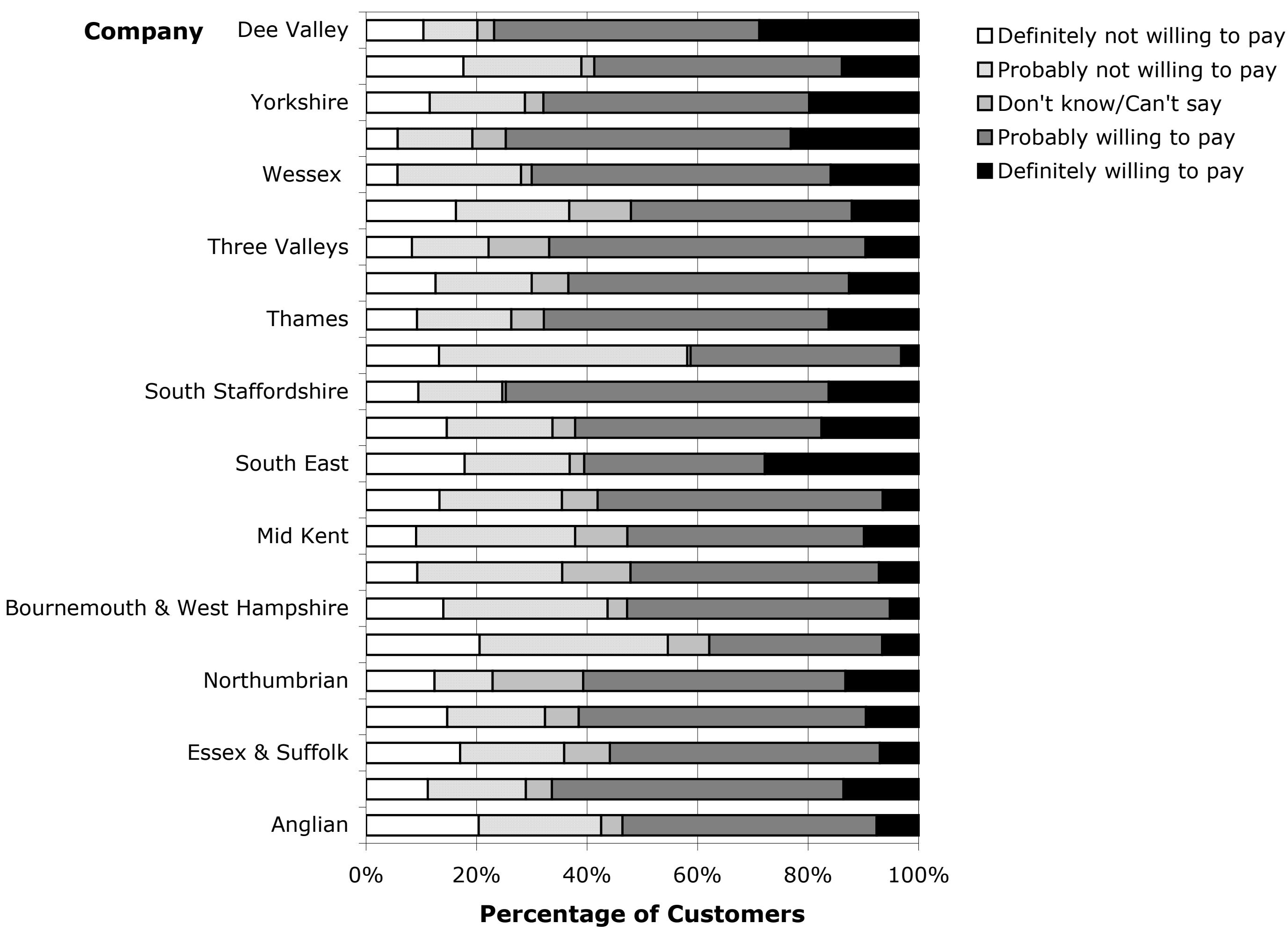
Table 7.3 Customers' Willingness to Pay for Company Reference Plan A

				**Min. value across all companies**	**Max. value across all companies**
Definitely not willing to pay	14%	13%	17%	6%	21%
Probably not willing to pay	20%	20%	20%	10%	45%
Probably willing to pay	46%	46%	45%	31%	58%
Definitely willing to pay	14%	14%	15%	3%	29%
Dont know/Cant say	6%	6%	**2%**	1%	16%
TOTAL	100%	100%	100%		
No. of respondents	**5435**	**5029**	**406**		

7.4.4 More customers were (probably or definitely) not willing to pay than were (probably or definitely) willing to pay in just two company areas (South West Water and Southern Water) – as shown in Figure 7.2.

7.4.5 The proportions of customers who said they were "probably" or "definitely willing to pay" for Reference Plan A exceeded 50% in all but one Company area (South West Water). The highest proportion of all was 77% (Dee valley Water, with an increase in bill level of +£42). However, it was at least 70% in another three Company areas: Bristol Water (+£21); Wessex Water (+£33); and South Staffordshire Water (+£25). It also exceeded 60% in another nine: Cambridge Water (+£76); Tendring Hundred Water (+£56); Northumbrian Water (+£70); South East Water (+£81), Severn Trent (+£31); Thames Water (+£38); Sutton and East Surrey Water (+£39); Three Valleys Water (+£19); and Yorkshire Water (+£38).

Figure 7.2 Customer Willingness to Pay for Reference Plan A by Company



7.4.6 Of the customers who said they would be “definitely” or “probably” unwilling to pay for Reference Plan A, over half said that “the cost is too much for the improvements provided”. More than a third (37%) indicated that they would be unwilling to meet the price increase as they “can’t afford it”. These responses were similar across the different regions and most companies.

Table 7.4 Customers’ Reasons if Not Willing to Pay for Reference Plan A

				Min. value across all companies	Max. value across all companies
Improvements not good enough	8%	8%	6%	1%	35%
Cost too much for improvements provided	51%	51%	51%	37%	71%
Cant afford it	37%	37%	41%	22%	46%
Too much & cant afford it	0%	1%	0%	0%	10%
Dont know/Cant say	3%	4%	1%	0%	6%
TOTAL	100%	100%	100%		
No. of respondents	**1829**	**1698**	**131**		

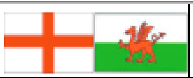
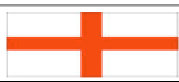
7.4.7 Responses to both questions were also analysed by customer segment. As was the case for the Company Preferred Plan, customers who were more willing to pay tended to be from socio-economic group AB, to have a household income of over £30,000, to live in an urban area, and to consider that their current water and sewerage service provision represents good value for money.

7.4.8 Among customers who indicated that they would be unwilling to meet the proposed bill price in Reference Plan A, the reasons stated were related to gender, age and income in the same ways as for the Company Preferred Plan.

7.5 Reference Plan B

7.5.1 Customers’ overall views on Reference Plans B are shown in Tables 7.5 and 7.6. The pattern of response for non bill-payers was similar to that for bill-payers. However, significantly fewer non bill-payers were “definitely not willing to pay” (13% compared with 19%) and significantly more non bill-payers selected the don’t know/can’t say category (26% compared with 6%).

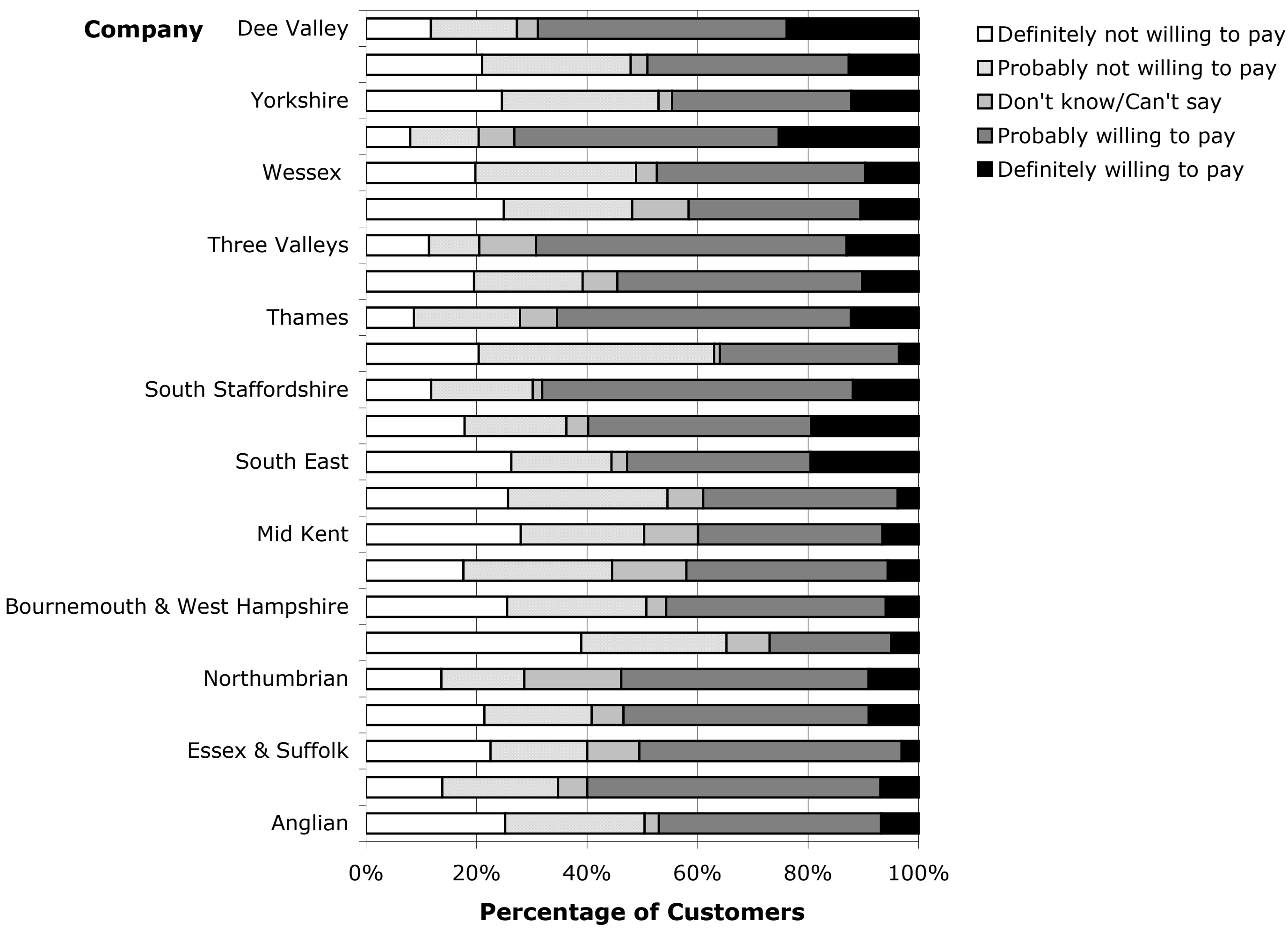
7.5.2 **Table 7.5 Customers’ Willingness to Pay for Reference Plan** B

				Min. value across all companies	Max. value across all companies
Definitely not willing to pay	19%	19%	20%	8%	39%
Probably not willing to pay	22%	21%	26%	9%	43%
Probably willing to pay	41%	41%	37%	22%	56%
Definitely willing to pay	12%	12%	14%	3%	25%
Dont know/Cant say	6%	6%	**3%**	1%	18%
TOTAL	100%	100%	100%		
No. of respondents	**5435**	**5029**	**406**		

7.5.3 Differences across companies in customers' willingness to pay for Reference Plan B are shown in Figure 7.3. In ten Company areas, the proportion of customers either probably or definitely not willing to pay exceeded the proportion of those that were either probably or definitely willing to pay. These were: Anglian Water; Southern Water; Bournemouth and West Hampshire Water; Folkestone and Dover Water; Mid Kent Water; Portsmouth Water; South West Water; United Utilities Water; Wessex Water and Yorkshire Water.

7.5.4 This compares with only two companies (South West Water and Southern Water) in relation to the Reference Plans A, and just one (South West Water) for the Company Preferred Plans.

Figure 7.3 Customer Willingness to Pay for Reference Plan B by Company



Those respondents who answered that they would be "definitely" or "probably" unwilling to pay for the Reference Plan B were asked a further question to find out possible reasons for this view. Of such respondents, over half answered that "the cost is too much for the improvements provided". More than a third of respondents also indicated that they would be unwilling to meet the price increase as they "can't afford it".

Table 7.6 Customers' Reasons if <u>Not</u> Willing to Pay for Company Reference Plan B

				Min. value across all companies	Max. value across all companies
Improvements not good enough	6%	6%	10%	0%	26%
Cost too much for improvements provided	54%	54%	51%	40%	74%
Cant afford it	36%	37%	35%	20%	50%
Too much & cant afford it	1%	1%	0%	0%	8%
Dont know/Cant say	3%	3%	4%	0%	7%
TOTAL	100%	100%	100%		
No. of respondents	**2275**	**2118**	**157**		

7.5.5 Responses to both questions differed according to customer segment. Customers more willing to pay the bill price for Reference Plan B tended to be in socio-economic group AB, with a household income of over £30,000, living in an urban area, who thought that current services were good value for money.

7.5.6 Among customers who indicated that they would be unwilling to meet the proposed bill price in Reference Plan B, their reasons were related to gender, age and income in the same way as shown for the Company Preferred Plan. However these did not vary according to their rural or urban location.

7.6 Comparing Customers' Willingness to Pay Across Plans

7.6.1 Table 7.7 below compares the proportions of customers who were willing and unwilling to pay, across all three Plans. The level of customer willingness to pay is lowest for Reference Plan B, which had the highest associated bill increase - £84 on average. (In the previous chapter, we reported that more customers also considered Reference Plan B to offer poor value for money).

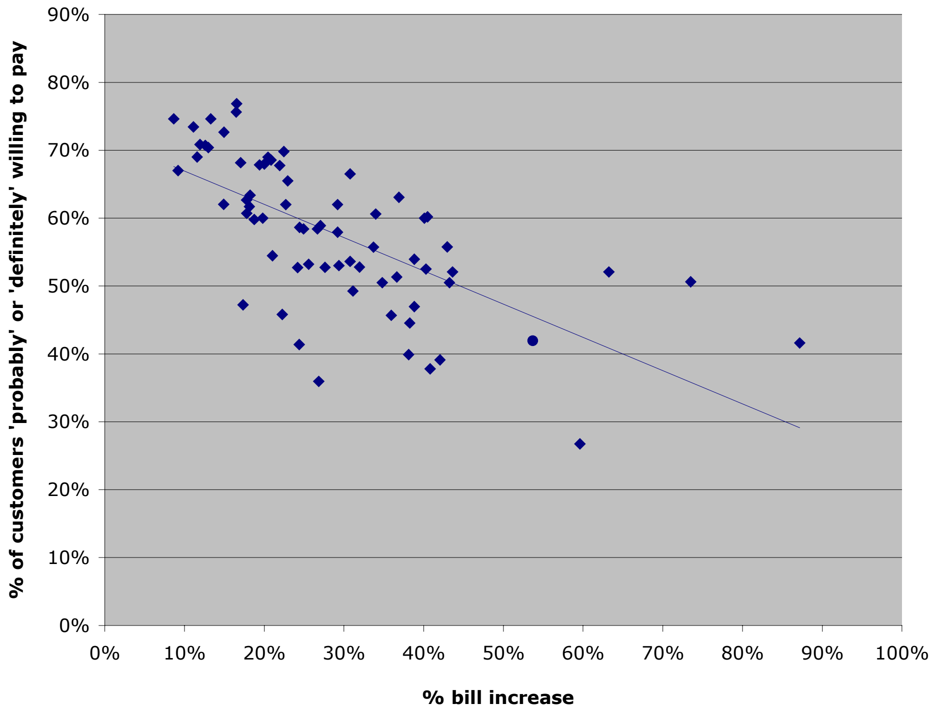
Table 7.7 Customers' Willingness to Pay for the three Company Plans

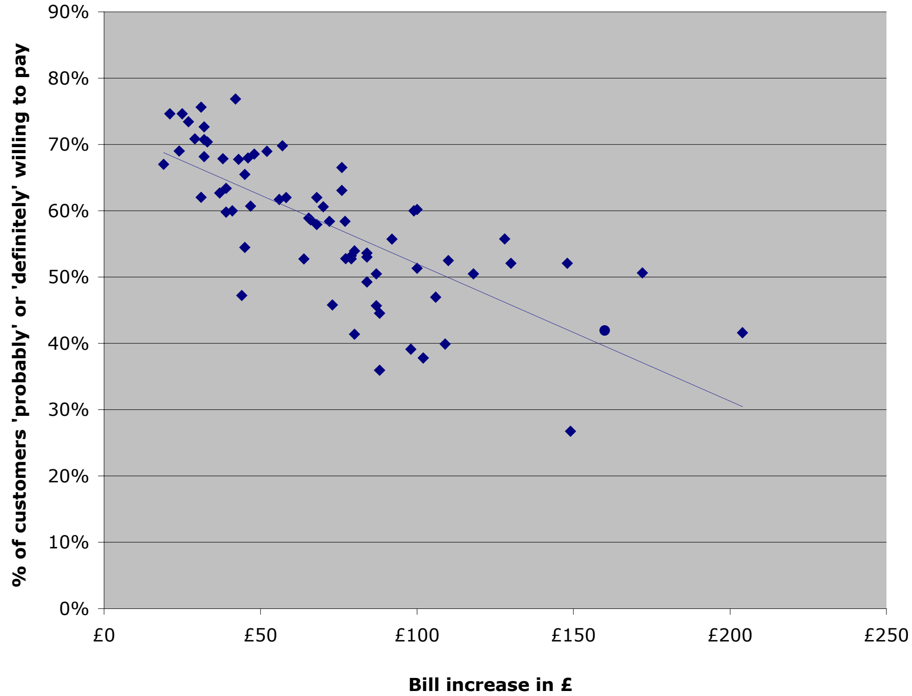
Proportions of Customers in England and Wales	**Company Preferred Plans**	**Reference Plans A**	**Reference Plans B**
Probably or definitely **not** willing to pay	33%	34%	41%
Probably or definitely willing to pay	60%	60%	53%
Average Increase in Bill Level	+£70	+£64	+£84

7.6.2 A significant minority of customers (9%) indicated that they could not afford any of the plans presented to them. This group included higher than average proportions of customers who were elderly (33% aged 65+), from low income households (38% in the less than £10,000/annum category) and socio-economic groups D and E (59%).

