



BLUE MARBLE

Acceptability and Affordability Testing

Quantitative Research Report
25th September 2023



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Customer Context

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South West Water (SWW)

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Bristol Water (BRL)

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Bournemouth Water (BW)

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Summary

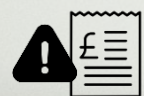
6

Methodology and Appendix

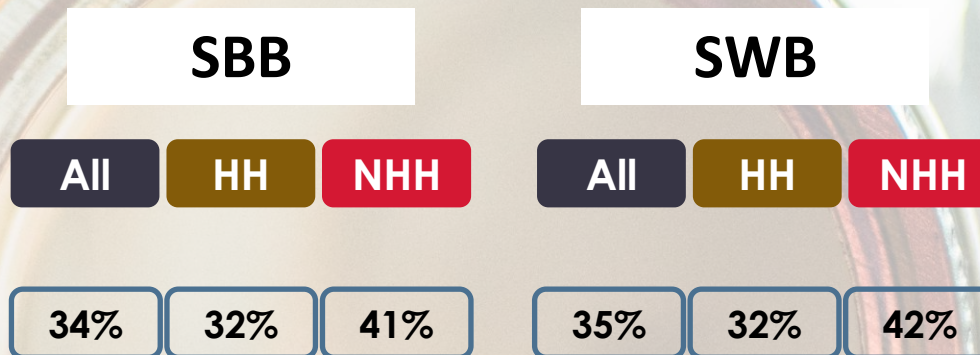


An open metal tin, likely a piggy bank, is shown lying on its side. The tin is made of a dark, possibly copper or brass, metal. It is tilted, and a large number of coins are spilling out from the opening. The coins are a mix of colors, including copper and silver, and are scattered on a dark, textured surface. The background is a soft, out-of-focus light brown or tan color. A semi-transparent blue horizontal band is overlaid across the middle of the image, containing the text "Overall summary" in white, bold, sans-serif font.

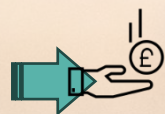
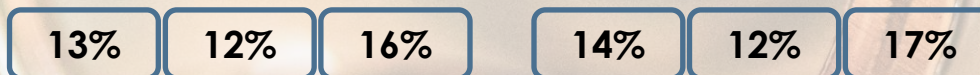
Overall summary



Struggled to pay bills in the last year (all/most/some of the time)



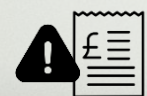
Finding it quite or very difficult to manage financially



Expect financial situation to get worse



Q1. Thinking about your household's /organisation's finances over the last year, how often, if at all, have you struggled to pay at least one of your household/ it's bills?; Q2. Overall, how well would you say you are managing financially now? Q3. Thinking about your household's/organisation's financial situation over the next few years up to 2030, do you expect it to get: **Base** Household and Non household bill payers: Total SBB (2381) SWB (1665) ; **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**



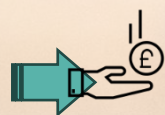
Struggled to pay bills in the last year (all/most/some of the time)

SWW			BRL			BW		
All	HH	NHH	All	HH	NHH	All	HH	NHH
36%	34%	43%	33%	31%	37%	31%	26%	41%



Finding it quite or very difficult to manage financially

14%	13%	17%	12%	12%	13%	11%	9%	14%
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Expect financial situation to get worse

38%	44%	25%	36%	40%	24%	35%	41%	22%
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Q1. Thinking about your household's /organisation's finances over the last year, how often, if at all, have you struggled to pay at least one of your household/ it's bills?; Q2. Overall, how well would you say you are managing financially now? Q3. Thinking about your household's/organisation's financial situation over the next few years up to 2030, do you expect it to get: **Base** Household and Non household bill payers: Total South West Water (983) Bristol Water (716) Bournemouth Water (682) ; **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

	SBB			SWB		
	All	HH	NHH	All	HH	NHH
Overall plan - affordability	21%	16%	34%	22%	15%	35%
Overall plan - acceptable	63%	59%	72%	61%	57%	71%
Water supply only plan - acceptable	67%	66%	71%	64%	64%	69%
Sewerage only plan - acceptable	58%	56%	63%	57%	55%	61%

	SWW			BRL			BW		
	All	HH	NHH	All	HH	NHH	All	HH	NHH
Overall plan - affordability	21%	15%	33%	20%	16%	30%	26%	17%	44%
Overall plan - acceptable	59%	55%	69%	66%	62%	76%	71%	67%	80%
Water supply only plan - acceptable	62%	59%	68%	74%	73%	76%	74%	75%	72%
Sewerage only plan - acceptable	55%	54%	58%	59%	56%	70%	66%	63%	72%

	SBB			SWB		
	All	HH	NHH	All	HH	NHH
Overall plan - affordability	22%	17%	35%	22%	16%	36%
Overall plan - acceptable	72%	70%	77%	69%	67%	75%
Water supply only plan - acceptable	75%	75%	75%	71%	71%	72%
Sewerage only plan - acceptable	65%	63%	70%	65%	64%	67%

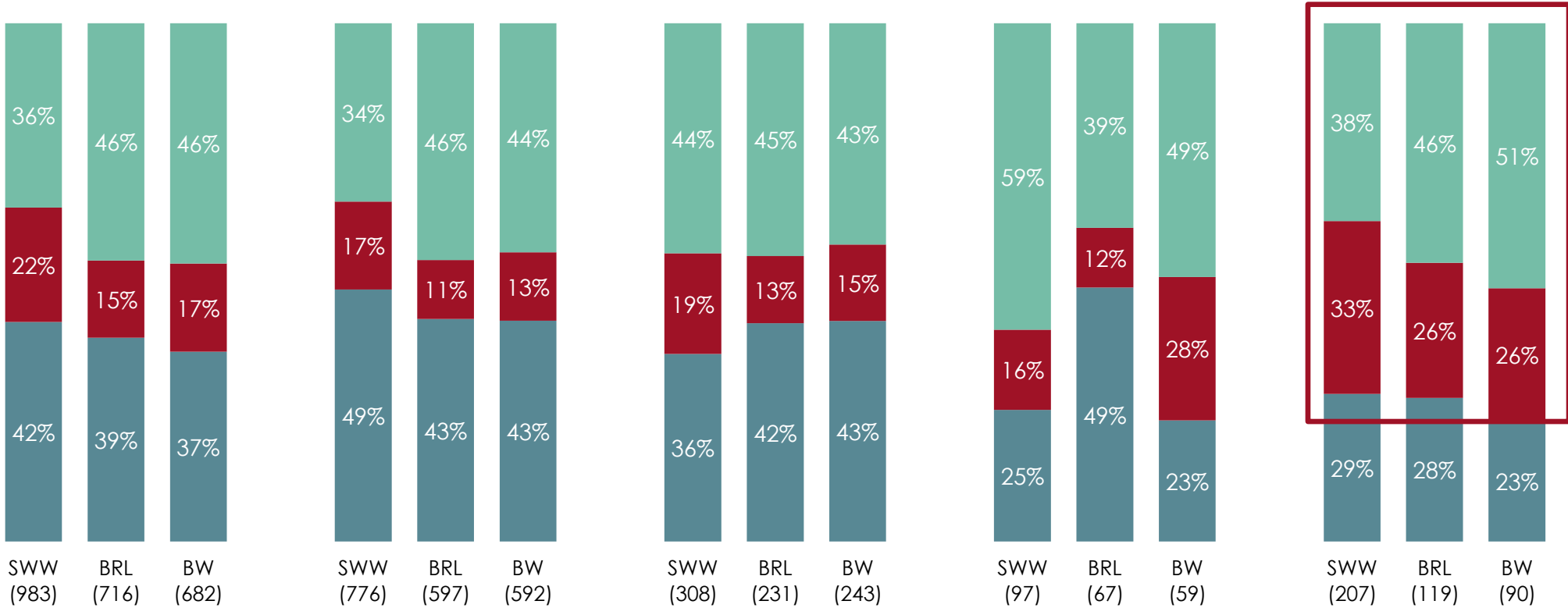
	SWW			BRL			BW		
	All	HH	NHH	All	HH	NHH	All	HH	NHH
Overall plan - affordability	21%	16%	34%	21%	17%	31%	26%	18%	45%
Overall plan - acceptable	67%	64%	72%	77%	76%	82%	79%	76%	85%
Water supply only plan - acceptable	69%	68%	72%	82%	82%	82%	81%	83%	76%
Sewerage only plan - acceptable	63%	62%	65%	66%	63%	76%	72%	70%	77%

Preferred phasing of water bill increase

There is a preference for the bill increasing sooner rather than later, though over a third give no opinion either way. Non household customers are more outspoken.

Which of the following options would you prefer?

- Starting sooner, spreading increases across different generations of bill-payers
- Starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer



Total HH & NHH	Household only	Household vulnerable	Household struggling	Non household
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Q9. Long term investment by [water company] will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **Base** Household and Non household bill payers: Total: SWW (983); BRL (716) BW (682) . **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**





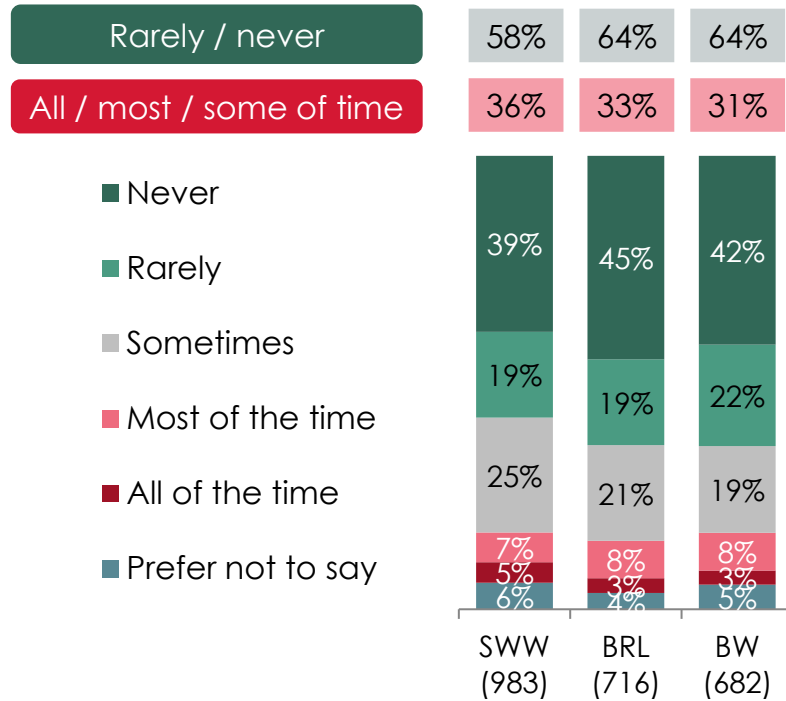
Context

A substantial minority are struggling with paying bills, and many are pessimistic

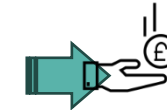
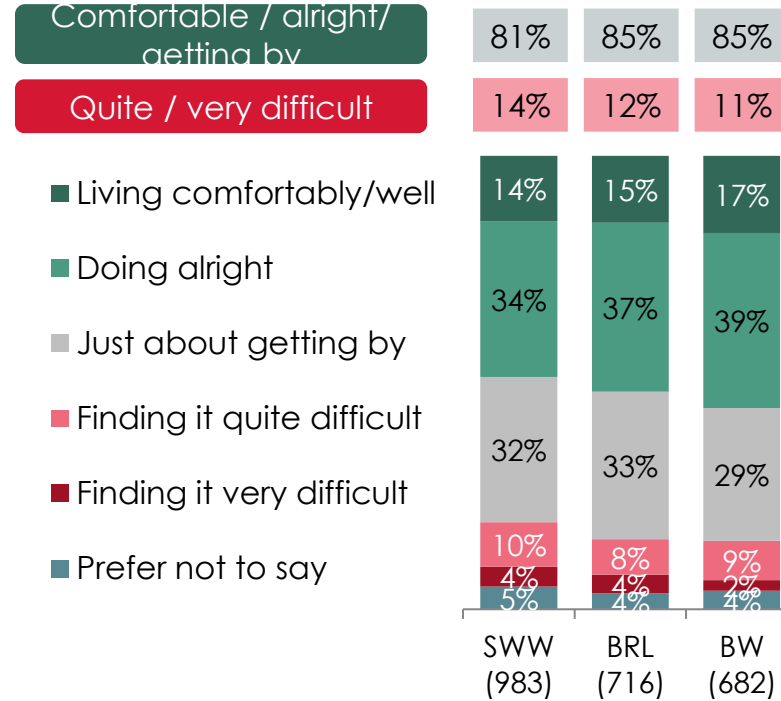
3 in 10 customers have struggled to pay at least one bill in the last year, and 1 in 10 are finding it 'difficult' to manage financially – indicating how widespread and significant the cost-of-living crisis is. More than a third think that things will get worse over the next few years.



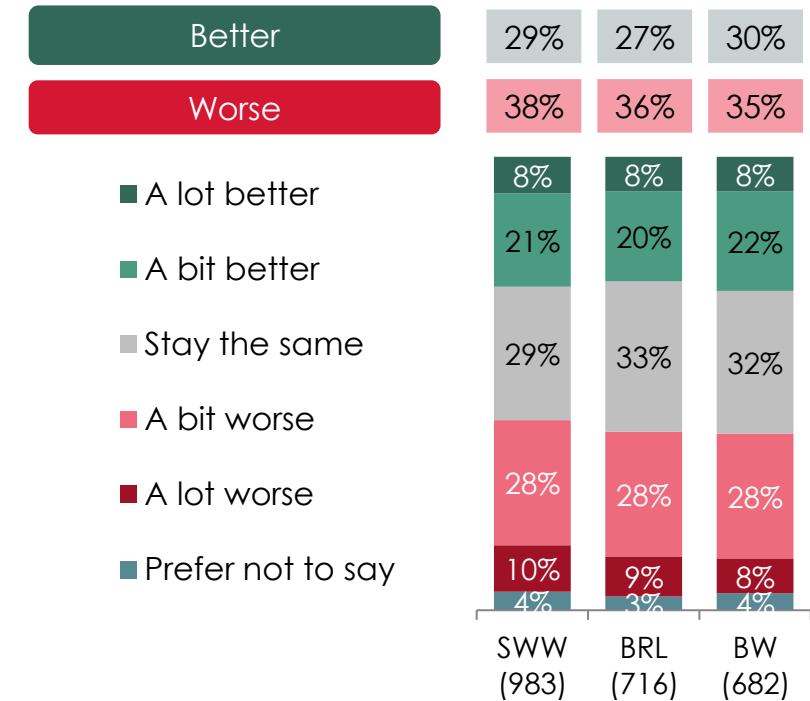
How often struggled to pay your bills in the last year?



How well managing financially now?



Expect financial situation to get...?