7.6.3 To explore further whether customers' value for money and willingness to pay ratings are affected by the associated bill increase, or the proposed service outputs, or both, we created a series of scattergrams. Figure 7.4 shows (for all three plans and for all 23 companies) a strong relationship between customers' willingness to pay (i.e., the proportion of customers who were either "probably" or "definitely willing to pay") and their average bill price increase (in both monetary and percentage terms). When this analysis was repeated for only those respondents who were "definitely" willing to pay, the relationship between bill price and willingness to pay proved weaker but the graph had a steeper gradient, suggesting an underlying higher sensitivity to bill price. No relationship was found between customers' willingness to pay and the number of improvements within each plan, nor between the average bill increase and the number of improvements within each plan.

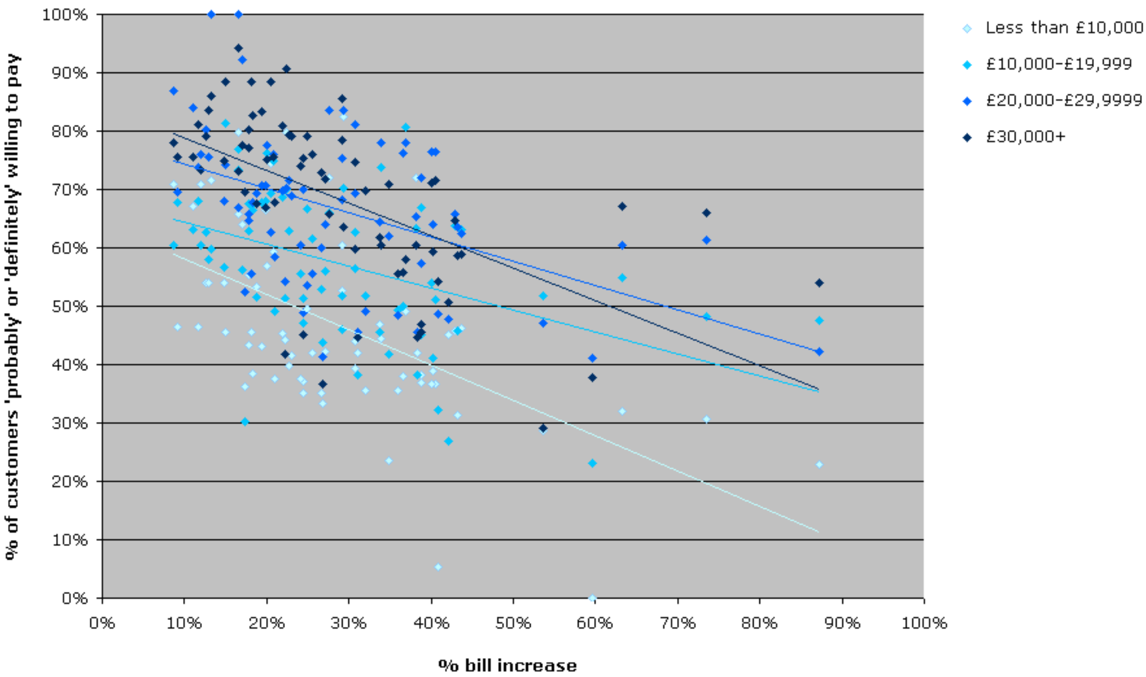
Figure 7.4 Customer Willingness to Pay by Percentage Bill Increase and Absolute Bill Increase





7.6.4 The results shown in Figure 7.5 indicate that customers with lower household incomes tend to be less willing to pay for service outputs across the range of (percentage) bill increases. This suggests a direct relationship between willingness to pay and ability to pay.

Figure 7.5 Customer Willingness to Pay by Percentage Bill Increase and Household Income



8

8 Concern Over Delay in Delivery

8.1 Question Context

8.1.1 Customers were asked to say how concerned they would be if the changes proposed by their companies in the three different service plans were delayed until after 2010, in order to keep bills down or to meet other priorities.

8.2 Summary Findings

8.2.1 Two in every five customers (40%), nationally, were "fairly", or "very", concerned over delay in delivery; whilst 50% were "not very", or "not at all", concerned.

8.2.2 Customers were divided on the degree to which they were concerned over service delivery delays beyond 2010. At company level, the degree of concern ranged from 7% (Three Valleys Water) to 27% (South East Water) who would be very concerned; and 19% (Anglian Water) to 45% (Portsmouth Water) who would be fairly concerned.

8.2.3 When asked which service areas would cause most concern if delayed, drinking water quality was the top concern for customers of all companies. This was followed by delays in maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works.

8.2.4 There was less concern over delays in managing the pressure of tap water and the number of interruptions; managing the amount of water taken from the environment to supply water to customers; and handling customers' accounts, queries, complaints and customers with special needs.

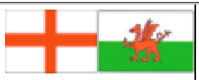
8.3 Timing of Changes

8.3.1 Nationally, 50% of customers were either "not at all concerned" or "not very concerned" by the prospect of a possible delay in the delivery of the proposed service delivery plans. Another 40% were "fairly concerned" or "very concerned" and 10% did not know or could not say whether they would be concerned or not.

8.3.2 The pattern of response was similar for non bill-payers, except that significantly more non bill-payers selected the "don't know/can't say" option (15% compared with 10% of bill-payers).

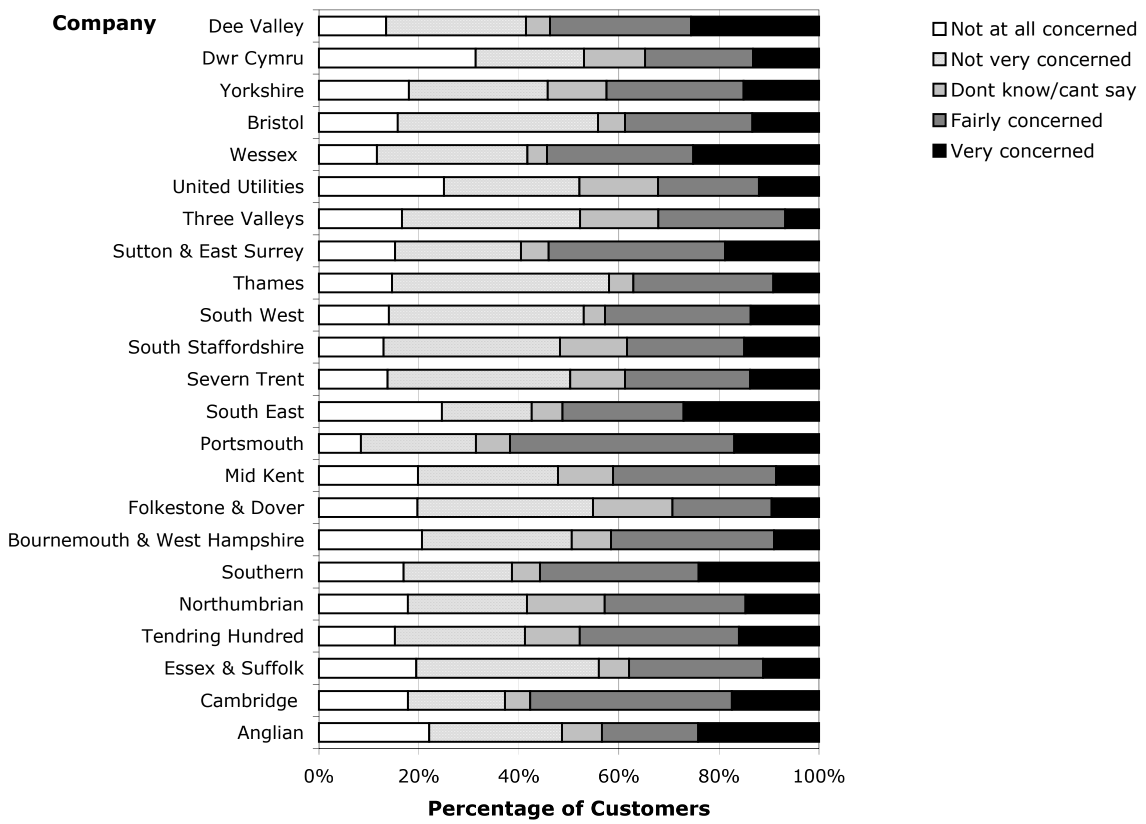
8.3.3 Table 8.1 shows the pattern of responses among customers nationally, and the range of variation across company areas. Customers in Dŵr Cymru (30% compared to 18% nationally) said that they did not feel at all concerned about possible delays in service delivery. There was however considerable variation within Wales. Although most customers served only by Dŵr Cymru Water were significantly less concerned than were customers from England and Wales as a whole, those whose water is provided by Dee Valley Water were significantly more concerned.

Table 8.1 Level of Concern if Some Improvements were Delayed

				**Min. value across all companies**	**Max. value across all companies**
Not at all concerned	18%	18%	**30%**	8%	31%
Not very concerned	32%	32%	**22%**	18%	43%
Fairly concerned	26%	26%	22%	19%	45%
Very concerned	15%	15%	14%	7%	27%
Dont know/cant say	10%	10%	12%	4%	16%
TOTAL	100%	100%	100%		
No. of respondents	**5434**	**5028**	**406**		

8.3.4 A comparison of customers' attitudes towards delays across all the company areas is presented in Figure 8.1.

Figure 8.1 Level of Concern if Some Improvements were Delayed by Company



8.3.5 There was considerable variation at company level across England and Wales. The proportion of customers "fairly" or "very concerned" by possible delays ranged from one-third (32%) at Three Valleys Water to almost two-thirds (62%) at Portsmouth Water.

8.3.6 In 14 company areas, the majority of customers were unconcerned, than concerned, over delays in delivery. The reverse was true in nine companies, however:

- Portsmouth Water (62% concerned, 31% not concerned);
- Cambridge Water (58% concerned, 37% not concerned);
- Southern Water (56% concerned, 39% not concerned);
- Sutton & East Surrey Water (54% concerned, 40% not concerned);
- Dee Valley Water (54% concerned, 41% not concerned);
- Wessex Water (54% concerned, 42% not concerned);
- South East Water (51% concerned, 43% not concerned);
- Tendring Hundred Water (48% concerned, 41% not concerned); and
- Northumbrian Water (43% concerned, 42% not concerned).

8.3.7 Some significant differences were found when customers' views were compared with their gender, age, socio-economic group, household income, whether they had a water meter, and their urban or rural location. In particular:

- Customers in socio-economic group AB were more likely to be "fairly" or "very concerned" by possible delays in service delivery. Customers from socio-economic group category DE on the other hand were more likely to be "not at all concerned" or "not very concerned".
- Customers with household annual incomes of between less than £10,000 and £20,000 were more likely to say that they were "not at all concerned" or "not very concerned". However, customers with household incomes between £20,000 and £30,000 were more likely to say that they were "fairly concerned".
- Customers who lived in rural areas were more likely to say that they were "not at all concerned" than suburban and urban dwellers.

8.4 Service Areas that Would Cause Most Concern if Delays in Delivery Occurred

8.4.1 Customers who expressed concern over delays in delivery, were then asked to state which three service elements would cause them the most concern if the delivery of this element was delayed. Table 8.2 shows how customers responded to this question. It indicates customer views at the national level, and the range of findings at company level. Again, service elements have been grouped to reflect differences in levels of concern that were found to be significant at the 99% level of confidence.

Table 8.2 Service Elements Causing Customers Greatest Concern Over Pace of Delivery

Significantly different priorities	Service Area				Min. value across all companies	Max. value across all companies
Grou p 1	Ensuring the safety of tap water	18%	18%	16%	9%	31%
Group 2	Maintaining sewerage pipes & treatment works, meeting new demands & controlling smells from sewage works	8%	8%	8%	4%	21%
Group 3	Ensuring a reliable and continuous water supply	6%	6%	6%	4%	12%
	Managing the appearance taste, and smell of tap water	5%	5%	5%	1%	10%
	Maintaining water pipes, treatment works and reservoirs	5%	5%	3%	2%	15%
	Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	4%	4%	6%	0%	11%
Group 4	Avoiding the risk of homes and gardens being flooded with sewage	3%	3%	3%	1%	14%
Group 5	Managing the amount of water taken from the environment to supply customers	2%	2%	1%	0%	6%
Group 6	Managing the pressure of water in your taps and interruptions to supplies	1%	1%	0%	0%	4%
Group 7	Handling customers' accounts, complaints and customers with special needs	0%	0%	1%	0%	1%
	No. of respondents	**5441**	**5035**	**406**		

8.4.2 In all companies, customers indicated that they would be most concerned about delays to the maintenance/improvement of *drinking water quality – ensuring the safety of tap water*. The proportion of customers concerned varied from just under one in ten among Folkestone and Dover Water customers (9%) to almost one in three of the Southern Water customers (31%).

8.4.3 *Maintaining sewers and sewage treatment works, ensuring the network can meet new demands and controlling smells from sewage works* was the next most urgent area of service delivery. Customers from over half the companies indicated that delays in the delivery of this service element would be their second greatest concern.

8.4.4 For most water companies, the two service elements identified above would cause greatest concern if there were delays in service delivery. Exceptions are:

- Severn Trent Water, South Staffordshire Water and Three Valleys Water: *drinking water quality – ensuring the safety of tap water* and *managing the appearance, taste and smell of tap water*;

- Bristol Water and Yorkshire Water: *drinking water quality – ensuring the safety of tap water* and *managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters*;

- Portsmouth Water and Wessex Water: *drinking water quality – ensuring the safety of tap water* and *ensuring reliable and continuous water supply*; and

- Mid Kent Water: *drinking water quality – ensuring the safety of tap water* and *avoiding the risk of homes and gardens being flooded by sewage*.

8.4.5 Customers of Cambridge Water (11%), Bristol Water (10%), Portsmouth Water (10%), Dee Valley (9%), Anglian Water (8%) and Yorkshire Water (8%) expressed concern over delays to *managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters*.

8.4.6 Results suggest that concern amongst customers would be negligible if there were delays in changing the service delivery of *handling customers' accounts, queries, complaints and customers with special needs*. No more than 1% of company customers expressed any concern over such a delay.

8.4.7 There would also be little concern expressed by customers, overall, if delays occurred in relation to *managing the pressure of water in taps and the number of unplanned interruptions*. Only 1% of customers, nationally, would be concerned, and the highest proportion in any company area was 4% (for South Staffordshire Water customers).

8.4.8 Some significant differences of view were expressed in different customer segments. In particular:

- men, and customers aged 65+, were much less likely to express a concern over the pace of delivery of improvements to drinking water quality; and
- as demonstrated in Table 8.3, customers from socio-economic group AB, and those with higher household incomes, were generally more concerned about possible delays to the delivery of any service element.

8.4.9 Attitudes were however similar among customers with or without a water meter, and irrespective of their urban or rural location.

Table 8.3 Service Elements Causing Customers Greatest Concern Over Pace of Delivery by SEG and Household Income

	Total	SEG			Household Income				
		AB	C	DE	<10K	10-20K	20-30K	30K+	Don't know
Maintaining water pipes, treatment works and reservoirs	5%	6%	5%	3%	2%	3%	6%	6%	5%
Ensuring a reliable and continuous water supply	6%	8%	5%	4%	3%	7%	5%	8%	5%
Ensuring the safety of tap water	18%	22%	17%	13%	9%	17%	20%	24%	17%
Managing the appearance taste, and smell of tap water	5%	7%	5%	4%	4%	4%	8%	5%	6%
Managing water pressure in your taps and the number of unplanned interruptions	1%	2%	1%	1%	0%	2%	1%	2%	1%
Handling customers' accounts, queries, complaints and customers with special needs	0%	0%	0%	0%	1%	0%	0%	0%	1%
Maintaining sewerage pipes & treatment works, ensuring the network meets new demands and controlling smells from sewage works	8%	10%	8%	4%	5%	7%	10%	10%	7%
Avoiding the risk of homes and gardens being flooded with sewage	3%	4%	3%	3%	3%	3%	4%	4%	3%
Managing the amount of water taken from the environment to supply customers	2%	4%	1%	1%	1%	1%	2%	3%	2%
Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	4%	8%	3%	1%	1%	2%	5%	9%	3%
No of respondents	**5443**	**1783**	**2027**	**1633**	**782**	**702**	**603**	**1089**	**2267**

9

9 Preferred Bill Profile

9.1 Question Context

9.1.1 Customers were told that bills are likely to change during the period 2005–2010 and whilst the overall bill total would remain the same, there could be several ways in which this cost could be incurred by customers. They were then shown a number of different 'bill profiles' and asked which one they would prefer.