Q1. Thinking about your household's /organisation's finances over the last year, how often, if at all, have you struggled to pay at least one of your household/ it's bills?; **Q2.** Overall, how well would you say you are managing financially now? **Q3.** Thinking about your household's/organisation's financial situation over the next few years up to 2030, do you expect it to get...? **Base** Household and Non household bill payers: SWW (983) BRL (716) BW (682) ; **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Current financial situation – Qualitative insight (SWW)



Financial situation summary from Quantitative data

HH



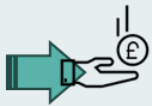
Struggled to pay bills in the last year

34%



Finding it quite or very difficult to manage financially

13%



Expect financial situation to get worse

44%

Q1 / Q2 / Q3
Base Household bill payers: 776



Qualitative insights (focus on household customers)

- The qualitative stage of research (in May 2023) showed a similar picture to the larger scale quantitative sample; no dramatic change in wider sentiments between the two phases of research – although indications of a slightly less pessimistic long-term outlook at the Quant stage.
- In the qualitative research:
 - Over a half of the domestic sample (22/37) said they fell somewhere between 'just getting by' and 'struggling' when it comes to household finances
 - ...and most (32/41) thought that the current economic situation was worsening
- Qualitative research shows that people whilst customers are managing financially, they are acutely aware of how changeable circumstances can be, and it is not often in their favour

*"In the next 5 years we'll be teetering on the brink...the worldwide picture doesn't look great."
HH Exeter*

*"I think the financial situation is getting worse."
HH Newquay*

*"I'm not in a state where I can't pay my bills but I do need to be monitoring more my spending."
HH Exeter*

*"My mortgage rate is about to go from 0.97% to 4.7% - I'm terrified about the next 5 years..
HH Barnstaple*

*"We dread every March when the rent contract expires and the landlord puts the rent up."
HH Newquay*

*"It feels like it is stabilising in summer and spring but it will probably get a lot worse in the winter."
HH Newquay*

Current financial situation – Qualitative insight (BRL)

Financial situation summary from Quantitative data



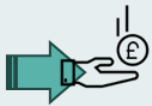
Struggled to pay bills in the last year

31%



Finding it quite or very difficult to manage financially

12%



Expect financial situation to get worse

40%

Q2 / Q3 / Q4
Base Household bill payers (597)



Qualitative insights (focus on household customers)

- Broadly, the qualitative stage of research (in May 2023) presented a more pessimistic picture to the larger scale quantitative sample. comparable picture to the larger scale quantitative sample; those at the qualitative stage felt that their financial situation would be worse off in the future
- In the qualitative research:
 - the majority of the domestic sample (22/38) said they fell somewhere between 'just getting by' and 'struggling' when it comes to household finances
 - ...and most (37/47) thought that the current economic situation was worsening
- A range of circumstances evident in the qualitative research show that even people with saying they are 'managing' financially, pressure is felt as wages are not keeping up with the cost of living and inflation and there is even less discretionary budget

*"Cost of living and pressure on my wife's public sector job is forcing lifestyle choices."
HH Bristol Answer: 6/10*

*"Prices are going up everywhere and my income can't keep pace with it."
HH Bristol Answer: 2/10*

*"My salary is not very large and has not gone up with inflation, all my bills are going up and I am concerned as I am nearing retirement when my income will decrease."
Future Customer Bristol Answer: 6/10*

*"There isn't much excess income or spare budget left so things are tight."
Future Customer Bristol Answer: 5/10*

Current financial situation – Qualitative insight (BW)

Financial situation summary from Quantitative data



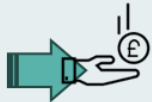
Struggled to pay bills in the last year

26%



Finding it quite or very difficult to manage financially

9%



Expect financial situation to get worse

41%

Q1/Q3. / Q4.

Base Household bill payers (592)



Qualitative insights (focus on household customers)

- A similar story emerges from the qualitative and quantitative research; perceptions of financial circumstances are broadly aligned – though customers seemed less pessimistic in the quantitative stage.
- In the qualitative research:
 - About a half of the domestic sample (10/21) said they fell somewhere between 'just getting by' and 'struggling' when it comes to household finances
 - ...and the vast majority (18/21) thought that the current economic situation was worsening
- A range of circumstances evident in the qualitative research show that even people with higher incomes and no financial vulnerability can *feel* as if they are struggling
- Qualitative research showed that many people were pre-occupied by price rises happening in 'the here and now'.

"I work full time on a well above average salary and my wife still had to go back to work after a few months of maternity just to make ends meet." HH Salisbury

"I have a new job with a relatively low income which barely covers my day to day expenses, and I also have debts to repay. I don't have money left over to save each month" HH Taunton

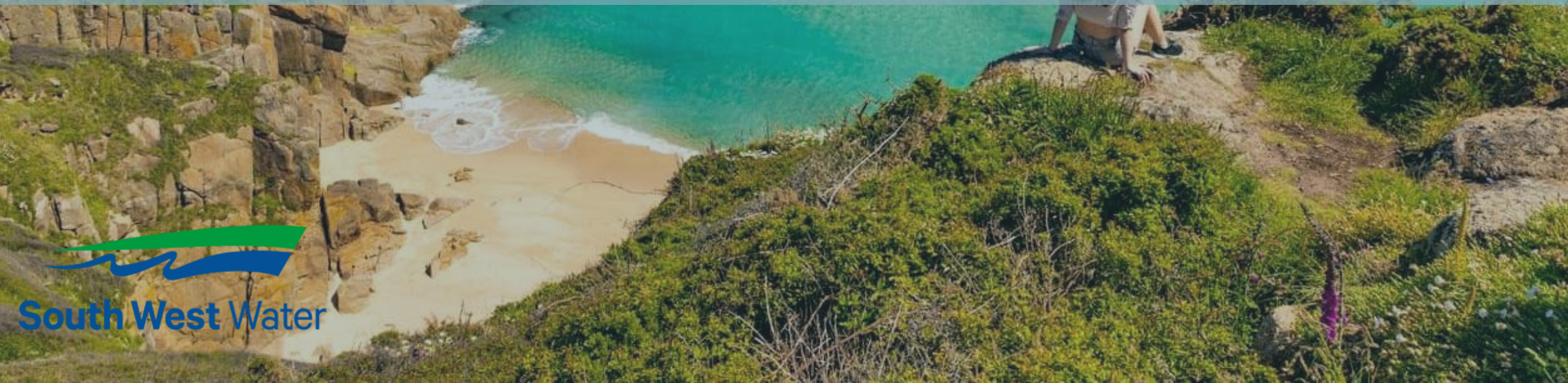
"Because, while I am making the bills each month, there is never any money to put aside." HH Bath

"I have to think about the here and now." HH Salisbury

"The normal weekly shop is getting more and more expensive... some places are just using it as an excuse to make profit" HH Salisbury



South West Water



South West Water



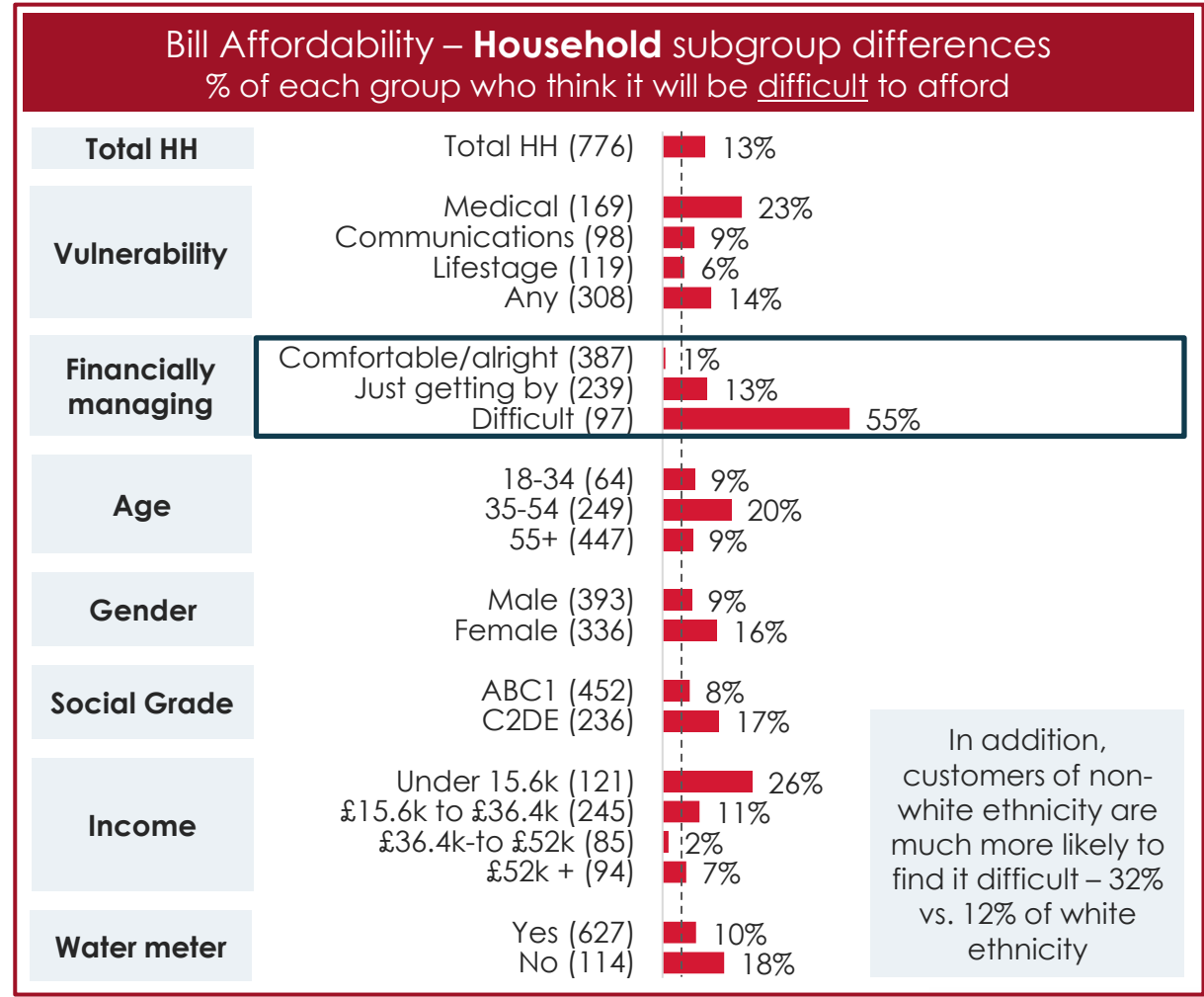
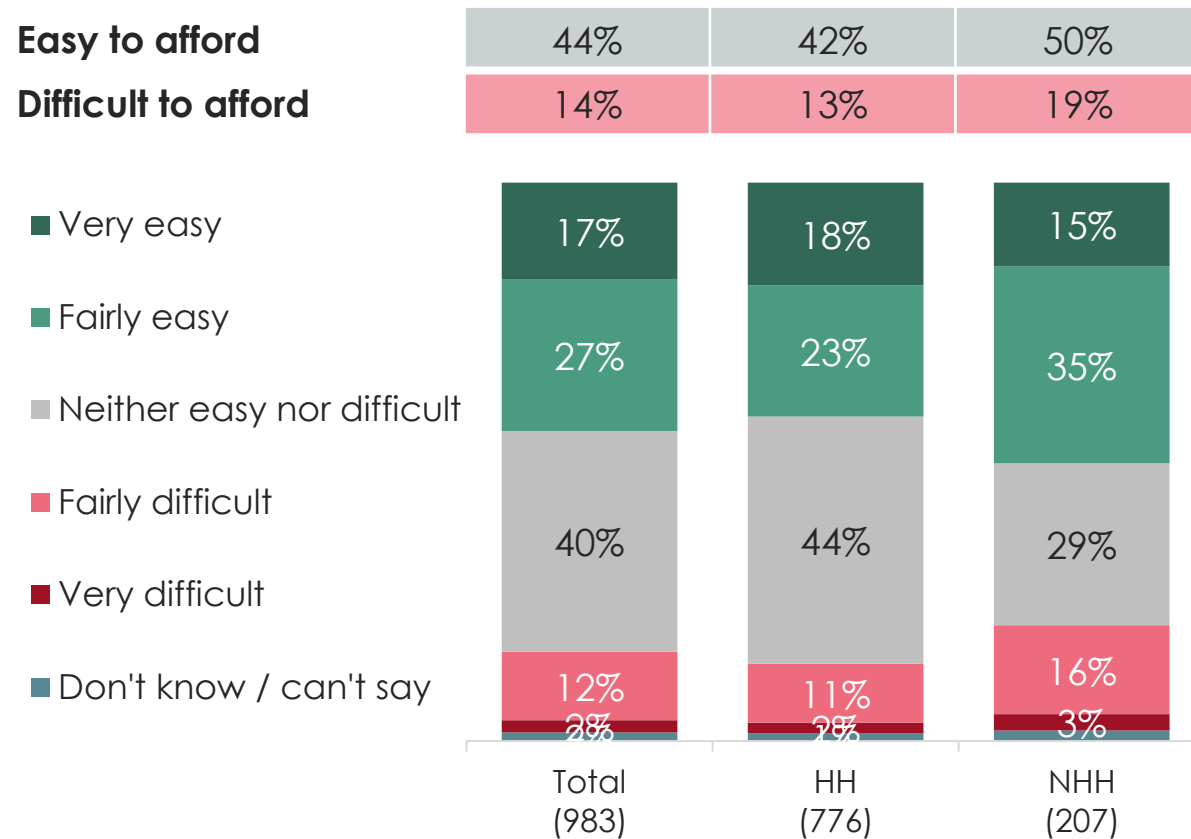
Current bill affordability

Current water and sewerage bill affordability

A higher proportion currently find their water bill easy to afford than difficult. Those who are finding it difficult to manage financially in general are much more likely to be struggling to pay their current water services bill.

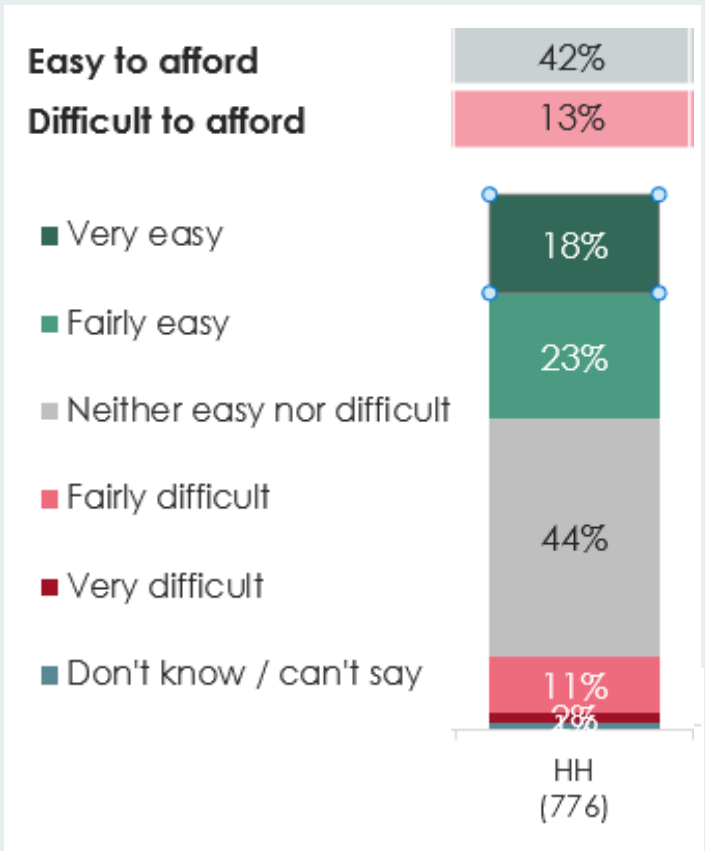


How easy or difficult to afford current water & sewerage bill?