9.2 Summary Findings

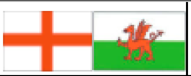
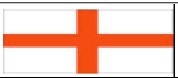
9.2.1 Over three quarters (78%) of customers, nationally, stated that they would prefer to see "bills change steadily every year throughout the period so that customers do not see big changes from year to year".

9.2.2 This was the preference of the majority of customers for each company. Indeed, some two-thirds of customers in each company expressed a preference for bills to change steadily every year throughout the period. This preference ranged from 88% (Sutton and East Surrey Water) and 86% (Portsmouth Water and Bournemouth and West Hampshire Water) to 68% (Tendring Hundred Water) and 67% (Three Valleys Water).

9.3 Bill Profile

Respondent's views are summarised in Table 9.1. Over three quarters (78%) of customers, nationally, stated that they would prefer to see "bills change steadily every year, throughout the period, so that customers do not see big changes from year to year".

Table 9.1 Customers' Preferred Bill Profile

				**Min. value across all companies**	**Max. value across all companies**
Bills change every year according to amount of work	12%	12%	14%	6%	21%
Bills show one big change in first year	10%	10%	7%	5%	20%
Bills change steadily every year	78%	78%	79%	67%	88%
TOTAL	100%	100%	100%		
No. of respondents	**5357**	**4958**	**399**		

9.3.1 This was the preference of the majority of customers in every company. At least two-thirds of customers in most company areas expressed a preference for bills to change steadily every year throughout the period. In some company areas the proportion was much higher. It ranged from 67% or 68% (Three Valleys Water and Tendring Hundred Water customers) to 86% of Portsmouth Water and Bournemouth and West Hampshire Water customers, and 88% of Sutton and East Surrey Water customers.

9.3.2 Preferences among bill profiles were also analysed by customer segment. This revealed some significant differences in customer opinion according to their age, socio-economic group and household income. There were no differences in relation to customers' urban or rural location or their views on the value for money of their current service. The pattern of differences in relation to age and household income is shown in Table 9.2.

Table 9.2 Customers' Preferred Bill Profile by Age and Household Income

	Total	Age				Household Income				
		18-24	25-44	45-64	65+	<10K	10-20K	20-30K	30K+	Don't know
Bills change every year according to amount of work	12%	15%	13%	13%	8%	10%	10%	15%	14%	11%
Bills show one big change in first year	10%	12%	9%	10%	10%	10%	13%	7%	9%	11%
Bills change steadily every year	78%	74%	78%	77%	81%	80%	77%	78%	78%	78%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
No of respondents	**5305**	**156**	**2076**	**2051**	**1022**	**776**	**697**	**592**	**1081**	**2191**

9.3.3 Attitudes among non bill-payers were closely similar, with 77% of respondents saying that bills should change steadily each year.

appendices

Appendix A

PR04 Customer Research Survey Material

(with example show material)

Serial number _____________

PERIODIC REVIEW: CUSTOMER SURVEY

Sample Point from Quota Sheet [WRITE IN]: ___________

Good morning/afternoon/evening. My name is .... from MVA, an independent research company working on behalf of the water regulators, companies, the government, the Welsh Assembly Government and consumer representatives. We are carrying out a survey regarding the current and future delivery of service by the company/ies responsible for water and sewerage services in your area. Would you mind answering a few questions; it should take about 20 minutes? **[SHOW INTRODUCTORY LETTER]**

[CHECK QUOTAS AND THAT RESPONDENT IS AGED 18 OR OVER]

S1 Are you responsible for paying your household's water and sewerage bills?

Yes, the bill-payer 1
Spouse or partner (jointly involved in finances) 2
Other 3

S2 What is your current working (or non-working) status?

Employed Full-time (30+ hrs) 1
Employed Part-time (9-29 hrs) 2
Retired 3
Not working and not looking for work 4
Student 5
Not working and looking for work 6
Other 7

S3 What is the occupation of the chief income earner in your household?
[ONLY ASK SUFFICIENT QUESTIONS TO CODE SOCIAL GRADE BELOW]

Occupation title

____

Position/Rank/Grade and No. of Staff Responsible for:

____

Industry/Type of Company:

____

Qualification/Degrees/Apprenticeships:

____

[CODE SOCIAL GRADE]:

AB .... 1 C1 .... 2 C2 .... 3 DE 4

QUOTA

Gender		**Working Status**		**SEG**	**Bill-Payer**	
Male	1	Employed (full-time)	1	A/B	Responsible for paying bills/	
Female	2	Retired	2	C1/C2	Spouse or partner	1
		Other	3	D/E	Other household member	2

SUPPLIER AND SERVICE AWARENESS

The water services in your area are supplied by _____________ and sewerage services are supplied by ______________. **[SEE INFORMATION CARD]**

Please take a look at this showcard **[SHOWCARD B]** these are the services that customers pay for in <u>water</u> and <u>sewerage</u> bills and the current levels of service in your area.

Q1 How satisfied are you with these water and sewerage services overall, on a scale from 1 to 7, where 1 means 'extremely dissatisfied' and 7 means 'extremely satisfied'? **[SHOWCARD A1]**

Extremely Dissatisfied 1
Very Dissatisfied.. 2
Fairly Dissatisfied 3
Neither Satisfied nor Dissatisfied... 4
Fairly Satisfied 5
Very Satisfied 6
Extremely Satisfied 7
Don't Know/Can't say.. 8

[OVERLAY PRICE ONTO SHOWCARD B]

Q2 This is the average bill for water and sewerage service in your area. How do you rate your water and sewerage services in terms of Value for Money, using a scale of 1 to 7 where 1 means 'extremely poor value for money' and 7 means 'extremely good value for money'? **[SHOWCARD A2]**

Extremely Poor Value for Money 1
Very Poor Value for Money 2
Fairly Poor Value for Money.. 3
Neither Poor nor Good Value for Money.. 4
Fairly Good Value for Money... 5
Very Good Value for Money 6
Extremely Good Value for Money 7
Don't Know/Can't say.. 8

QUALITY LEVELS BOARD

Q3 Water and Sewerage Companies are deciding on a plan for services for the five years from 2005 to 2010. I would like your views on what you would like to see happen.

Thinking first about 'maintaining water pipes, treatment works and reservoirs' in 2010. Bearing in mind the current service level **[POINT TO SERVICE LEVEL ON SHOWCARD B]** how important is it to **maintain this level** rather than have a reduced level? Please respond on a scale of 1 to 5 where 1 means 'not at all important' and 5 means 'extremely important' **[SHOWCARD A3] [RECORD ANSWER IN GRID]**.

Q4 Now thinking about improvements. Again, for 'maintaining water pipes, treatment works and reservoirs' please say how important it would be to you for **improvements** to be introduced by the year 2010? **[REFER TO SHOWCARD B]**. please respond on a scale of 1 to 5 **[SHOWCARD A3]** where 1 means 'not at all important' and 5 means 'extremely important', **[RECORD ANSWER IN GRID]**

[REPEAT FOR ALL REMAINING ROWS AND RECORD ANSWERS IN GRID]

SERVICE ASPECTS	**Importance of**	
	Maintaining current (Q3)	**Achieving Improved (Q4)**
HOW IMPORTANT IS IT TO ..... **Q3....MAINTAIN CURRENT SERVICE LEVELS RATHER THAN REDUCE LEVELS FOR ....** **Q4....IMPROVE CURRENT SERVICE LEVELS FOR.........**		
1…maintaining water pipes, treatment works and reservoirs?		
2…ensuring a reliable and continuous water supply?		
3…drinking Water Quality – Ensuring the safety of tap water?		
4…managing the appearance, taste and smell of tap water?		
5…managing the pressure of water in taps & interruptions to supplies		
6…handling customers' accounts, complaints & customers with special needs?		
7…maintaining sewerage pipes & treatment works, meeting new demands and controlling smells from sewage works?		
8…avoiding the risk of homes and gardens being flooded with sewage?		
9…managing the amount of water taken from the environment to supply customers?		
10…managing the effect of water company activities on the quality of rivers, wetlands and coastal waters?		

RESPONSE TO COMPANY PREFERRED PLAN 1

Q5a Under existing plans, by 2005 the average bill in your area will have increased by £ ____ **[SEE INFORMATION CARD. STATE THAT AVERAGE BILL WILL BE _____ AND REFER TO SHOWCARD B IF NECESSARY]**.

Your Water and Sewerage Company/ies is/are considering a plan that proposes these key changes **[SHOWCARD C1]** to current services between 2005 and 2010. Looking at each of the different elements of the plan and how they would each affect your bill, which ones would you like to see? **[CIRCLE ONE RESPONSE]**

None	1	SKIP TO Q5b
Some of them	2	CIRCLE ALL THAT APPLY THEN CONTINUE
All of them.................	3	SKIP TO Q5b

[CIRCLE ALL THAT RESPONDENT WOULD PREFER TO SEE]

	Q5a
Maintaining water pipes, treatment works and reservoirs	1
Ensuring a reliable and continuous water supply	2
Drinking Water Quality – Ensuring the safety of tap water	3
Managing the appearance, taste and smell of tap water	4
Managing water pressure in your taps & the no. of unplanned interruptions	5
Handling customers' accounts, complaints & customers with special needs	6
Maintaining sewerage pipes & treatment, meeting new demand and controlling smells from sewage works	7
Avoiding the risk of homes and gardens being flooded with sewage	8
Managing the amount of water taken from the environment to supply customers	9
Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	10
Company specific attribute 1	11
Company specific attribute 2	12

Q5b If **ALL** these changes shown here were introduced, they could lead to a further increase on the bill of **£ _____** above the rate of inflation **[POINT TO INCREASE ON BILL]** by the year 2010. How does this plan rate in terms of Value for Money **[REFER AGAIN TO SHOWCARD A2]** where 1 means 'extremely poor value for money' and 7 means 'extremely good value for money'?

Extremely Poor Value for Money 1
Very Poor Value for Money 2
Fairly Poor Value for Money 3
Neither Poor nor Good Value for Money... 4
Fairly Good Value for Money 5
Very Good Value for Money 6
Extremely Good Value for Money 7
Don't Know/Can't say 8

Q5c Looking again at showcard C1, would you be prepared to pay this price increase **[INDICATE INCREASE ON BILL]** for the proposals shown? Please indicate on scale from 1 to 4, if you would be willing to pay for the proposed changes, where 1 is 'definitely not willing to pay' and 4 is 'definitely willing to pay'.**[SHOWCARD A4]**

Definitely not willing to pay .... 1 **CONTINUE**
Probably not willing to pay .... 2 **CONTINUE**
Probably willing to pay .... 3 **SKIP TO Q6a**
Definitely willing to pay .... 4 **SKIP TO Q6a**
Don't Know/Can't say .... 8 **SKIP TO Q6a**

[ONLY ASK Q5d IF ANSWER TO Q5c = 1 OR 2]

Q5d Is this because……? **[READ OUT] [CIRCLE THE ONE THAT BEST MATCHES RESPONDENT'S OPINION]**

The improvements are not good enough 1
The cost is too much for the improvements provided 2
I can't afford it 3
Don't Know/Can't say 8

[REMOVE SHOWCARD C1]

RESPONSE TO PLAN 2

Q6a Now I would like you to think about a different set of changes and costs **[SHOWCARD C2].** As mentioned, under existing plans, by 2005 the average bill in your area will have increased by **£ _____ [SEE INFORMATION CARD. STATE THAT AVERAGE BILL WILL BE £ ______]**.

Looking at each of the different elements of the plan and how they would each affect your bill, which ones would you like to see? **[CIRCLE ONE RESPONSE]**

None	1	SKIP TO Q6b
Some of them	2	CIRCLE ALL THAT APPLY THEN CONTINUE
All of them	3	SKIP TO Q6b

[CIRCLE ALL THAT RESPONDENT WOULD PREFER TO SEE]

	Q6a
Maintaining water pipes, treatment works and reservoirs	1
Ensuring a reliable and continuous water supply	2
Drinking Water Quality – Ensuring the safety of tap water	3
Managing the appearance, taste and smell of tap water	4
Managing water pressure in your taps & the no. of unplanned interruptions	5
Handling customers' accounts, complaints & customers with special needs	6
Maintaining sewerage pipes & treatment, meeting new demand and controlling smells from sewage works	7
Avoiding the risk of homes and gardens being flooded with sewage	8
Managing the amount of water taken from the environment to supply customers	9
Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	10

Q6b If **ALL** these changes were introduced, they could lead to a further increase on the bill of **£ _______** above the rate of inflation **[POINT TO INCREASE ON BILL]** by the year 2010. How does this plan rate in terms of Value for Money **[REFER, IF NEEDED, TO SHOWCARD A2]** on a scale of 1 to 7 where 1 means 'extremely poor value for money' and 7 means 'extremely good value for money'?

Extremely Poor Value for Money 1
Very Poor Value for Money 2
Fairly Poor Value for Money 3
Neither Poor nor Good Value for Money... 4
Fairly Good Value for Money... 5
Very Good Value for Money 6
Extremely Good Value for Money 7
Don't Know/Can't say.. 8

Q6c Looking again at showcard C2, would you be prepared to pay this price increase **[INDICATE INCREASE ON BILL]** for the proposals shown? Please indicate on scale from 1 to 4, if you would be willing to pay for the proposed changes, where 1 is 'definitely not willing to pay' and 4 is 'definitely willing to pay'.**[SHOWCARD A4]**

Definitely not willing to pay .... 1 **CONTINUE**
Probably not willing to pay .... 2 **CONTINUE**
Probably willing to pay .... 3 **SKIP TO Q7a**
Definitely willing to pay .... 4 **SKIP TO Q7a**
Don't Know/Can't say... 8 **SKIP TO Q7a**

[ONLY ASK Q6d IF ANSWER TO Q6c = 1 OR 2]

Q6d Is this because……? **[READ OUT] [CIRCLE THE ONE THAT BEST MATCHES RESPONDENT'S OPINION]**

The improvements are not good enough 1
The cost is too much for the improvements provided 2
I can't afford it 3
Don't Know/Can't say.. 8

[REMOVE SHOWCARD C2]

RESPONSE TO PLAN 3

Q7a Now I would like you to think about a third set of changes and costs **[SHOWCARD C3].** As mentioned, under existing plans, by 2005 the average bill in your area will have increased by £ _____ **[SEE INFORMATION CARD. STATE THAT AVERAGE BILL WILL BE £ ______].**

Looking at each of the different elements of the plan and how they would each affect your bill, which ones would you like to see? **[CIRCLE ONE RESPONSE]**

None	1	SKIP TO Q7b
Some of them	2	CIRCLE ALL THAT APPLY THEN CONTINUE
All of them.................	3	SKIP TO Q7b

[CIRCLE ALL THAT RESPONDENT WOULD PREFER TO SEE]

	Q7a
Maintaining water pipes, treatment works and reservoirs	1
Ensuring a reliable and continuous water supply	2
Drinking Water Quality – Ensuring the safety of tap water	3
Managing the appearance, taste and smell of tap water	4
Managing water pressure in your taps & the no. of unplanned interruptions	5
Handling customers' accounts, complaints & customers with special needs	6
Maintaining sewerage pipes & treatment, meeting new demand and controlling smells from sewage works	7
Avoiding the risk of homes and gardens being flooded with sewage	8
Managing the amount of water taken from the environment to supply customers	9
Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	10

Q7b If **ALL** these changes were introduced they could lead to a further increase on the bill of **£ ______** above the rate of inflation **[POINT TO INCREASE ON BILL]** by the year 2010. How does this plan rate in terms of Value for Money **[REFER, IF NEEDED, TO SHOWCARD A2]** where 1 means 'extremely poor value for money' and 7 means 'extremely good value for money'?

Extremely Poor Value for Money 1
Very Poor Value for Money 2
Fairly Poor Value for Money 3
Neither Poor nor Good Value for Money 4
Fairly Good Value for Money 5
Very Good Value for Money 6
Extremely Good Value for Money 7
Don't Know/Can't say 8

Q7c Looking again at showcard C3, would you be prepared to pay this price increase **[INDICATE INCREASE ON BILL]** for the proposals shown? Please indicate on scale from 1 to 4, if you would be willing to pay for the proposed changes, where 1 is 'definitely not willing to pay' and 4 is 'definitely willing to pay'.**[SHOWCARD A4]**

Definitely not willing to pay .... 1 **CONTINUE**
Probably not willing to pay .... 2 **CONTINUE**
Probably willing to pay .... 3 **SKIP TO Q8**
Definitely willing to pay .... 4 **SKIP TO Q8**
Don't Know/Can't say .... 8 **SKIP TO Q8**

[ONLY ASK Q7d IF ANSWER TO Q7c = 1 OR 2]

Q7d Is this because……? **[READ OUT] [CIRCLE THE ONE THAT BEST MATCHES RESPONDENT'S OPINION]**

The improvements are not good enough 1
The cost is too much for the improvements provided 2
I can't afford it 3
Don't Know/Can't say 8

[REMOVE SHOWCARD C3]

ANY OTHER IMPROVEMENTS?