Q4. How easy or difficult is it for you to afford to pay your/your organisation current water and sewerage bill? **Base** Household and Non household bill payers: Total (983) **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

How easy or difficult to afford current water and sewerage bill? Quantitative data HH



Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill?
Base HOUSEHOLD bill payers (776)



Qualitative insights

- Affordability of customers' current water and sewerage bill in the qualitative research was a similar picture to the quantitative research:
 - A minority (2/39) of household customers found it difficult to pay their current water and sewerage bills
- Qualitative research suggests that water bills are the ones they worry about least (perhaps as it has not experienced a notable increase, like energy bills)

*"I feel like water hasn't gone up relative to other bills."
HH Exeter*

*"Compared to other bills I worry about my water bill the least."
HH Truro*

*All bills have and are rising, wages are staying the same.
HH Exeter*

*The general increase in the cost of living has affected every single one of my outgoings
HH Exeter*



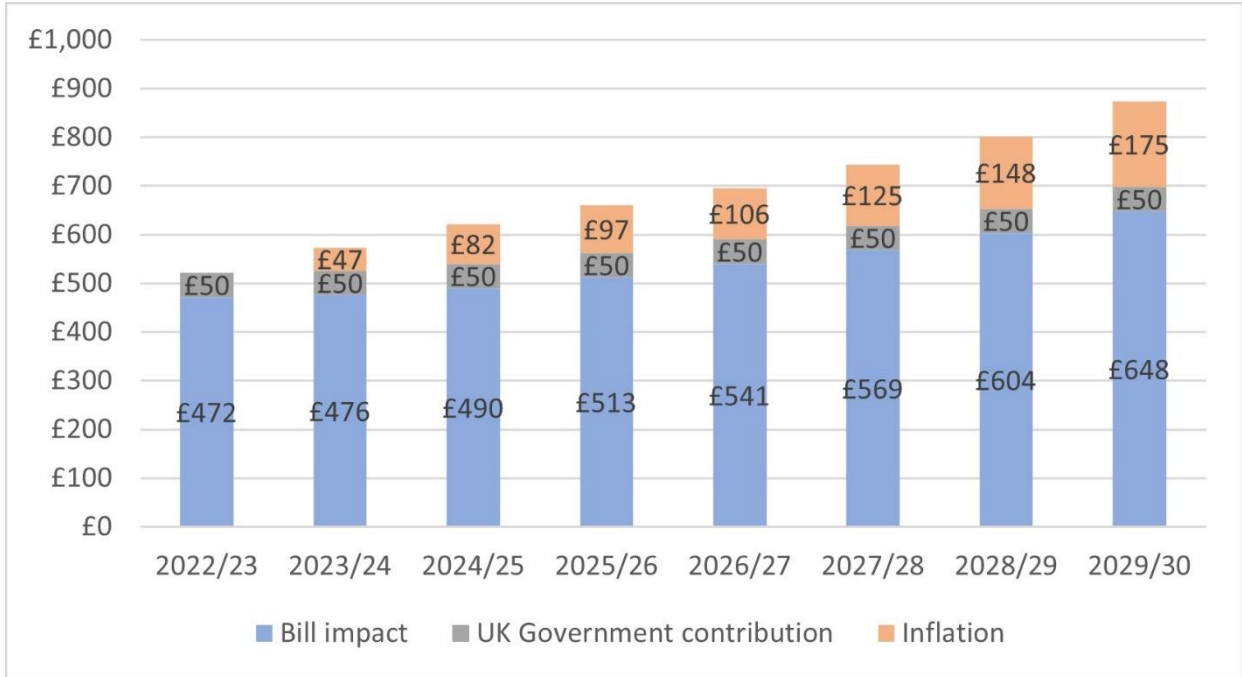
Future bill affordability for business plan

Bill Impact affordability – stimulus shown

Household customers were shown the bill increases for 2022-23 to 2029-30, based on their current annualised bill (and whether or not they are on social tariff, as flagged in the customer sample). Where bill information was not available, a bill profile based on the average annualised bill was shown

Non-household customers were shown the bill increases for 2022-23 to 2029-30, based on a bill of £1000 for 2022-23.

The bill is split into the proposed costs to cover the investments in water and sewerage services needed over the next few years, and predicted inflation (in orange).



Example personalised bill profile shown for SWW– with GC50

For SWW, the following text was also shown:

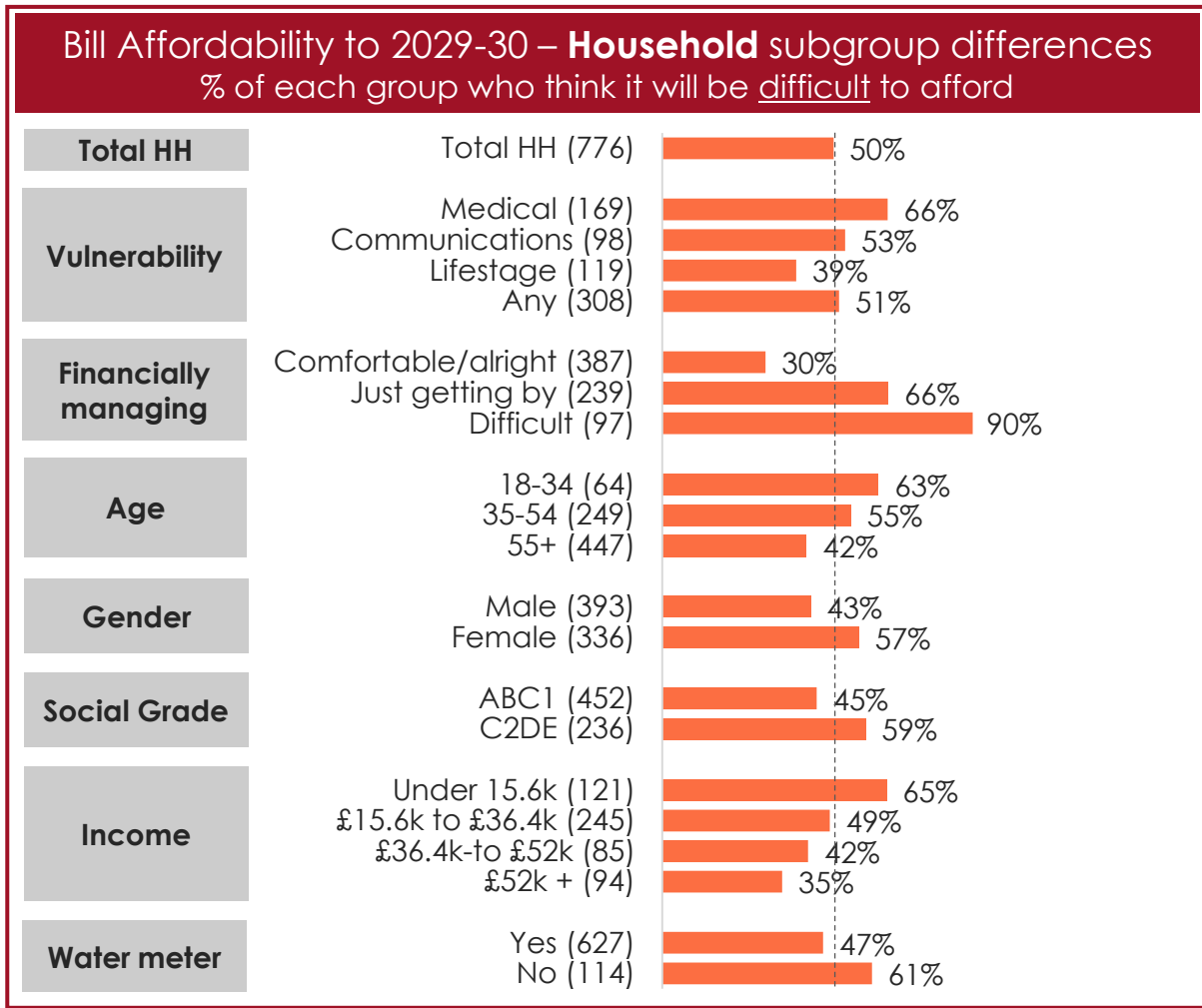
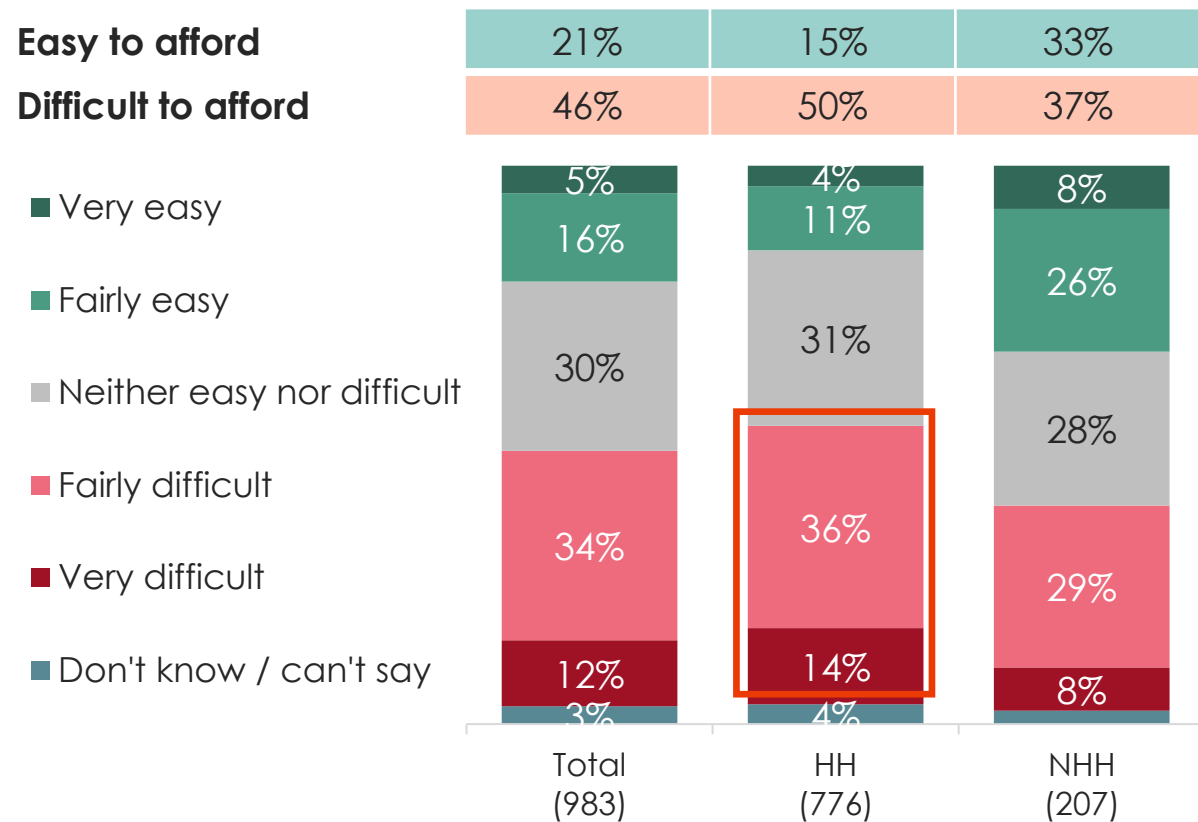
Since 2013, the UK Government has contributed £50 each year to the bills for SWW household customers (reducing every household’s annual bill by £50). This is in recognition of the fact that the 3% of the nation’s population which lives in the SWW region has been supporting investment in one third of the country’s bathing waters. This contribution is agreed on an annual basis with the Government, so we cannot be certain how long it will run for.