Q8 Are there any service areas where you would like to see more of an improvement than proposed in any of these Plans, or an area where you would like to see an improvement that has not yet been mentioned? **[CIRCLE ALL THAT APPLY].**

Maintaining water pipes, treatment works and reservoirs	1
Ensuring a reliable and continuous water supply	2
Drinking Water Quality – Ensuring the safety of tap water	3
Managing the appearance, taste and smell of tap water	4
Managing water pressure in your taps and the no. of unplanned interruptions	5
Handling customers' accounts, complaints and customers with special needs	6
Maintaining sewerage pipes & treatment & meeting new demand	7
Avoiding the risk of homes and gardens being flooded with sewage	8
Managing the amount of water taken from the environment to supply customers	9
Managing the effect of water company activities on the quality of rivers, wetlands and coastal waters	10
Other 1 (please specify ____)	11
Other 2 (please specify ____)	12
No, none	**13**

Q9 Bills are likely to change during the period 2005-2010. There are three options for bill changes set out below. Customers would pay the same overall amount whichever option was chosen **[SHOWCARD A5]**. If you had to choose one of the options, which would you prefer? **[CIRCLE ONE OPTION]**

Bills change every year according to how much work water companies have to do. This could mean changes in bills for customers up one year and down the next.	**1**
Bills show one big change in the first year, then stay the same for the following four years.	**2**
Bills change steadily every year throughout the period, so that customers do not see big changes from year to year.	**3**

Q10a Thinking about all the changes you have been shown in the three plans, how concerned would you be if some of these had to be delayed until after 2010 to keep customers' bills down or meet other priorities? Please answer on a scale from 1 to 4, where 1 is 'not at all concerned' and 4 is 'very concerned'.

Not at all concerned .... 1 **SKIP TO Q11**
Not very concerned .... 2 **SKIP TO Q11**
Fairly concerned .... 3 **CONTINUE**
Very concerned .... 4 **CONTINUE**
Don't know/Can't say .... 8 **SKIP TO Q11**

[ONLY ASK Q10b IF ANSWER TO Q10a = 3 OR 4]
Q10b Which elements/service areas would cause you most concern if they were delayed? Please specify **[USE RESPONDENTS' OWN WORDS]**

1. ______________________________
2. ______________________________
3. ______________________________

[LIMIT TO 3 ELEMENTS/SERVICE AREAS]

DEMOGRAPHIC INFORMATION

Finally, some questions to help us analyse the results of this survey. To confirm again, all your answers will be kept strictly confidential and not linked to your name and address.

Q11 Are you currently charged for water via a water meter installed at your home?

Yes 1
No 2
Don't Know/Can't say 8

Q12 **[SHOWCARD D1]** Which age band applies to you?

18-24 1
25-34 2
35-44 3
45-54 4
55-59 5
60-64 6
65+ 7
Refused 9

Q13 **[SHOWCARD D2]** Which of these groups do you consider you belong to? **[CIRCLE ONE]**

WHITE:
British 1
Irish 2
Other white background 3

MIXED:
White and black Caribbean 4
White and black African 5
White and Asian 6
Other mixed background 7

ASIAN OR ASIAN BRITISH
Indian 8
Pakistani 9
Bangladeshi 10
Other Asian background 11

BLACK OR BLACK BRITISH
Caribbean 12
African 13
Other black background 14

CHINESE OR OTHER ETHNIC GROUP
Chinese 15
Other background 16

Refused 99

Q14 What is the total annual income of your household (before tax)?
[SHOWCARD D3]

Less than £10,000 1
£10,000 - £19,999 2
£20,000 - £29,999 3
£30,000 - £39,999 4
£40,000 - £49,999 5
£50,000 - £59,999 6
£60,000 or more 7
Don't Know/Can't say/refused 9

[Q15 AND Q16 INTERVIEWER TO COMPLETE]

Q15 [CODE IN LOCATION OF PROPERTY]

Rural/in a village 1
On the edge of town or in a suburb 2
In a town or city 3

Q16 [CODE IN TYPE OF PROPERTY]

Detached 1
Semi-detached 2
Terraced 3
Bungalow 4
Flat/maisonette 5
Other 6

[NOW RECORD DETAILS BELOW]

For quality control reasons a proportion of respondents are contacted after fieldwork to check that the interview was carried out properly. Therefore can I take down your name, address and telephone number, which will not be linked to your answers?

Respondent's Full Name: ______________________________

Address: ______________________________

______________________________ Postcode: ______________

Telephone Number: ______________________________

<u>THANK YOU FOR YOUR HELP</u>

[COMPLETE MRS DECLARATION]

I declare that this interview has been carried out strictly in accordance with your specification and has been conducted within the MRS Code of Conduct with a person unknown to me.			
Interviewers Name	**Interviewers signature**	**Date**	**Checked by supervisor**

Showcard B

	Service	Levels in your area
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	Approx 20,000 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	Fewer than 200 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% of written complaints answered within 10 days
SEWAGE	**7. Maintain 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	About 250 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**	400 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	64% of rivers are of good, 30% fair and 6% poor quality 98.8% of designated bathing waters meet minimum standards and 78.8% meet higher standards 54% of rivers may be at risk from weed growth that can adversely affect wildlife

Showcard C1

Category		Key Proposals	Cost on your bill by 2010
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs	Maintain Current Service	£5.00
TAP WATER	2. Ensuring a reliable and continuous water supply	Maintain Current Service	£3.00
TAP WATER	3. Drinking Water Quality - Ensuring the safety of tap water	Meet current and future standards at 20 treatment works 1833km of water mains renovated to complete the renovation previously agreed 49,300 water company lead pipes replaced to meet new lead standards	£5.00
TAP WATER	4. Managing the appearance, taste and smell of tap water	50% fewer customer complaints about the appearance, taste and smell of tap water	£2.00
TAP WATER	5. Managing the pressure of water in your taps and the number of unplanned interruptions	Maintain Current Service	£0.00
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain Current Service	£0.00
SEWAGE	7. Maintain sewers and sewage treatment works ensuring the network can meet new demands and controlling smells from sewage works	Maintain Current Service	£6.00
SEWAGE	8. Avoiding the risk of homes and gardens being flooded with sewage	Reduce the number of properties at risk of being flooded from sewers from 250 to 150	£5.00
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	An additional: 550km of rivers improved or protected and can better support fish and other wildlife 90 wetlands and 15 lakes restored and protected to support rare wildlife	£2.00
ENVIRONMENT	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	An additional: 2500km of rivers can better support fish and other wildlife 20 wetlands and 15 lakes are restored and protected to support rare wildlife 45 bathing waters are improved	£18.00

Overall cost on bill by 2010 is £46.00

Overall bill by 2010 is £282.00

Showcard C2

Category		Key Proposals	Cost on your bill by 2010
TAP WATER	1. Maintaining water pipes, treatment works and reservoirs	Maintain Current Service	£0.00
TAP WATER	2. Ensuring a reliable and continuous water supply	Maintain Current Service	£3.00
TAP WATER	3. Drinking Water Quality - Ensuring the safety of tap water	Meet current and future standards at 20 treatment works 1833km of water mains renovated to complete the renovation previously agreed 56,005 of water company lead pipes replaced to meet new lead standards	£5.00
TAP WATER	4. Managing the appearance, taste and smell of tap water	50% fewer customer complaints about the appearance, taste and smell of tap water	£2.00
TAP WATER	5. Managing the pressure of water in your taps and the number of unplanned interruptions	Maintain Current Service	£0.00
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain Current Service	£0.00
SEWAGE	7. Maintain sewers and sewage treatment works ensuring the network can meet new demands and controlling smells from sewage works	Maintain Current Service	£4.00
SEWAGE	8. Avoiding the risk of homes and gardens being flooded with sewage	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity	£5.00
ENVIRONMENT	9. Managing the amount of water taken from the environment to supply customers	A additional: 640km of rivers improved or protected and can better support fish and other wildlife 110 wetlands and 20 lakes restored and protected to support rare wildlife	£2.00
ENVIRONMENT	10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters	An additional: 3750km of rivers can better support fish and other wildlife 30 wetlands and 20 lakes are restored and protected to support rare wildlife 70 bathing waters are improved	£22.00

Overall cost on bill by 2010 is £43.00

Overall bill by 2010 is £279.00

Showcard C3

		Key Proposals	Cost on your bill by 2010
TAP WATER	**1. Maintaining water pipes, treatment works and reservoirs**	Maintain Current Service	**£7.00**
TAP WATER	**2. Ensuring a reliable and continuous water supply**	Developing and managing current and future water resources to meet demand	**£5.00**
TAP WATER	**3. Drinking Water Quality - Ensuring the safety of tap water**	Meet current and future standards at 20 treatment works 1833km of water mains renovated to complete the renovation previously agreed 66,729 of water company lead pipes replaced to meet new lead standards	**£10.00**
TAP WATER	**4. Managing the appearance, taste and smell of tap water**	50% fewer customer complaints about the appearance, taste and smell of tap water	**£2.00**
TAP WATER	**5. Managing the pressure of water in your taps and the number of unplanned interruptions**	Maintain Current Service	**£0.00**
	6. Handling customers' accounts, queries, complaints and customers with special needs	Maintain Current Service	**£0.00**
SEWAGE	**7. Maintain sewers and sewage treatment works ensuring the network can meet new demands and controlling smells from sewage works**	Maintain Current Service	**£8.00**
SEWAGE	**8. Avoiding the risk of homes and gardens being flooded with sewage**	Removal of all properties at risk of internal flooding from sewers at least once in ten years and external flooding of the same severity	**£5.00**
ENVIRONMENT	**9. Managing the amount of water taken from the environment to supply customers**	An additional: 1070km of rivers improved or protected and can better support fish and other wildlife 182 wetlands and 30 lakes restored and protected to support rare wildlife	**£4.00**
ENVIRONMENT	**10. Managing the effect of water company activities on the water quality of rivers, wetlands and coastal waters**	An additional: 5000km of rivers can better support fish and other wildlife 40 wetlands and 30 lakes are restored and protected to support rare wildlife 90 bathing waters are improved	**£43.00**

Overall cost on bill by 2010 is £84.00

Overall bill by 2010 is £320.00

Showcard A1

1	2	3	4	5	6	7
Extremely Dissatisfied	Very Dissatisfied	Fairly Dissatisfied	Neither Satisfied nor Dissatisfied	Fairly Satisfied	Very Satisfied	Extremely Satisfied

Satisfaction

Showcard A2

1	2	3	4	5	6	7
Extremely Poor Value for Money	Very Poor Value for Money	Fairly Poor Value for Money	Neither Poor nor Good Value for Money	Fairly Good Value for Money	Very Good Value for Money	Extremely Good Value for Money

Value For Money

Showcard A3

1	2	3	4	5
Not at all Important	Not Very Important	Fairly Important	Very Important	Extremely Important

Importance

Showcard A4

1	2	3	4
Definitely not willing to pay	Probably not willing to pay	Probably willing to pay	Definitely willing to pay

Willingness to Pay

Showcard A5

OPTION 1 Bills change every year according to how much work water companies have to do. This would mean changes in bills for customers up one year and down the next.

OPTION 2 Bills show one big change in the first year, then stay the same for the following four years.

OPTION 3 Bills change steadily every year throughout the period, so that customers do not see big changes from year to year.

Bill Profile

Showcard D1

18 – 24	1
25 – 34	2
35 – 44	3
45 – 54	4
55 – 64	5
65+	6
Refused	9

Showcard D2

<u>WHITE:</u>

British	1
Irish	2
Other white background	3

<u>MIXED:</u>

White and black Caribbean	4
White and black African	5
White and Asian	6
Other mixed background	7

<u>ASIAN OR ASIAN BRITISH</u>

Indian	8
Pakistani	9
Bangladeshi	10
Other Asian background	11

<u>BLACK OR BLACK BRITISH</u>

Caribbean	12
African	13
Other black background	14

<u>CHINESE OR OTHER ETHNIC GROUP</u>

Chinese	15
Other background	16

Showcard D3

Less than £10,000	1
£10,000 - £19,999	2
£20,000 - £29,999	3
£30,000 - £39,999	4
£40,000 - £49,999	5
£50,000 - £59,999	6
£60,000 or more	7
Don’t know / refused	9

OFWAT PERIODIC REVIEW - CUSTOMER RESEARCH 2003
INTERVIWER BRIEFING

Background to Research

Through its Periodic Review 2004 (PR04), the Office of Water Services (OFWAT) will reset the limit on price levels charged by water only and water and sewerage companies in England and Wales for the period 2005-2010. Through PR04, certain minimum quality standards (encompassing environmental, drinking water and sewerage impacts) must be achieved.

All 'water only' and 'water and sewerage' companies are invited to propose changes in service delivery and associated costs of delivery. Bill levels and service delivery levels vary across different companies due to the individual circumstances relating to the specific area that they cover (e.g. hot-spots of low pressure in the South West region). Requirements amongst customers may also differ.

The survey will examine customers' expectations for service improvements and their willingness to pay.

Contact name and telephone number for further information if requested by the respondent:

Lynne Currie at OFWAT – 0121 625 1302.

MVA with Quality Fieldwork have been commissioned to carry out the customer survey for the 2004 Review. This is an extremely important project. It will involve 6000 interviews nationally (England and Wales) starting from 22nd September.

The questionnaire has been finalised, incorporating the valuable experience gained in the two Pilot Surveys.

The notes that follow refer to Quotas, Interviewing and the Questionnaire.

Quotas

The quotas that you have been given are to ensure that the questionnaires we collect are representative of water company customers in each area.

Census Output Areas (OAs) have been randomly selected throughout England and Wales and you should have been given a list of the relevant addresses within the OA(s) that you are responsible for. All addresses on your list are in scope. Within each OA a quota has been set for gender, SEG and working status. The quotas are independent of each other, i.e. as long as you obtain the correct number of males/females, full-time workers/retired/other and SEG – they can be in any combination.

You also have quotas for non-bill paying respondents, these will be supplied by your supervisor.

Interviews

Please make sure that you carry your identity card with you at all times. You will be supplied with a letter of authorisation. The letter of authorisation will need to be shown to all respondents prior to interviewing to reassure them about the bona fide nature of interviewers and give them contact details in the event of any queries.

A unique serial number will need to be recorded in the top right hand corner of each questionnaire – please speak to your supervisor about this. It is crucial that every questionnaire has a serial number. Please also ensure that you fill in the sampling location at the top of the questionnaire.

A series of showcards are provided to aid you in asking the questions.

Please read out the introduction statement to respondents.

If any respondents question their suitability to complete the questionnaire because they have a water meter in their home, please assure the respondent that the changes will still affect them and so their participation in the survey is still important.

Questionnaire

One generic questionnaire has been developed. The information card supplied has additional information that you will need to either write into the spaces on the questionnaire or remember. These details will be the same for all respondents that you interview.

Screening Questions

The first page of the questionnaire lists a series of questions that you must ask the person first contacted at each address to work out whether there is anyone in the household that fits your quotas. **All participants need to be aged 18 or over.**

Supplier and Service Awareness

You will need to inform participants of their water and sewage supplier(s). This information is supplied on the information card.

Showcard B – Respondents need to take time to familiarise themselves with Showcard B before any questions are asked. Point out that this lists the services that customers pay for in their water and sewerage bills and the levels of service that they currently received in their area and encourage respondents to read it thoroughly (wait before asking any questions). Note that Showcard B is double-sided and you should only show the non-priced side for Q1 and turn over to the priced side (rather than 'overlay price') for Q2

Q1 – Level of satisfaction with current services. Participants are asked to indicate how satisfied they are with the overall level of service in their area. Participants respond on a scale from 1 to 7, circle appropriate number. Use showcard A1 in order to aid response.

Q2 – Value For Money of current services. The average price per annum for customers in their water area should be overlaid showcard B. This is also on the Information card. This price needs to be brought to participant's attention before asking 'value for money'. Participants respond on a scale from 1 to 7, circle appropriate number. Use showcard A2 in order to aid response.

Quality Levels Board

Q3 and Q4 should be completed for the first attribute before moving onto the next (i.e. rather than complete Q3 for all attributes and then ask Q4). It is easier for respondents to complete it this way. Introduce the questions; explain that you will be asking about the importance of maintaining current levels of service and the importance of improving levels of service. If unclear to respondents, quote an example:

> Someone might be happy with the current quality level for a service and would not wish for it to deteriorate so they would assign a high importance rating to maintain (Q3). However, they may not be too bothered about further improvements (preferring improvements in other services) and so may assign a fairly low importance rating in Q4.

Q3 – Importance of maintaining current service levels rather than having a reduced level. Write response (number from 1 to 5) in first column, headed 'Maintaining current Q3'. Use showcard A3 to aid response.

Q4 – Importance of improving current service levels. Write response (number from 1 to 5) in second column, headed 'Achieving Improved Q4'. Use showcard A3 to aid response.

Response to Company Preferred Plan 1

You need to inform respondents of the increase in the average bill in their area by 2005. This is supplied on the Information card. For some areas there is not expected to be an increase. If this is the case in your area, you can leave out all references to an increase by 2005. Just ask the respondent their opinion on the proposed price plans and increases from 2005 to 2010.

Show participants showcard C1, and explain that it details proposed changes to service levels and the costs associated with them. Allow adequate time for them to read it and digest the information before asking any questions.

Q5a – Elements of the proposed plan that participants would like to see introduced. Circle all elements that participants indicate they would like to see. There may be additional company specific attributes for your area (a maximum of two); these are numbered 11 and 12.

Inform participants of the increase on the average bill in their area by 2010 if **all** of the elements were introduced (not just the ones that they have selected). This information is on showcard C1.

Q5b – Value for Money of Plan 1. Participants respond on a scale from 1 to 7, circle appropriate number. Use showcard A2 in order to aid response.

Q5c – Willingness to Pay. Refer back to showcard C1 and ask respondents to consider the proposals shown and if they are willing to pay for them. Participants respond on a scale from 1 to 4, circle appropriate number. Use showcard A4 in order to aid response.

Q5d (& Q6d & Q7d) – Reason why respondents are probably not or definitely not willing to pay. Only ask if participants answered 1 or 2 to Q5c. Read out responses and circle one number.

When showing C1, C2 and C3 each should be presented as a different set of proposals. Some respondents may point out the costs of the same proposal seems different from one plan to another. In this case respond as follows: Each of the sets of proposals I'm showing you are different. Please respond to the proposal and costs mentioned on <u>this</u> showcard only.

For some plans, in some areas, the individual component prices add up to a total price that is <u>more</u> than the stated price at the bottom of the showcard. The reason is that, for the company overall, there is a cost-saving of making all the changes.

Response to Plan 2

Use showcard C2. Questions as for Plan 1. Note, there are no company specific attributes for this section.

Response to Plan 3

Use showcard C3. Questions as for Plans 1 and 2. Note, there are no company specific attributes for this section.

Any other improvements?

Q8 - Areas where participants would like to see more of an improvement. Circle any of the areas where participants have indicated that they would like to see more of an improvement than already suggested in the plans shown. In addition, ask if respondents would like to see improvements in any areas not mentioned in the plans and write details into Other 1 and Other 2. Circle all areas mentioned.

Q9 – Bill Options. Explain that whichever plan or proposals are implemented bills are likely to change during 2005-2010. Give the participant showcard A5, explain that it shows three options for bill changes, and ask them to select the one that they prefer. Circle appropriate number.

Q10a – Level of concern regarding delay of improvement(s). Read out question and responses. Circle appropriate number.

Q10b – Elements where delays are a concern. Only complete this question if participants have answered 3 or 4 to Q10a. Write in response to question verbatim. Limit to 3 elements/service areas.

Demographic Information

Q11 – Q14 are straightforward

Please complete **Q15** and **Q16** yourself after you have thanked the respondent for their time and filled in the MRS declaration.

Please leave respondents with a thank you note.

Appendix B

Results at Company and Regional Level

(With statistical testing of differences)

In the tables that follow, company names are abbreviated as follows:

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

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

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Extremely dissatisfied	0%	0%	2%	0%	3%	1%	2%	2%	2%	0%	3%	1%	1%	2%	1%	0%	2%	1%	0%	1%	1%	0%	1%
Very dissatisfied	4%	1%	3%	4%	3%	2%	3%	3%	6%	4%	4%	6%	2%	2%	3%	0%	2%	4%	1%	4%	3%	2%	3%
Fairly dissatisfied	8%	5%	7%	6%	4%	4%	4%	9%	10%	6%	6%	6%	10%	10%	5%	5%	6%	7%	3%	7%	8%	5%	4%
Neither satisfied nor dissatisfie	10%	9%	7%	7%	10%	7%	11%	15%	14%	11%	12%	9%	8%	8%	9%	14%	11%	12%	9%	11%	5%	4%	6%
Fairly satisfied	38%	51%	42%	39%	36%	37%	30%	33%	38%	37%	26%	34%	46%	39%	47%	38%	39%	34%	49%	37%	35%	33%	26%
Very satisfied	30%	30%	34%	32%	32%	39%	41%	26%	27%	35%	36%	37%	24%	34%	31%	31%	31%	32%	31%	26%	37%	36%	48%
Extremely satisfied	9%	2%	2%	12%	11%	6%	7%	11%	2%	5%	11%	6%	10%	4%	3%	11%	8%	8%	7%	11%	11%	20%	13%
Dont know/cant say	1%	2%	2%	1%	1%	4%	2%	2%	1%	2%	2%	0%	0%	1%	2%	0%	2%	2%	0%	3%	1%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	**263**	**201**	**200**	**202**	203	202	197	218	199	202	201	402	201	203	396	202	200	411	181	192	356	202	203
No. of bill payers/company (1000s)	**4309**	**295**	**1715**	**148**	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		Yorkshire Water	
Extremely dissatisfied	1%	3%	2%	1%	2%	1%	1%	1%	1%	0%
Very dissatisfied	4%	3%	3%	5%	2%	3%	4%	3%	3%	2%
Fairly dissatisfied	8%	4%	5%	7%	10%	5%	7%	5%	8%	5%
Neither satisfied nor dissatisfie	9%	10%	10%	8%	8%	10%	12%	11%	5%	4%
Fairly satisfied	40%	36%	35%	36%	39%	43%	34%	42%	35%	32%
Very satisfied	31%	32%	36%	35%	34%	31%	32%	30%	37%	37%
Extremely satisfied	7%	11%	7%	7%	4%	5%	8%	8%	11%	19%
Dont know/cant say	1%	1%	3%	0%	1%	2%	2%	2%	1%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	866	203	980	603	203	900	411	510	356	405
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

	KEY
54%	Individual results(i.e.the proportion of respondents who were extremely dissatisfied) are statistically significantly different from national results at the 99% level of confidence
54%	Company/regional results are statistically significantly different from National results at the 99% level of confidence
54%	Results are not statisitcally significantly different from the national results at the 99% level of confidence

NATIONAL

Extremely dissatisfied	1%
Very dissatisfied	3%
Fairly dissatisfied	6%
Neither satisfied nor dissatisfie	9%
Fairly satisfied	38%
Very satisfied	33%
Extremely satisfied	8%
Dont know/cant say	1%
TOTAL	100%
Unweighted Base	5437

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

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Extremely poor value	2%	1%	3%	1%	2%	2%	3%	3%	0%	1%	6%	3%	3%	4%	1%	0%	2%	2%	0%	2%	1%	0%	4%
Very poor value	6%	3%	6%	8%	3%	5%	5%	7%	4%	4%	5%	5%	6%	12%	4%	3%	3%	5%	0%	2%	3%	10%	4%
Fairly poor value	11%	13%	14%	14%	9%	13%	11%	10%	15%	10%	14%	12%	14%	26%	8%	7%	12%	10%	11%	11%	10%	15%	9%
Neither poor nor good value	23%	26%	20%	19%	19%	16%	33%	22%	17%	22%	26%	19%	17%	19%	23%	22%	17%	25%	22%	20%	20%	18%	10%
Fairly good value	38%	37%	34%	33%	41%	40%	30%	38%	42%	39%	30%	41%	38%	28%	44%	42%	43%	35%	43%	39%	36%	33%	36%
Very good value	14%	13%	15%	17%	18%	17%	7%	16%	12%	15%	11%	13%	15%	9%	11%	21%	12%	18%	16%	10%	23%	16%	33%
Extremely good value	2%	1%	1%	4%	3%	3%	2%	1%	1%	1%	5%	3%	4%	0%	1%	5%	1%	3%	2%	4%	4%	3%	2%
Dont know/cant say	5%	6%	7%	4%	5%	4%	9%	4%	9%	7%	4%	3%	2%	2%	9%	1%	10%	3%	7%	11%	4%	4%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	263	201	200	202	203	202	197	218	199	202	201	402	201	202	398	202	200	411	181	192	356	202	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water			United Utilities Water PLC		YorkshireWater	
Extremely poor value	2%	2%	3%	3%	4%	1%	2%	1%	1%	0%
Very poor value	6%	3%	5%	6%	12%	4%	5%	2%	3%	10%
Fairly poor value	12%	9%	13%	13%	26%	9%	10%	11%	10%	14%
Neither poor nor good value	22%	19%	19%	19%	19%	22%	25%	23%	20%	18%
Fairly good value	36%	41%	38%	41%	28%	42%	35%	40%	36%	33%
Very good value	14%	18%	14%	13%	9%	12%	18%	12%	23%	17%
Extremely good value	2%	3%	3%	3%	0%	1%	3%	2%	4%	3%
Dont know/cant say	6%	5%	5%	3%	2%	9%	3%	9%	4%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	866	203	980	603	202	902	411	510	356	405
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Extremely poor value	2%
Very poor value	5%
Fairly poor value	11%
Neither poor nor good value	21%
Fairly good value	38%
Very good value	15%
Extremely good value	2%
Dont know/cant say	5%
TOTAL	100%
Unweighted Base	5438

Q3 HOW IMPORTANT IS IT TO MAINTAIN CURRENT LEVEL OF SERVICE RATHER THAN HAVE A REDUCED LEVEL?

COMPANY -proportion of respondents who stated 'important' or 'very important'

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Maintaining water pipes,treatment works,reservoirs	90%	97%	92%	97%	97%	95%	94%	95%	86%	90%	96%	96%	93%	90%	87%	99%	75%	94%	84%	95%	95%	98%	96%
Ensuring a reliable & continuous water supply	93%	98%	95%	97%	100%	97%	92%	98%	91%	93%	97%	98%	92%	92%	91%	98%	86%	95%	84%	97%	96%	99%	97%
Ensuring the safety of tap water	92%	99%	95%	97%	100%	98%	94%	99%	93%	93%	98%	98%	98%	92%	92%	99%	83%	96%	75%	98%	98%	99%	97%
Managing the appearance taste & smell of tap water	87%	97%	94%	97%	98%	93%	92%	98%	91%	90%	92%	94%	97%	85%	88%	99%	75%	94%	71%	91%	95%	98%	94%
Managing the pressure of water in taps & the no. of unplanned interruptions	86%	95%	94%	96%	92%	92%	90%	95%	88%	86%	90%	92%	93%	83%	88%	98%	81%	92%	86%	85%	91%	98%	93%
Handling customers accounts, queries, complaints & customers with special needs	79%	91%	87%	94%	89%	83%	85%	91%	87%	82%	82%	84%	93%	76%	77%	94%	72%	80%	92%	72%	88%	96%	92%
network meets new demands & controlling smells from sewage works	88%	97%	92%	99%	99%	96%	95%	95%	86%	88%	94%	91%	92%	88%	87%	96%	81%	92%	82%	94%	95%	96%	96%
Avoiding the risk of homes and gardens being flooded with sewage	88%	96%	93%	97%	97%	94%	92%	91%	87%	90%	94%	93%	93%	85%	89%	97%	80%	93%	78%	92%	97%	93%	96%
Managing the amount of water taken from the environment to supply customers	88%	93%	87%	95%	95%	93%	90%	91%	78%	84%	89%	88%	91%	80%	83%	95%	75%	86%	75%	94%	94%	94%	92%
on the water quality of rivers, wetlands & coastal waters	83%	93%	87%	97%	95%	96%	90%	91%	74%	88%	90%	89%	92%	83%	83%	94%	75%	89%	73%	95%	89%	95%	93%
Unweighted Base	254	200	200	202	203	202	196	218	199	202	200	401	198	203	391	201	192	409	181	192	355	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL -proportion of respondents who stated 'important' or 'very important'

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	North West Water	Thames Water	United Utilities Water PLC		YorkshireWater	
Maintaining water pipes,treatment works,reservoirs	91%	97%	93%	96%	90%	86%	94%	90%	95%	98%
Ensuring a reliable & continuous water supply	94%	100%	96%	97%	92%	91%	95%	90%	96%	98%
Ensuring the safety of tap water	93%	100%	97%	98%	92%	91%	96%	87%	98%	99%
Managing the appearance taste & smell of tap water	90%	98%	92%	94%	85%	86%	94%	82%	95%	98%
Managing the pressure of water in taps & the no. of unplanned interruptions	88%	92%	90%	92%	83%	87%	92%	86%	91%	98%
Handling customers accounts, queries, complaints & customers with special needs	82%	89%	83%	85%	76%	77%	80%	83%	88%	95%
network meets new demands & controlling smells from sewage works	90%	99%	92%	92%	88%	87%	92%	88%	95%	96%
Avoiding the risk of homes and gardens being flooded with sewage	90%	97%	92%	93%	85%	88%	93%	86%	97%	93%
Managing the amount of water taken from the environment to supply customers	88%	95%	89%	88%	80%	83%	86%	85%	94%	94%
on the water quality of rivers, wetlands & coastal waters	85%	95%	90%	89%	83%	83%	89%	84%	89%	95%
Unweighted Base	855	203	979	599	203	886	409	509	355	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL -proportion of respondents who stated 'important' or 'very important'

Maintaining water pipes,treatment works,reservoirs	92%
Ensuring a reliable & continuous water supply	95%
Ensuring the safety of tap water	95%
Managing the appearance taste & smell of tap water	91%
Managing the pressure of water in taps & the no. of unplanned interruptions	90%
Handling customers accounts, queries, complaints & customers with special needs	83%
network meets new demands & controlling smells from sewage works	91%
Avoiding the risk of homes and gardens being flooded with sewage	91%
Managing the amount of water taken from the environment to supply customers	87%
on the water quality of rivers, wetlands & coastal waters	87%
Unweighted Base	5403

Q4 HOW IMPORTANT WOULD IT BE FOR IMPROVEMENTS TO BE INTRODUCED BY THE YEAT 2010?

COMPANY -proportion of respondents who stated 'important' or 'very important'

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Maintaining water pipes,treatment works,reservoirs	64%	73%	88%	88%	76%	64%	71%	79%	84%	73%	80%	85%	74%	62%	58%	87%	41%	81%	69%	75%	68%	75%	82%
Ensuring a reliable & continuous water supply	64%	75%	88%	88%	76%	64%	71%	80%	84%	76%	77%	86%	73%	62%	58%	88%	33%	86%	64%	77%	69%	77%	84%
Ensuring the safety of tap water	69%	76%	91%	90%	77%	67%	78%	83%	85%	81%	86%	89%	83%	67%	64%	91%	46%	87%	73%	79%	77%	82%	85%
Managing the appearance taste & smell of tap water	76%	87%	94%	89%	86%	76%	77%	86%	87%	80%	87%	89%	91%	77%	69%	94%	64%	87%	72%	82%	81%	83%	84%
Managing the pressure of water in taps & the no. of unplanned interruptions	60%	74%	87%	87%	71%	58%	66%	82%	82%	72%	71%	82%	77%	61%	57%	87%	40%	83%	63%	70%	66%	73%	80%
Handling customers accounts, queries, complaints & customers with special needs	55%	69%	84%	85%	68%	49%	58%	74%	80%	59%	63%	68%	72%	59%	52%	87%	33%	72%	57%	64%	65%	67%	79%
network meets new demands & controlling smells from sewage works	77%	79%	93%	91%	79%	65%	79%	81%	84%	72%	82%	85%	77%	73%	62%	90%	34%	84%	78%	80%	72%	76%	85%
Avoiding the risk of homes and gardens being flooded with sewage	74%	79%	94%	89%	77%	67%	74%	81%	87%	72%	86%	84%	71%	64%	60%	90%	35%	84%	75%	81%	70%	75%	83%
Managing the amount of water taken from the environment to supply customers	62%	76%	84%	88%	76%	67%	70%	80%	82%	68%	78%	83%	69%	62%	62%	91%	37%	79%	69%	85%	69%	74%	83%
on the water quality of rivers, wetlands & coastal waters	66%	75%	84%	88%	76%	69%	69%	78%	78%	67%	80%	83%	72%	66%	61%	86%	41%	80%	75%	83%	68%	77%	84%
Unweighted Base	246	200	200	202	203	202	194	216	199	202	199	385	193	203	391	191	191	406	181	192	355	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL -proportion of respondents who stated 'important' or 'very important'

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water		Thames Water	United Utilities Water PLC		YorkshireWater	
Maintaining water pipes,treatment works,reservoirs	71%	76%	71%	83%	62%	57%	81%	72%	68%	76%
Ensuring a reliable & continuous water supply	72%	76%	70%	84%	62%	55%	86%	70%	69%	77%
Ensuring the safety of tap water	76%	77%	75%	89%	67%	63%	87%	76%	77%	82%
Managing the appearance taste & smell of tap water	82%	86%	80%	90%	77%	70%	87%	77%	81%	84%
Managing the pressure of water in taps & the no. of unplanned interruptions	69%	71%	66%	81%	61%	55%	83%	66%	66%	73%
Handling customers accounts, queries, complaints & customers with special needs	64%	68%	58%	68%	59%	50%	72%	60%	65%	68%
network meets new demands & controlling smells from sewage works	81%	79%	71%	84%	73%	58%	84%	79%	72%	77%
Avoiding the risk of homes and gardens being flooded with sewage	80%	77%	73%	83%	64%	58%	84%	77%	70%	76%
Managing the amount of water taken from the environment to supply customers	69%	76%	70%	81%	62%	59%	79%	76%	69%	75%
on the water quality of rivers, wetlands & coastal waters	72%	76%	70%	81%	66%	59%	80%	78%	68%	77%
Unweighted Base	847	203	975	579	203	875	406	507	355	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL-proportion of respondents who stated 'important' or 'very important'

Maintaining water pipes,treatment works,reservoirs	71%
Ensuring a reliable & continuous water supply	72%
Ensuring the safety of tap water	76%
Managing the appearance taste & smell of tap water	81%
Managing the pressure of water in taps & the no. of unplanned interruptions	69%
Handling customers accounts, queries, complaints & customers with special needs	62%
network meets new demands & controlling smells from sewage works	74%
Avoiding the risk of homes and gardens being flooded with sewage	73%
Managing the amount of water taken from the environment to supply customers	71%
on the water quality of rivers, wetlands & coastal waters	72%
Unweighted Base	5355