Almost a half think they will struggle with the future bill increases – NHH customers are more confident that they can easily afford the future bills than household customers

Lowest income households, lower social grade, and households who do not feel 'comfortable or alright' financially are more worried about being able to afford – a clear role for development of appropriate support.



Affordability of water & sewerage bills up to 2029-30



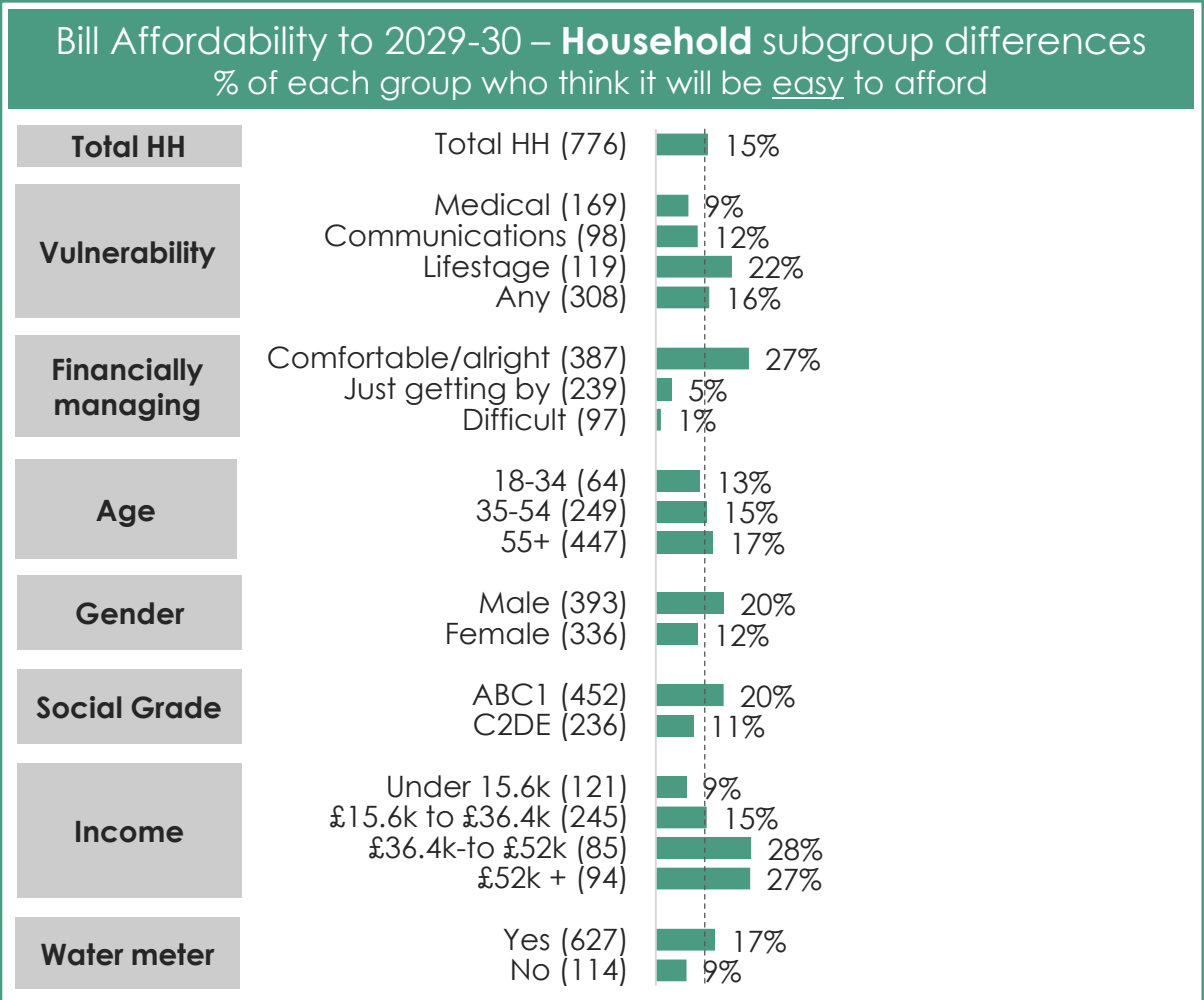
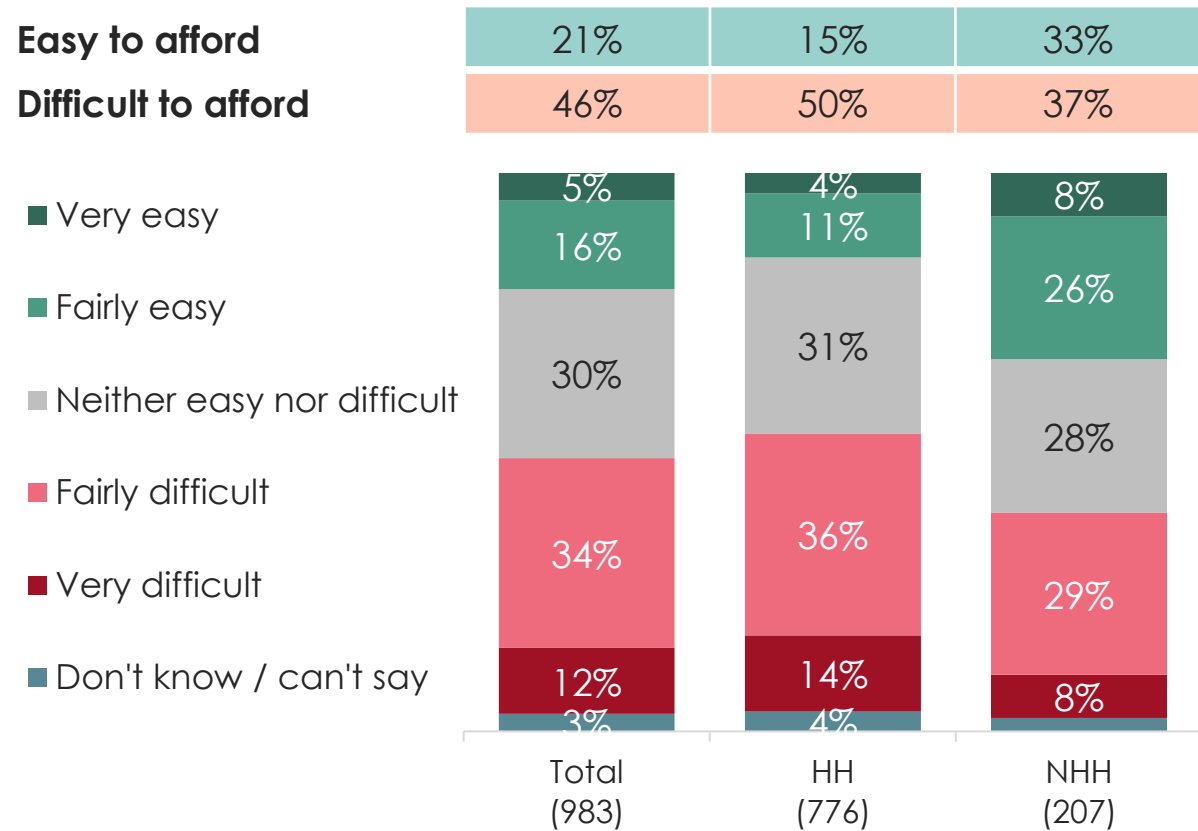
Q5. How easy or difficult do you think it would be for you to afford these water and sewerage bills?
Base Household and Non household bill payers: Total (983)
WEIGHTED % FIGURES and UNWEIGHTED BASE SIZES are displayed