Q5 **WHICH ELEMENTS OF PLAN 1 WOULD YOU LIKE TO SEE?**

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
None	20%	14%	16%	23%	17%	12%	16%	7%	13%	13%	20%	15%	13%	19%	17%	16%	26%	21%	7%	10%	14%	25%	9%
Some of them	50%	28%	41%	23%	34%	45%	44%	19%	52%	51%	34%	42%	30%	43%	32%	24%	34%	34%	36%	40%	39%	31%	25%
All of them	31%	58%	42%	53%	49%	43%	40%	74%	35%	36%	46%	43%	57%	38%	52%	61%	40%	45%	57%	51%	47%	44%	65%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	262	201	200	202	203	202	197	218	199	202	201	401	201	203	398	202	200	411	181	192	357	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		YorkshireWater	
None	19%	17%	13%	15%	19%	19%	21%	10%	14%	24%
Some of them	46%	34%	46%	40%	43%	31%	34%	38%	39%	30%
All of them	35%	49%	41%	45%	38%	50%	45%	52%	47%	45%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	865	203	980	602	203	902	411	510	357	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

None	17%
Some of them	37%
All of them	45%
TOTAL	100%
Unweighted Base	5439

Q5a WHICH ELEMENTS OF PLAN 1 WOULD YOU LIKE TO SEE?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Maintaining water pipes,treatment works,reservoirs	50%	72%	58%	61%	63%	61%	60%	90%	69%	62%	59%	59%	70%	59%	65%	73%	47%	56%	76%	62%	63%	52%	77%
Ensuring a reliable & continuous water supply	54%	76%	61%	66%	67%	66%	61%	83%	68%	67%	62%	64%	78%	59%	64%	73%	55%	63%	77%	67%	64%	54%	77%
Ensuring the safety of tap water	62%	77%	71%	73%	77%	80%	73%	91%	78%	71%	65%	74%	72%	63%	74%	79%	62%	69%	86%	73%	69%	62%	80%
Managing the appearance taste & smell of tap water	55%	79%	62%	66%	72%	64%	66%	88%	68%	66%	65%	68%	71%	58%	65%	72%	60%	61%	76%	69%	63%	57%	75%
Managing the pressure of water in taps & the no. of unplanned interruptions	49%	70%	53%	61%	61%	56%	55%	85%	64%	52%	54%	64%	65%	50%	59%	69%	54%	58%	69%	60%	59%	52%	74%
Handling customers accounts, queries, complaints & customers with special needs	41%	72%	52%	58%	59%	51%	53%	85%	54%	46%	52%	59%	62%	45%	57%	66%	50%	51%	64%	53%	55%	46%	71%
network meets new demands & controlling smells from sewage works	52%	68%	57%	61%	66%	60%	62%	88%	69%	56%	62%	64%	73%	57%	65%	72%	56%	56%	78%	60%	66%	53%	76%
Avoiding the risk of homes and gardens being flooded with sewage	45%	73%	63%	61%	62%	58%	65%	85%	64%	60%	67%	61%	66%	53%	61%	71%	50%	55%	75%	60%	64%	52%	78%
Managing the amount of water taken from the environment to supply customers	46%	70%	50%	61%	59%	52%	53%	83%	53%	53%	58%	55%	64%	46%	61%	66%	50%	51%	72%	63%	59%	50%	75%
on the water quality of rivers, wetlands & coastal waters	45%	68%	54%	59%	59%	51%	55%	79%	51%	51%	57%	53%	62%	51%	60%	66%	51%	50%	68%	69%	60%	51%	74%
Unweighted Base	263	201	200	202	203	202	197	218	198	202	201	402	201	203	398	202	200	411	181	192	357	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		YorkshireWater	
Maintaining water pipes,treatment works,reservoirs	53%	63%	64%	61%	59%	61%	56%	68%	63%	54%
Ensuring a reliable & continuous water supply	57%	67%	67%	66%	59%	62%	63%	70%	64%	56%
Ensuring the safety of tap water	65%	77%	75%	73%	63%	71%	69%	78%	69%	63%
Managing the appearance taste & smell of tap water	58%	72%	65%	69%	58%	65%	61%	71%	63%	59%
Managing the pressure of water in taps & the no. of unplanned interruptions	51%	61%	55%	65%	50%	59%	58%	63%	59%	54%
Handling customers accounts, queries, complaints & customers with special needs	46%	59%	51%	59%	45%	56%	51%	58%	55%	49%
network meets new demands & controlling smells from sewage works	54%	66%	61%	65%	57%	63%	56%	69%	66%	55%
Avoiding the risk of homes and gardens being flooded with sewage	51%	62%	62%	62%	53%	59%	55%	67%	64%	54%
Managing the amount of water taken from the environment to supply customers	48%	59%	53%	56%	46%	58%	51%	65%	59%	52%
on the water quality of rivers, wetlands & coastal waters	49%	59%	52%	54%	51%	59%	50%	66%	60%	53%
Unweighted Base	866	203	979	603	203	902	411	510	357	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Maintaining water pipes,treatment works,reservoirs	60%
Ensuring a reliable & continuous water supply	63%
Ensuring the safety of tap water	71%
Managing the appearance taste & smell of tap water	64%
Managing the pressure of water in taps & the no. of unplanned interruptions	58%
Handling customers accounts, queries, complaints & customers with special needs	54%
network meets new demands & controlling smells from sewage works	61%
Avoiding the risk of homes and gardens being flooded with sewage	59%
Managing the amount of water taken from the environment to supply customers	55%
on the water quality of rivers, wetlands & coastal waters	55%
Unweighted Base	5440

Q5b HOW DOES PLAN 1 RATE IN TERMS OF VALUE FOR MONEY?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Extremely poor value	11%	7%	4%	5%	5%	5%	7%	6%	5%	3%	10%	5%	4%	9%	3%	3%	5%	9%	2%	2%	5%	4%	4%
Very poor value	14%	11%	11%	6%	7%	13%	14%	11%	11%	4%	9%	8%	8%	14%	5%	4%	8%	13%	4%	6%	6%	13%	6%
Fairly poor value	20%	20%	15%	14%	9%	20%	16%	25%	21%	18%	16%	12%	8%	27%	14%	9%	19%	16%	14%	10%	13%	14%	11%
Neither poor nor good value	20%	31%	22%	20%	22%	21%	25%	27%	14%	19%	15%	17%	17%	18%	26%	20%	23%	21%	23%	18%	18%	19%	12%
Fairly good value	26%	21%	37%	36%	40%	26%	32%	22%	32%	41%	32%	39%	44%	26%	36%	43%	27%	21%	45%	42%	34%	34%	39%
Very good value	6%	4%	7%	11%	10%	5%	3%	3%	11%	9%	10%	13%	13%	3%	5%	14%	7%	10%	8%	14%	20%	11%	21%
Extremely good value	2%	1%	1%	3%	1%	3%	0%	2%	1%	1%	4%	1%	6%	0%	1%	3%	0%	3%	2%	3%	2%	1%	4%
Dont know/cant say	1%	4%	3%	5%	6%	7%	2%	5%	5%	5%	4%	3%	0%	3%	10%	4%	11%	5%	2%	6%	2%	3%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	263	201	200	202	202	202	197	218	199	201	201	401	200	203	398	200	200	411	181	192	355	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water	SOUTH WEST WATER	Thames Water	United Utilities Water PLC		YorkshireWater	
Extremely poor value	9%	5%	6%	5%	9%	4%	9%	3%	5%	4%
Very poor value	13%	7%	11%	8%	14%	6%	13%	6%	6%	13%
Fairly poor value	19%	9%	20%	12%	27%	15%	16%	12%	13%	13%
Neither poor nor good value	21%	22%	20%	17%	18%	24%	21%	21%	18%	19%
Fairly good value	29%	40%	30%	40%	26%	34%	21%	42%	34%	34%
Very good value	6%	10%	6%	13%	3%	7%	10%	10%	20%	12%
Extremely good value	2%	1%	2%	2%	0%	1%	3%	2%	2%	1%
Dont know/cant say	2%	6%	5%	3%	3%	9%	5%	3%	2%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	866	202	979	601	203	900	411	510	355	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Extremely poor value	6%
Very poor value	9%
Fairly poor value	15%
Neither poor nor good value	21%
Fairly good value	33%
Very good value	10%
Extremely good value	2%
Dont know/cant say	5%
TOTAL	100%
Unweighted Base	5433

Q5c WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN PLAN 1?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Definitely not willing to pay	24%	12%	15%	17%	11%	16%	12%	9%	12%	10%	18%	17%	8%	15%	9%	8%	9%	17%	5%	8%	10%	17%	12%
Probably not willing to pay	21%	24%	23%	19%	11%	28%	24%	25%	26%	20%	19%	17%	15%	38%	17%	14%	17%	20%	23%	16%	17%	19%	14%
Probably willing to pay	47%	53%	46%	47%	52%	40%	51%	48%	43%	53%	35%	44%	57%	40%	54%	55%	48%	40%	56%	45%	43%	45%	46%
Definitely willing to pay	5%	8%	7%	12%	11%	10%	8%	7%	10%	9%	27%	18%	19%	6%	14%	18%	12%	10%	15%	25%	25%	13%	23%
Dont know/Cant say	4%	4%	9%	6%	15%	6%	4%	10%	9%	8%	1%	4%	1%	1%	7%	6%	13%	12%	2%	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%	100%	100%
Unweighted Base	263	201	200	202	203	202	197	218	199	201	201	402	201	203	397	201	200	411	181	192	356	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		YorkshireWater	
Definitely not willing to pay	21%	11%	15%	16%	15%	9%	17%	7%	10%	17%
Probably not willing to pay	21%	11%	26%	17%	38%	17%	20%	20%	17%	19%
Probably willing to pay	47%	52%	41%	46%	40%	52%	40%	51%	43%	45%
Definitely willing to pay	5%	11%	12%	18%	6%	14%	10%	18%	25%	14%
Dont know/Cant say	5%	15%	6%	3%	1%	8%	12%	4%	4%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	866	203	979	603	203	900	411	510	356	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Definitely not willing to pay	14%
Probably not willing to pay	19%
Probably willing to pay	46%
Definitely willing to pay	14%
Dont know/Cant say	7%
TOTAL	100%
Unweighted Base	5437

Q5d WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN PLAN 1? (ONLY FOR RESPONDENTS WHO SAID 'DEFINITELY' OR 'PROBABLY NOT' WILLING TO PAY)

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Improvements not good enou	6%	0%	3%	0%	11%	2%	4%	5%	8%	4%	9%	8%	12%	2%	4%	17%	20%	8%	5%	7%	2%	7%	5%
Cost too much for improveme	47%	78%	58%	66%	45%	62%	65%	51%	61%	53%	65%	55%	41%	65%	47%	51%	56%	50%	51%	39%	52%	51%	49%
Cant afford it	39%	18%	36%	34%	36%	31%	29%	34%	28%	40%	22%	30%	48%	30%	40%	30%	19%	38%	34%	44%	41%	42%	40%
Too much & cant afford it	0%	1%	0%	0%	0%	0%	0%	9%	0%	0%	0%	2%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	0%
Dont know/Cant say	8%	2%	4%	0%	8%	6%	2%	1%	3%	3%	4%	5%	0%	4%	6%	2%	5%	3%	10%	10%	5%	0%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	110	73	78	73	45	89	69	67	83	64	80	133	44	110	101	45	46	161	50	42	103	80	57
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water			United Utilities Water PLC		YorkshireWater	
Improvements not good enou	5%	11%	5%	8%	2%	9%	8%	6%	2%	7%
Cost too much for improveme	51%	45%	60%	53%	65%	51%	50%	47%	52%	51%
Cant afford it	37%	36%	31%	32%	30%	33%	38%	38%	41%	42%
Too much & cant afford it	0%	0%	0%	1%	0%	2%	1%	0%	0%	0%
Dont know/Cant say	7%	8%	4%	5%	4%	6%	3%	9%	5%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	334	45	371	177	110	222	161	143	103	137
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Improvements not good enou	6%
Cost too much for improveme	53%
Cant afford it	35%
Too much & cant afford it	1%
Dont know/Cant say	5%
TOTAL	100%
Unweighted Base	1803

Q6 WHICH ELEMENTS OF PLAN 2 WOULD YOU LIKE TO SEE?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
None	22%	14%	16%	16%	16%	16%	19%	7%	11%	16%	21%	17%	12%	20%	18%	21%	26%	19%	6%	10%	13%	25%	8%
Some of them	46%	24%	43%	25%	35%	51%	42%	22%	54%	57%	33%	40%	26%	46%	32%	26%	34%	33%	40%	38%	39%	35%	20%
All of them	32%	62%	41%	59%	49%	33%	39%	71%	35%	27%	46%	43%	62%	35%	50%	53%	40%	48%	53%	53%	48%	40%	71%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	263	201	200	202	203	202	197	218	199	202	201	402	201	203	398	202	200	411	181	192	356	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		YorkshireWater	
None	20%	16%	16%	16%	20%	20%	19%	10%	13%	24%
Some of them	44%	35%	51%	38%	46%	32%	33%	39%	39%	34%
All of them	36%	49%	33%	46%	35%	48%	48%	51%	48%	42%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	866	203	980	603	203	902	411	510	356	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

None	18%
Some of them	38%
All of them	44%
TOTAL	100%
Unweighted Base	5440

Q6a WHICH ELEMENTS OF PLAN 2 WOULD YOU LIKE TO SEE?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Maintaining water pipes,treatment works,reservoirs	51%	74%	57%	66%	62%	55%	56%	88%	68%	54%	63%	59%	74%	58%	63%	67%	53%	58%	81%	63%	61%	49%	83%
Ensuring a reliable & continuous water supply	56%	78%	61%	70%	69%	60%	58%	80%	66%	58%	64%	66%	82%	58%	62%	64%	54%	65%	82%	67%	62%	54%	81%
Ensuring the safety of tap water	63%	79%	69%	77%	76%	74%	70%	90%	77%	69%	66%	73%	75%	64%	72%	72%	62%	71%	86%	73%	71%	61%	83%
Managing the appearance taste & smell of tap water	57%	82%	60%	70%	72%	57%	61%	88%	62%	61%	62%	67%	74%	55%	63%	66%	62%	66%	75%	69%	63%	54%	78%
Managing the pressure of water in taps & the no. of unplanned interruptions	52%	75%	53%	65%	60%	46%	52%	84%	61%	47%	55%	62%	70%	48%	56%	61%	55%	59%	68%	60%	57%	49%	78%
Handling customers accounts, queries, complaints & customers with special needs	47%	75%	50%	63%	58%	45%	45%	83%	51%	37%	51%	56%	67%	46%	55%	56%	48%	54%	65%	55%	54%	45%	76%
network meets new demands & controlling smells from sewage works	53%	70%	57%	71%	65%	54%	62%	86%	65%	49%	63%	59%	74%	55%	60%	64%	54%	57%	75%	62%	64%	52%	80%
Avoiding the risk of homes and gardens being flooded with sewage	50%	76%	65%	66%	60%	50%	61%	85%	61%	54%	64%	57%	67%	51%	57%	65%	50%	58%	71%	60%	61%	49%	80%
Managing the amount of water taken from the environment to supply customers	45%	72%	51%	64%	59%	46%	52%	84%	51%	51%	57%	50%	66%	44%	57%	58%	51%	54%	68%	65%	58%	48%	79%
Managing the effect of water company activities on the water quality of rivers, wetlands & coastal waters	44%	69%	50%	66%	57%	40%	48%	78%	44%	45%	55%	51%	64%	45%	57%	59%	48%	52%	60%	70%	59%	46%	79%
Unweighted Base	263	201	200	202	203	202	197	217	197	202	201	402	199	203	398	201	199	411	181	192	357	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water	SOUTH WEST WATER	Thames Water	United Utilities Water PLC		YorkshireWater	
Maintaining water pipes,treatment works,reservoirs	54%	62%	58%	61%	58%	61%	58%	70%	61%	52%
Ensuring a reliable & continuous water supply	59%	69%	61%	68%	58%	61%	65%	72%	62%	56%
Ensuring the safety of tap water	66%	76%	72%	73%	64%	70%	71%	78%	71%	63%
Managing the appearance taste & smell of tap water	59%	72%	59%	68%	55%	64%	66%	70%	63%	56%
Managing the pressure of water in taps & the no. of unplanned interruptions	54%	60%	49%	63%	48%	57%	59%	63%	57%	51%
Handling customers accounts, queries, complaints & customers with special needs	49%	58%	44%	58%	46%	54%	54%	58%	54%	48%
network meets new demands & controlling smells from sewage works	55%	65%	57%	61%	55%	59%	57%	68%	64%	54%
Avoiding the risk of homes and gardens being flooded with sewage	56%	60%	55%	58%	51%	56%	58%	65%	61%	52%
Managing the amount of water taken from the environment to supply customers	48%	59%	49%	52%	44%	56%	54%	64%	58%	50%
on the water quality of rivers, wetlands & coastal waters	47%	57%	43%	53%	45%	55%	52%	62%	59%	49%
Unweighted Base	866	203	977	601	203	900	411	510	357	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Maintaining water pipes,treatment works,reservoirs	59%
Ensuring a reliable & continuous water supply	63%
Ensuring the safety of tap water	70%
Managing the appearance taste & smell of tap water	64%
Managing the pressure of water in taps & the no. of unplanned interruptions	57%
Handling customers accounts, queries, complaints & customers with special needs	53%
network meets new demands & controlling smells from sewage works	59%
Avoiding the risk of homes and gardens being flooded with sewage	57%
Managing the amount of water taken from the environment to supply customers	54%
on the water quality of rivers, wetlands & coastal waters	53%
Unweighted Base	5434

Q6b HOW DOES PLAN 2 RATE IN TERMS OF VALUE FOR MONEY?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Extremely poor value	10%	7%	5%	5%	5%	9%	13%	9%	5%	4%	10%	7%	4%	10%	4%	3%	3%	7%	1%	2%	5%	7%	5%
Very poor value	13%	10%	11%	8%	6%	19%	14%	14%	10%	6%	11%	8%	7%	16%	6%	4%	4%	15%	5%	7%	4%	15%	5%
Fairly poor value	17%	16%	14%	13%	8%	22%	20%	23%	22%	17%	15%	15%	11%	27%	13%	18%	13%	14%	15%	10%	13%	12%	9%
Neither poor nor good value	17%	27%	27%	19%	19%	19%	21%	29%	20%	21%	10%	15%	18%	20%	24%	17%	24%	23%	23%	14%	14%	19%	9%
Fairly good value	29%	24%	33%	38%	41%	18%	28%	18%	26%	42%	28%	39%	36%	22%	39%	39%	34%	26%	42%	39%	43%	34%	37%
Very good value	8%	11%	6%	11%	12%	3%	3%	2%	12%	6%	19%	11%	20%	1%	5%	10%	11%	9%	6%	17%	16%	11%	28%
Extremely good value	3%	1%	2%	2%	2%	1%	0%	1%	1%	1%	2%	2%	4%	0%	1%	3%	1%	3%	3%	5%	3%	1%	5%
Dont know/cant say	2%	4%	3%	4%	7%	8%	1%	3%	4%	4%	3%	3%	0%	3%	9%	5%	10%	3%	3%	5%	2%	1%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	262	200	200	202	203	202	197	217	199	201	201	402	200	203	398	202	200	410	180	192	356	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water	SOUTH WEST WATER	Thames Water	United Utilities Water PLC		YorkshireWater	
Extremely poor value	8%	5%	9%	7%	10%	4%	7%	3%	5%	7%
Very poor value	13%	6%	16%	8%	16%	5%	15%	7%	4%	14%
Fairly poor value	16%	8%	21%	14%	27%	13%	14%	14%	13%	12%
Neither poor nor good value	20%	19%	18%	15%	20%	23%	23%	20%	14%	18%
Fairly good value	30%	41%	24%	39%	22%	38%	26%	38%	43%	34%
Very good value	7%	12%	6%	12%	1%	8%	9%	10%	16%	12%
Extremely good value	3%	2%	1%	2%	0%	1%	3%	3%	3%	1%
Dont know/cant say	3%	7%	6%	3%	3%	9%	3%	4%	2%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	864	203	978	602	203	902	410	509	356	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Extremely poor value	6%
Very poor value	10%
Fairly poor value	15%
Neither poor nor good value	19%
Fairly good value	34%
Very good value	10%
Extremely good value	2%
Dont know/cant say	4%
TOTAL	100%
Unweighted Base	5433

Q6c WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN PLAN 2?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Definitely not willing to pay	20%	11%	17%	15%	12%	21%	14%	9%	9%	13%	18%	15%	9%	13%	9%	13%	8%	16%	6%	6%	12%	18%	10%
Probably not willing to pay	22%	18%	19%	18%	11%	34%	30%	26%	29%	22%	19%	19%	15%	45%	17%	17%	14%	21%	22%	13%	17%	21%	10%
Probably willing to pay	46%	53%	49%	52%	47%	31%	48%	45%	43%	52%	33%	45%	58%	38%	52%	51%	57%	40%	54%	52%	48%	45%	48%
Definitely willing to pay	8%	14%	7%	10%	13%	7%	5%	7%	10%	7%	28%	18%	16%	3%	16%	13%	10%	12%	16%	23%	20%	14%	29%
Dont know/Cant say	4%	5%	8%	6%	16%	7%	4%	12%	9%	6%	3%	4%	1%	1%	6%	7%	11%	11%	2%	6%	3%	2%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	263	200	200	202	203	201	197	217	199	202	201	402	201	203	397	202	200	411	180	192	356	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		YorkshireWater	
Definitely not willing to pay	19%	12%	18%	14%	13%	9%	16%	7%	12%	17%
Probably not willing to pay	21%	11%	31%	19%	45%	16%	21%	20%	17%	20%
Probably willing to pay	47%	47%	36%	47%	38%	52%	40%	52%	48%	45%
Definitely willing to pay	8%	13%	8%	17%	3%	16%	12%	17%	20%	15%
Dont know/Cant say	5%	16%	7%	4%	1%	7%	11%	4%	3%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	865	203	978	603	203	901	411	509	356	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Definitely not willing to pay	14%
Probably not willing to pay	20%
Probably willing to pay	46%
Definitely willing to pay	14%
Dont know/Cant say	6%
TOTAL	100%
Unweighted Base	5435

Q6d WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN PLAN 2? (ONLY FOR RESPONDENTS WHO SAID 'DEFINITELY' OR 'PROBABLY NOT' WILLING TO PAY)

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Improvements not good enou	7%	5%	6%	2%	11%	1%	4%	8%	9%	4%	17%	9%	19%	1%	6%	20%	35%	12%	8%	6%	3%	7%	3%
Cost too much for improveme	46%	71%	59%	59%	41%	70%	62%	46%	64%	67%	57%	56%	41%	58%	49%	48%	37%	39%	51%	43%	52%	51%	47%
Cant afford it	42%	23%	31%	36%	42%	28%	31%	31%	22%	27%	26%	30%	40%	38%	40%	32%	24%	44%	39%	46%	40%	41%	44%
Too much & cant afford it	0%	0%	0%	0%	0%	0%	0%	10%	0%	0%	0%	1%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	0%
Dont know/Cant say	5%	1%	4%	3%	6%	2%	3%	6%	5%	2%	1%	4%	0%	4%	3%	0%	4%	4%	1%	4%	5%	1%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	109	59	73	64	46	110	88	70	84	75	81	131	44	120	99	60	40	155	51	34	105	86	45
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water			United Utilities Water PLC		YorkshireWater	
Improvements not good enou	7%	11%	5%	10%	1%	14%	12%	7%	3%	6%
Cost too much for improveme	51%	41%	65%	54%	58%	47%	39%	49%	52%	51%
Cant afford it	38%	42%	27%	32%	38%	35%	44%	41%	40%	41%
Too much & cant afford it	0%	0%	0%	1%	0%	1%	1%	0%	0%	0%
Dont know/Cant say	4%	6%	2%	3%	4%	3%	4%	2%	5%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	305	46	427	175	120	217	155	148	105	131
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Improvements not good enou	8%
Cost too much for improveme	51%
Cant afford it	37%
Too much & cant afford it	0%
Dont know/Cant say	3%
TOTAL	100%
Unweighted Base	1829

Q7 WHICH ELEMENTS OF PLAN 3 WOULD YOU LIKE TO SEE?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
None	24%	18%	15%	26%	16%	24%	22%	8%	12%	17%	22%	16%	15%	20%	18%	28%	23%	24%	9%	11%	18%	31%	9%
Some of them	44%	24%	40%	24%	38%	52%	40%	33%	55%	61%	35%	41%	26%	50%	34%	22%	35%	32%	38%	36%	43%	36%	21%
All of them	32%	58%	44%	50%	46%	25%	39%	59%	34%	23%	42%	42%	59%	29%	48%	50%	42%	45%	54%	53%	39%	33%	70%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	262	201	200	202	203	202	197	218	199	202	201	402	201	203	398	202	200	411	180	192	357	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water			United Utilities Water PLC		YorkshireWater	
None	21%	16%	20%	16%	20%	20%	24%	12%	18%	30%
Some of them	42%	38%	53%	39%	50%	33%	32%	37%	43%	34%
All of them	37%	46%	27%	45%	29%	47%	45%	51%	39%	36%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	865	203	980	603	203	902	411	509	357	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

None	20%
Some of them	38%
All of them	42%
TOTAL	100%
Unweighted Base	5439

Q7a WHICH ELEMENTS OF PLAN 3 WOULD YOU LIKE TO SEE?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT
Maintaining water pipes,treatment works,reservoirs	50%	72%	58%	59%	62%	44%	58%	89%	66%	51%	61%	61%
Ensuring a reliable & continuous water supply	55%	75%	65%	62%	68%	49%	55%	85%	63%	58%	65%	67%
Ensuring the safety of tap water	60%	75%	71%	69%	75%	68%	69%	90%	73%	67%	63%	72%
Managing the appearance taste & smell of tap water	58%	77%	63%	63%	70%	51%	62%	88%	65%	59%	61%	68%
Managing the pressure of water in taps & the no. of unplanned interruptions	51%	71%	54%	59%	57%	39%	51%	85%	57%	42%	53%	62%
Handling customers accounts, queries, complaints & customers with special needs	45%	70%	52%	56%	56%	36%	46%	85%	51%	31%	49%	57%
network meets new demands & controlling smells from sewage works	53%	67%	56%	59%	62%	47%	59%	85%	68%	50%	62%	60%
Avoiding the risk of homes and gardens being flooded with sewage	48%	69%	63%	57%	61%	44%	59%	85%	62%	51%	63%	57%
Managing the amount of water taken from the environment to supply customers	44%	68%	52%	59%	56%	35%	49%	83%	49%	38%	57%	50%
on the water quality of rivers, wetlands & coastal waters	44%	65%	52%	58%	53%	31%	46%	64%	40%	39%	52%	50%
Unweighted Base	263	201	200	202	203	202	197	217	197	202	201	402
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426

	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Maintaining water pipes,treatment works,reservoirs	73%	57%	62%	60%	55%	57%	82%	62%	58%	44%	81%
Ensuring a reliable & continuous water supply	80%	57%	61%	60%	58%	65%	81%	68%	58%	49%	79%
Ensuring the safety of tap water	72%	64%	72%	67%	64%	68%	86%	73%	68%	54%	84%
Managing the appearance taste & smell of tap water	73%	54%	64%	62%	60%	63%	76%	68%	60%	48%	79%
Managing the pressure of water in taps & the no. of unplanned interruptions	70%	49%	56%	57%	57%	56%	69%	59%	54%	43%	78%
Handling customers accounts, queries, complaints & customers with special needs	65%	44%	54%	54%	53%	52%	65%	55%	50%	39%	76%
network meets new demands & controlling smells from sewage works	74%	52%	60%	61%	58%	53%	77%	63%	58%	45%	79%
Avoiding the risk of homes and gardens being flooded with sewage	67%	52%	57%	57%	53%	55%	68%	60%	59%	43%	80%
Managing the amount of water taken from the environment to supply customers	66%	45%	56%	54%	55%	51%	68%	64%	54%	43%	79%
on the water quality of rivers, wetlands & coastal waters	61%	37%	56%	56%	54%	48%	59%	69%	45%	41%	77%
Unweighted Base	200	203	398	201	199	409	180	192	357	202	203
No. of bill payers/company (1000s)	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water			United Utilities Water PLC		YorkshireWater	
Maintaining water pipes,treatment works,reservoirs	53%	62%	52%	63%	57%	60%	57%	70%	58%	47%
Ensuring a reliable & continuous water supply	58%	68%	56%	69%	57%	61%	65%	72%	58%	51%
Ensuring the safety of tap water	64%	75%	68%	72%	64%	70%	68%	78%	68%	57%
Managing the appearance taste & smell of tap water	60%	70%	56%	69%	54%	63%	63%	70%	60%	51%
Managing the pressure of water in taps & the no. of unplanned interruptions	53%	57%	44%	63%	49%	57%	56%	62%	54%	46%
Handling customers accounts, queries, complaints & customers with special needs	48%	56%	39%	58%	44%	54%	52%	58%	50%	42%
network meets new demands & controlling smells from sewage works	54%	62%	53%	62%	52%	60%	53%	69%	58%	47%
Avoiding the risk of homes and gardens being flooded with sewage	54%	61%	52%	59%	52%	56%	55%	63%	59%	46%
Managing the amount of water taken from the environment to supply customers	48%	56%	41%	52%	45%	56%	51%	64%	54%	46%
on the water quality of rivers, wetlands & coastal waters	47%	53%	35%	51%	37%	56%	48%	61%	45%	44%
Unweighted Base	866	203	977	602	203	900	409	509	357	405
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Maintaining water pipes,treatment works,reservoirs	58%
Ensuring a reliable & continuous water supply	62%
Ensuring the safety of tap water	69%
Managing the appearance taste & smell of tap water	63%
Managing the pressure of water in taps & the no. of unplanned interruptions	55%
Handling customers accounts, queries, complaints & customers with special needs	52%
network meets new demands & controlling smells from sewage works	58%
Avoiding the risk of homes and gardens being flooded with sewage	56%
Managing the amount of water taken from the environment to supply customers	52%
on the water quality of rivers, wetlands & coastal waters	49%
Unweighted Base	5431

Q7b HOW DOES PLAN 3 RATE IN TERMS OF VALUE FOR MONEY?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Extremely poor value	17%	9%	9%	13%	6%	21%	20%	20%	15%	12%	19%	9%	4%	14%	4%	6%	5%	16%	5%	2%	14%	6%	4%
Very poor value	17%	14%	16%	9%	6%	24%	12%	16%	15%	11%	12%	10%	7%	20%	7%	11%	5%	14%	13%	6%	13%	21%	8%
Fairly poor value	20%	18%	15%	17%	15%	19%	20%	23%	26%	22%	9%	13%	14%	26%	18%	18%	11%	17%	26%	14%	20%	15%	11%
Neither poor nor good value	14%	31%	26%	17%	23%	17%	22%	28%	14%	26%	13%	16%	23%	18%	26%	17%	28%	19%	23%	16%	17%	23%	10%
Fairly good value	22%	16%	26%	29%	31%	9%	23%	7%	20%	19%	27%	37%	33%	18%	31%	34%	28%	22%	22%	39%	20%	25%	42%
Very good value	6%	7%	4%	7%	8%	2%	3%	2%	7%	4%	13%	10%	14%	1%	5%	6%	13%	6%	5%	14%	12%	6%	19%
Extremely good value	3%	1%	1%	3%	1%	1%	0%	0%	1%	0%	4%	2%	5%	0%	1%	3%	1%	1%	2%	4%	1%	1%	4%
Dont know/cant say	1%	4%	3%	5%	9%	7%	1%	4%	3%	4%	2%	3%	0%	4%	9%	6%	9%	4%	4%	6%	2%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	262	200	199	202	202	202	197	218	199	201	201	401	200	202	396	201	200	411	180	192	354	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		Yorkshire Water	
Extremely poor value	14%	6%	20%	8%	14%	5%	16%	6%	14%	6%
Very poor value	16%	6%	20%	9%	20%	6%	14%	10%	13%	20%
Fairly poor value	19%	15%	20%	13%	26%	16%	17%	19%	20%	14%
Neither poor nor good value	18%	23%	18%	17%	18%	25%	19%	20%	17%	22%
Fairly good value	23%	31%	13%	37%	18%	31%	22%	29%	20%	27%
Very good value	5%	8%	3%	10%	1%	8%	6%	9%	12%	7%
Extremely good value	2%	1%	1%	2%	0%	2%	1%	2%	1%	1%
Dont know/cant say	2%	9%	5%	3%	4%	8%	4%	5%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	863	202	979	601	202	899	411	509	354	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Extremely poor value	11%
Very poor value	12%
Fairly poor value	17%
Neither poor nor good value	20%
Fairly good value	27%
Very good value	8%
Extremely good value	2%
Dont know/cant say	5%
TOTAL	100%
Unweighted Base	5426

Q7c **WOULD YOU BE PREPARED TO PAY FOR THE PROPOSED CHANGES IN PLAN 3?**

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Definitely not willing to pay	25%	14%	22%	21%	14%	39%	26%	18%	28%	26%	26%	18%	12%	20%	9%	20%	11%	25%	20%	8%	25%	21%	12%
Probably not willing to pay	25%	21%	18%	19%	15%	26%	25%	27%	22%	29%	18%	18%	18%	43%	19%	20%	9%	23%	29%	12%	28%	27%	16%
Probably willing to pay	40%	53%	47%	44%	45%	22%	40%	36%	33%	35%	33%	40%	56%	32%	53%	44%	56%	31%	38%	48%	32%	36%	45%
Definitely willing to pay	7%	7%	3%	9%	9%	5%	6%	6%	7%	4%	20%	19%	12%	4%	12%	10%	13%	11%	10%	25%	12%	13%	24%
Dont know/Cant say	3%	5%	9%	6%	18%	8%	4%	13%	10%	6%	3%	4%	2%	1%	7%	6%	10%	10%	4%	6%	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%	100%	100%
Unweighted Base	263	200	200	202	202	202	197	218	199	202	201	402	201	203	396	202	199	411	180	192	357	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water	NORTH WEST WATER		United Utilities Water PLC		YorkshireWater	
Definitely not willing to pay	24%	14%	36%	17%	20%	10%	25%	16%	25%	20%
Probably not willing to pay	23%	15%	26%	18%	43%	16%	23%	21%	28%	26%
Probably willing to pay	43%	45%	27%	43%	32%	53%	31%	42%	32%	37%
Definitely willing to pay	6%	9%	5%	18%	4%	14%	11%	16%	12%	14%
Dont know/Cant say	5%	18%	7%	4%	1%	7%	10%	5%	2%	3%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	865	202	980	603	203	899	411	509	357	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Definitely not willing to pay	19%
Probably not willing to pay	22%
Probably willing to pay	41%
Definitely willing to pay	12%
Dont know/Cant say	6%
TOTAL	100%
Unweighted Base	5435