A third of NHH customers think it will be 'easy' to afford the bill profile to 2029-30, few household customers have this sentiment – even those who are comfortable financially

In the current financial climate, even higher income bracket households are reluctant to say that the proposed bill increases will be 'easy' to afford; many choose the neutral answer of 'neither easy nor difficult'



Affordability of water & sewerage bills up to 2029-30



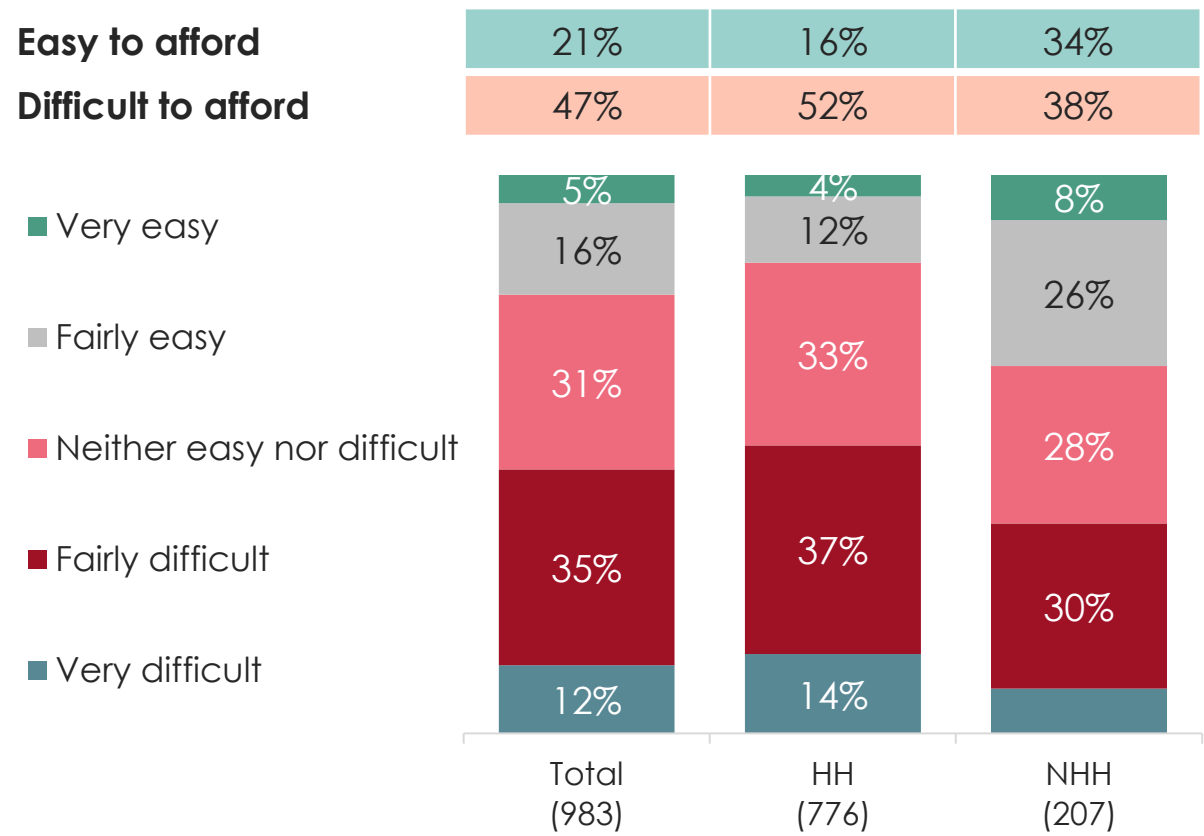
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In the current financial climate, even higher income bracket households are reluctant to say that the proposed bill increases will be 'easy' to afford; many choose the neutral answer of 'neither easy nor difficult'



Affordability of water & sewerage bills up to 2029-30

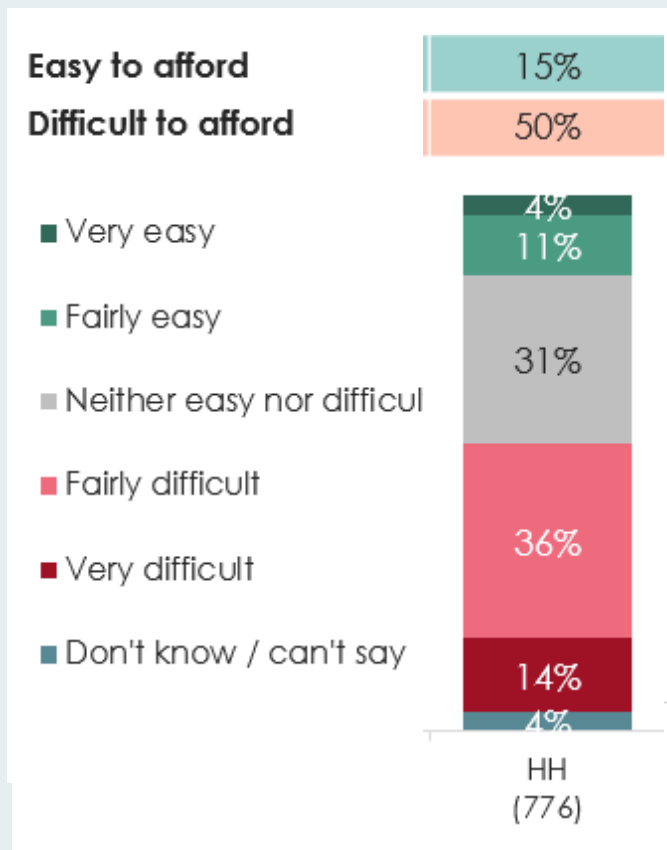


Data excluding 'don't know'

Proposed plan bill affordability – Qualitative context



Affordability of water & sewerage bills up to 2029-30 (Total households)



Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills?