Q7d **WHY ARE YOU NOT WILLING TO PAY FOR THE PROPOSED CHANGES IN PLAN 3? (ONLY FOR RESPONDENTS WHO SAID 'DEFINITELY' OR 'PROBABLY NOT' WILLING TO PAY)**

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Improvements not good enou	7%	0%	2%	4%	5%	1%	5%	6%	8%	4%	19%	7%	14%	1%	5%	12%	26%	7%	6%	6%	2%	11%	4%
Cost too much for improveme	50%	74%	58%	65%	42%	65%	65%	59%	71%	70%	55%	57%	49%	58%	47%	59%	50%	45%	61%	40%	59%	50%	53%
Cant afford it	38%	25%	37%	30%	46%	33%	29%	23%	20%	25%	26%	31%	37%	38%	43%	28%	22%	44%	30%	50%	36%	35%	36%
Too much & cant afford it	0%	0%	0%	0%	0%	0%	0%	8%	0%	0%	0%	2%	0%	0%	2%	0%	0%	1%	0%	0%	0%	0%	0%
Dont know/Cant say	6%	1%	2%	0%	6%	2%	2%	5%	2%	1%	1%	3%	0%	3%	3%	0%	2%	3%	2%	3%	2%	3%	7%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	122	69	83	83	55	131	109	92	106	108	95	143	56	131	107	77	37	202	88	36	188	102	55
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water	South West Water	Thames Water	United Utilities Water PLC		YorkshireWater	
Improvements not good enou	5%	5%	4%	8%	1%	11%	7%	6%	2%	10%
Cost too much for improveme	53%	42%	65%	56%	58%	49%	45%	53%	59%	51%
Cant afford it	37%	46%	29%	32%	38%	36%	44%	38%	36%	35%
Too much & cant afford it	0%	0%	0%	1%	0%	1%	1%	0%	0%	0%
Dont know/Cant say	4%	6%	2%	2%	3%	2%	3%	3%	2%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	357	55	553	199	131	244	202	189	188	157
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Improvements not good enou	6%
Cost too much for improveme	54%
Cant afford it	36%
Too much & cant afford it	1%
Dont know/Cant say	3%
TOTAL	100%
Unweighted Base	2275

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

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Maintaining water pipes,treatment works,reservoirs	6%	2%	4%	2%	4%	4%	1%	2%	11%	2%	8%	4%	8%	2%	7%	2%	7%	6%	6%	4%	4%	6%	2%
Ensuring a reliable & continuous water supply	3%	3%	9%	1%	2%	2%	0%	2%	7%	1%	9%	4%	4%	0%	3%	5%	1%	10%	5%	6%	6%	5%	2%
Ensuring the safety of tap water	8%	6%	23%	7%	11%	3%	2%	6%	10%	7%	13%	12%	16%	7%	10%	12%	9%	25%	12%	14%	13%	17%	5%
Managing the appearance taste & smell of tap water	11%	8%	21%	7%	13%	5%	3%	4%	9%	2%	15%	10%	12%	7%	9%	10%	12%	22%	8%	17%	10%	8%	8%
Managing the pressure of water in taps & the no. of unplanned interruptions	5%	3%	2%	3%	2%	4%	2%	2%	11%	2%	4%	7%	10%	2%	6%	4%	7%	9%	4%	7%	5%	7%	6%
Handling customers accounts, queries, complaints & customers with special needs	6%	2%	5%	3%	3%	3%	1%	0%	3%	0%	6%	3%	2%	3%	5%	1%	1%	8%	2%	2%	7%	3%	2%
Maintaining sewers and sewage works, ensuring network meets new demands &	10%	6%	9%	9%	5%	4%	2%	4%	10%	7%	6%	7%	5%	4%	7%	4%	2%	9%	8%	5%	7%	7%	9%
Avoiding the risk of homes and gardens being flooded with sewage	8%	7%	12%	3%	2%	4%	2%	6%	18%	2%	8%	4%	4%	1%	6%	7%	4%	6%	3%	6%	5%	9%	6%
Managing the amount of water taken from the environment to supply customers	3%	6%	5%	0%	1%	4%	1%	3%	7%	7%	3%	4%	2%	3%	5%	3%	3%	5%	0%	7%	3%	4%	1%
Managing the effect of water company activities on the water quality of rivers,	5%	8%	7%	2%	5%	7%	2%	2%	5%	7%	6%	6%	3%	3%	4%	3%	4%	8%	1%	19%	3%	9%	3%
Upgrade water pipes	1%	2%	2%	3%	1%	1%	0%	3%	5%	0%	3%	3%	2%	2%	3%	1%	1%	2%	2%	1%	1%	0%	2%
(further) reduce limescale in water	4%	0%	3%	2%	0%	0%	2%	1%	1%	1%	8%	0%	0%	0%	3%	1%	4%	0%	0%	0%	1%	0%	0%
(further) reduce sewerage drainage problems	1%	1%	4%	4%	0%	0%	0%	0%	0%	5%	0%	3%	1%	0%	1%	1%	0%	1%	0%	0%	0%	0%	2%
Introduce option of having a water meter	1%	5%	0%	0%	1%	1%	0%	0%	1%	2%	1%	1%	0%	1%	1%	2%	0%	0%	0%	0%	1%	0%	1%
(further) reduce sewerage treatment works smells	6%	0%	1%	5%	0%	0%	0%	0%	0%	1%	0%	1%	1%	0%	0%	1%	0%	0%	1%	1%	0%	0%	1%
Reduce chemical treatments in water supply	0%	2%	0%	0%	1%	2%	2%	1%	0%	1%	1%	1%	0%	0%	0%	0%	3%	2%	0%	1%	0%	2%	1%
No, none	61%	66%	48%	64%	68%	74%	78%	80%	58%	66%	52%	67%	66%	71%	58%	70%	64%	51%	73%	48%	62%	69%	63%
Unweighted Base	263	201	200	202	203	202	197	218	199	202	201	402	201	203	398	202	200	411	181	192	356	202	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater		Southern Water	Severn Trent Water			United Utilities Water PLC		YorkshireWater	
Maintaining water pipes,treatment works,reservoirs	5%	4%	6%	5%	2%	6%	6%	5%	4%	5%
Ensuring a reliable & continuous water supply	4%	2%	5%	4%	0%	3%	10%	5%	6%	5%
Ensuring the safety of tap water	12%	11%	7%	13%	7%	10%	25%	11%	13%	16%
Managing the appearance taste & smell of tap water	13%	13%	7%	10%	7%	10%	22%	11%	10%	8%
Managing the pressure of water in taps & the no. of unplanned interruptions	4%	2%	4%	7%	2%	6%	9%	5%	5%	7%
Handling customers accounts, queries, complaints & customers with special needs	6%	3%	4%	3%	3%	4%	8%	1%	7%	3%
Maintaining sewers and sewage works, ensuring network meets new demands &	10%	5%	6%	6%	4%	5%	9%	6%	7%	8%
Avoiding the risk of homes and gardens being flooded with sewage	9%	2%	8%	4%	1%	5%	6%	4%	5%	9%
Managing the amount of water taken from the environment to supply customers	4%	1%	5%	4%	3%	5%	5%	3%	3%	4%
Managing the effect of water company activities on the water quality of rivers,	5%	5%	7%	6%	3%	4%	8%	9%	3%	8%
Upgrade water pipes	1%	1%	1%	3%	2%	2%	2%	1%	1%	0%
(further) reduce limescale in water	4%	0%	1%	0%	0%	4%	0%	0%	1%	0%
(further) reduce sewerage drainage problems	2%	0%	1%	2%	0%	1%	1%	0%	0%	0%
Introduce option of having a water meter	1%	1%	1%	1%	1%	1%	0%	0%	1%	0%
(further) reduce sewerage treatment works smells	5%	0%	0%	1%	0%	0%	0%	1%	0%	0%
Reduce chemical treatments in water supply	0%	1%	1%	0%	0%	1%	2%	1%	0%	2%
No, none	58%	68%	68%	67%	71%	60%	51%	63%	62%	68%
Unweighted Base	866	203	980	603	203	902	411	510	356	405
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Maintaining water pipes,treatment works,reservoirs	5%
Ensuring a reliable & continuous water supply	5%
Ensuring the safety of tap water	13%
Managing the appearance taste & smell of tap water	12%
Managing the pressure of water in taps & the no. of unplanned interruptions	6%
Handling customers accounts, queries, complaints & customers with special needs	4%
Maintaining sewers and sewage works, ensuring network meets new demands &	7%
Avoiding the risk of homes and gardens being flooded with sewage	6%
Managing the amount of water taken from the environment to supply customers	4%
Managing the effect of water company activities on the water quality of rivers,	6%
Upgrade water pipes	2%
(further) reduce limescale in water	1%
(further) reduce sewerage drainage problems	1%
Introduce option of having a water meter	1%
(further) reduce sewerage treatment works smells	1%
Reduce chemical treatments in water supply	1%
No, none	62%
Unweighted Base	5439

Q9 WHICH BILL OPTION WOULD YOU PREFER?

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Bills change every year accord	12%	11%	8%	21%	12%	12%	9%	10%	9%	6%	15%	10%	11%	15%	14%	8%	13%	12%	16%	12%	10%	15%	9%
Bills show one big change in f	14%	7%	17%	11%	10%	5%	5%	7%	8%	8%	8%	8%	18%	5%	10%	5%	20%	9%	7%	9%	9%	7%	9%
Bills change steadily every ye	74%	82%	74%	68%	79%	83%	86%	84%	84%	86%	77%	82%	71%	80%	76%	88%	67%	79%	77%	79%	81%	79%	82%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	250	199	199	201	201	200	194	212	198	199	200	397	201	201	388	197	191	407	178	192	353	199	200
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water			United Utilities Water PLC		YorkshireWater	
Bills change every year accord	11%	12%	11%	10%	15%	13%	12%	14%	10%	14%
Bills show one big change in f	14%	10%	6%	10%	5%	12%	9%	8%	9%	7%
Bills change steadily every ye	74%	79%	83%	80%	80%	75%	79%	79%	81%	79%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	849	201	968	598	201	877	407	504	353	399
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Bills change every year accord	12%
Bills show one big change in f	10%
Bills change steadily every ye	78%
TOTAL	100%
Unweighted Base	5357

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

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Not at all concerned	22%	18%	20%	15%	18%	17%	21%	20%	20%	8%	25%	14%	13%	14%	15%	15%	17%	25%	12%	16%	18%	31%	13%
Not very concerned	27%	19%	36%	26%	24%	22%	30%	35%	28%	23%	18%	37%	35%	39%	43%	25%	36%	27%	30%	40%	28%	22%	28%
Fairly concerned	19%	40%	27%	32%	28%	32%	33%	20%	33%	45%	24%	25%	23%	29%	28%	35%	25%	20%	29%	26%	27%	22%	28%
Very concerned	24%	17%	11%	16%	15%	24%	9%	9%	9%	17%	27%	14%	15%	14%	9%	19%	7%	12%	25%	13%	15%	13%	26%
Dont know/cant say	8%	5%	6%	11%	16%	6%	8%	16%	11%	7%	6%	11%	13%	4%	5%	6%	16%	16%	4%	5%	12%	12%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	263	201	200	202	203	201	196	218	198	202	201	402	200	203	396	202	200	411	180	192	357	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	Northumbrian Water	Southern Water	Severn Trent Water		Thames Water	United Utilities Water PLC		YorkshireWater	
Not at all concerned	21%	18%	17%	14%	14%	16%	25%	15%	18%	30%
Not very concerned	29%	24%	23%	36%	39%	39%	27%	34%	28%	22%
Fairly concerned	23%	28%	32%	25%	29%	28%	20%	28%	27%	22%
Very concerned	20%	15%	21%	14%	14%	10%	12%	18%	15%	14%
Dont know/cant say	7%	16%	7%	11%	4%	8%	16%	5%	12%	12%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unweighted Base	866	203	978	602	203	900	411	508	357	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Not at all concerned	18%
Not very concerned	32%
Fairly concerned	26%
Very concerned	15%
Dont know/cant say	10%
TOTAL	100%
Unweighted Base	5434

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

COMPANY

	ANH	CAM	ESK	THD	NNE	SRN	BWH	FLK	MKT	PRT	SEW	SVT	SST	SWT	TMS	SES	TVW	NWT	WSX	BRL	YKS	WSH	DVW
Maintaining water pipes,treatment works,reservoirs	4%	15%	2%	3%	7%	9%	3%	3%	6%	6%	10%	3%	5%	12%	4%	8%	5%	3%	2%	3%	5%	2%	8%
Ensuring a reliable & continuous water supply	4%	7%	6%	7%	7%	7%	6%	4%	8%	10%	9%	5%	8%	12%	5%	9%	4%	4%	10%	7%	6%	6%	9%
Ensuring the safety of tap water	16%	28%	15%	16%	22%	31%	14%	9%	15%	27%	20%	19%	21%	24%	14%	23%	9%	15%	14%	20%	20%	15%	25%
Managing the appearance taste & smell of tap water	4%	5%	3%	3%	3%	7%	2%	3%	6%	10%	4%	9%	9%	9%	3%	6%	6%	5%	1%	4%	5%	5%	5%
Managing the pressure of water in taps & the no. of unplanned interruptions	1%	0%	0%	2%	1%	2%	1%	0%	3%	2%	3%	2%	4%	1%	1%	1%	2%	0%	1%	3%	1%	0%	1%
Handling customers accounts, queries, complaints & customers with special needs	1%	1%	0%	1%	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	1%	0%	0%	1%	0%
network meets new demands & controlling smells from sewage works	9%	21%	10%	9%	7%	16%	7%	9%	6%	9%	9%	8%	5%	14%	6%	9%	4%	6%	5%	9%	7%	7%	18%
Avoiding the risk of homes and gardens being flooded with sewage	5%	10%	6%	2%	2%	4%	4%	3%	14%	3%	5%	2%	3%	1%	3%	4%	3%	1%	5%	4%	4%	3%	8%
Managing the amount of water taken from the environment to supply customers	2%	3%	2%	0%	0%	4%	2%	2%	2%	6%	5%	3%	2%	0%	2%	2%	1%	2%	1%	4%	1%	1%	3%
the water quality of rivers, wetlands & coastal waters	8%	11%	1%	3%	2%	7%	0%	6%	6%	10%	7%	3%	2%	2%	3%	5%	1%	3%	3%	10%	8%	6%	9%
Unweighted Base	263	201	200	202	203	202	197	218	199	202	201	402	201	203	398	202	200	411	181	192	357	203	203
No. of bill payers/company (1000s)	4309	295	1715	148	2542	2227	433	164	575	659	1433	7426	1232	1557	7941	646	2955	6887	1201	1082	4730	2864	257

REGIONAL

	anglianwater	NORTHUMBRIAN WATER	Southern Water	Severn Trent Water	SOUTH WEST WATER	Thames Water	United Utilities Water PLC		YorkshireWater	
Maintaining water pipes,treatment works,reservoirs	4%	7%	8%	4%	12%	5%	3%	3%	5%	3%
Ensuring a reliable & continuous water supply	5%	7%	8%	6%	12%	5%	4%	8%	6%	6%
Ensuring the safety of tap water	17%	22%	26%	19%	24%	14%	15%	17%	20%	16%
Managing the appearance taste & smell of tap water	4%	3%	7%	9%	9%	4%	5%	2%	5%	5%
Managing the pressure of water in taps & the no. of unplanned interruptions	1%	1%	2%	2%	1%	2%	0%	1%	1%	0%
Handling customers accounts, queries, complaints & customers with special needs	1%	1%	0%	0%	0%	0%	1%	1%	0%	1%
network meets new demands & controlling smells from sewage works	10%	7%	13%	8%	14%	5%	6%	7%	7%	8%
Avoiding the risk of homes and gardens being flooded with sewage	5%	2%	5%	2%	1%	3%	1%	5%	4%	3%
Managing the amount of water taken from the environment to supply customers	2%	0%	4%	3%	0%	2%	2%	3%	1%	1%
the water quality of rivers, wetlands & coastal waters	6%	2%	7%	3%	2%	3%	3%	5%	8%	6%
Unweighted Base	866	203	980	603	203	902	411	510	357	406
National Proportion	12%	5%	8%	16%	3%	23%	13%	5%	9%	6%

NATIONAL

Maintaining water pipes,treatment works,reservoirs	5%
Ensuring a reliable & continuous water supply	6%
Ensuring the safety of tap water	18%
Managing the appearance taste & smell of tap water	5%
Managing the pressure of water in taps & the no. of unplanned interruptions	1%
Handling customers accounts, queries, complaints & customers with special needs	0%
network meets new demands & controlling smells from sewage works	8%
Avoiding the risk of homes and gardens being flooded with sewage	3%
Managing the amount of water taken from the environment to supply customers	2%
the water quality of rivers, wetlands & coastal waters	4%
Unweighted Base	5441

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