Base HOUSEHOLD bill payers (776)



Qualitative insights

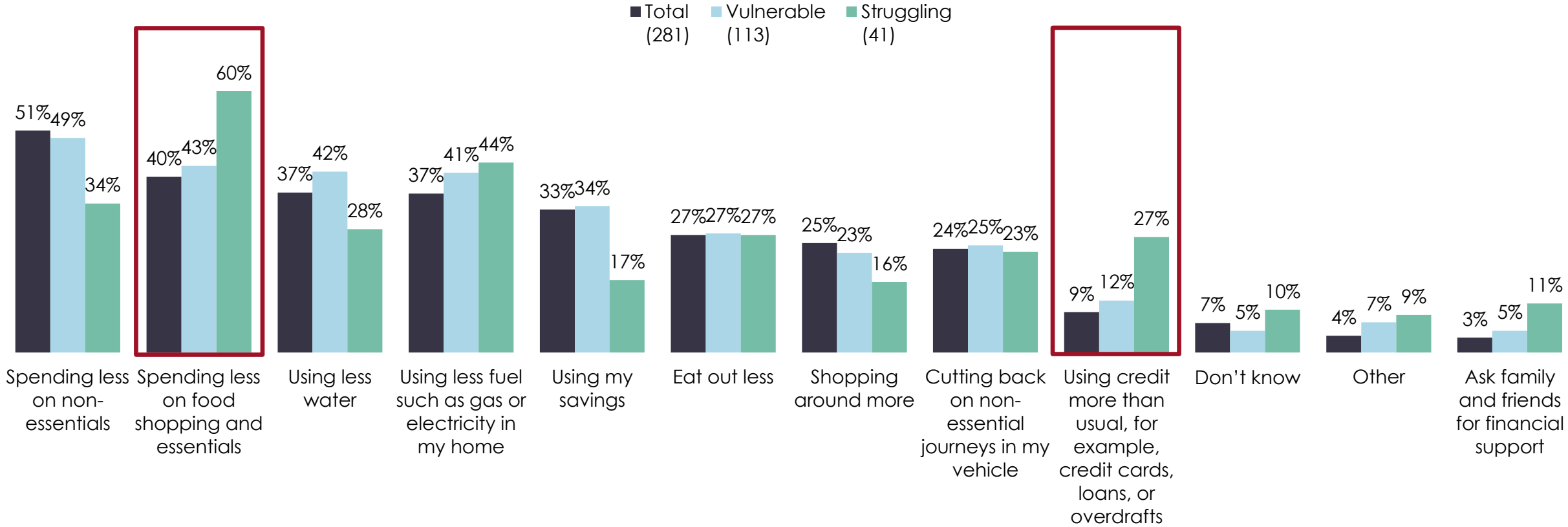
- Affordability of the proposed plan in the qualitative research was a very similar picture to the quantitative research:
 - 18/58 of the household sample (SWW supply area) said it would be easy to afford the proposed plan and 11/58 said it would be difficult to afford.
- The qualitative research showed customers were surprised to see both....
 - the **rate** of increase
 - the scale of **inflation**
- While most in the qualitative research state that they are able to afford the bill increases associated with the proposed plan, they do not welcome the extra costs and expect to see significant improvements for the level of bill increase projected.

*"To what extent can the water company say to government lobby to charge developers?"
HH Barnstaple*

How customers would pay for (increased) water bills between 2025 and 2030

The most widespread strategy of paying higher bills is by curbing discretionary spend but also limiting spend on day-to-day essentials like food, gas and water. Those struggling financially much more likely to spend less on essentials, as well as using credit and loans

Which of the following would you need to do to pay for the water bill increases between 2025 and 2030? (Those who say they would struggle to pay the proposed bill from 2025-2030)



Q6. Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?
Base Household bill payers who would not find it easy to pay for the increase in water bills Total households (281); Vulnerable households (113) Struggling households (41). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

A close-up photograph of a person's hands interacting with a silver laptop. The left hand is pointing at the screen, while the right hand is on the trackpad. The person is wearing a black fitness tracker on their left wrist and a silver ring on their right ring finger. A semi-transparent dark blue horizontal bar is overlaid across the middle of the image, containing the text "Business plan components" in white. The background is a blurred office setting.

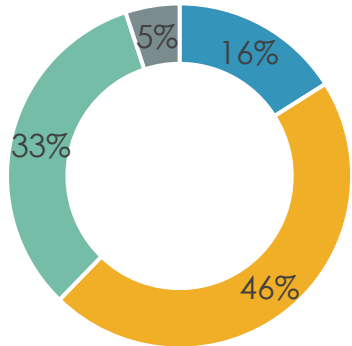
Business plan components

Business plan: Areas of priority – Summary (SWW)

Which of these three parts of the business plan is the most important to you?

Performance Commitments – Water

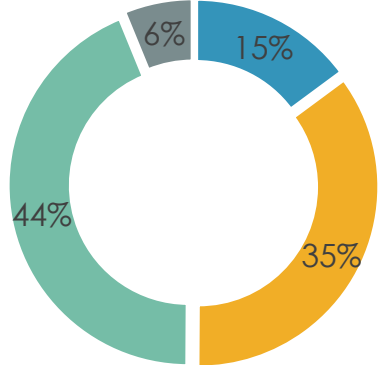
All customers (983)



- Water supply interruptions lasting longer than 3 hours
- Reducing leaks
- The appearance, taste and smell of tap water
- Don't know/Can't say

Additional Plan Components – Water

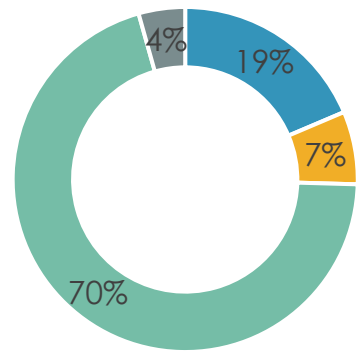
All customers (983)



- Installing smart water meters
- Developing new and more flexible water supplies
- Improving tap water quality through upgrading treatment works and replacing lead pipes
- Don't know/Can't say

Performance Commitments – Sewerage

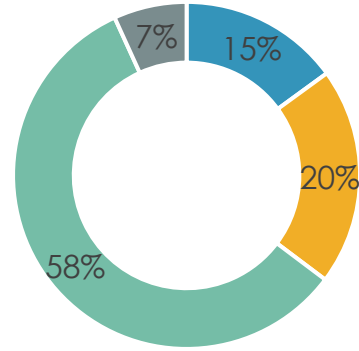
All customers (983)



- Sewage flooding of properties - inside properties
- Sewage flooding of gardens, outbuildings or access points
- Pollution of rivers and bathing waters
- Don't know/Can't say

Additional Plan Components – Sewerage

All customers (983)



- Net zero operational emissions and creating new habitats
- Reduce storm overflow spills
- Improving river and coastal water quality by preventing discharge of excess nutrients
- Don't know/Can't say

Q7. Based on what you have just read, which of these three parts of the business plan is the most important to you?
 Base Household and Non household bill payers: Total (983) **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Water Supply Performance Commitment - Importance

Reducing leaks is rated the most important of the water supply PCs overall, although those struggling to pay place slightly greater importance on water quality, and a larger minority of NHH customers rate supply interruptions as most important

For detailed stimuli shown to respondents, please see Appendix

Water supply interruptions, lasting longer than 3 hours

What does this mean? It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected.

How are South West Water performing on this? Water companies are measured on the length of time properties are without water. The measure used is the duration without water for more than 3 hours by minutes per property. South West Water's performance on this measure is currently 13 mins 40 seconds. **South West Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Achieve the target level for supply interruptions by 2025 and then maintain this level up to 2030.
How will they do it?	<ul style="list-style-type: none"> Repair water pipes. Replace the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.

Reducing leaks

What does this mean? Leaks can affect customers if their water supply is affected. They are often unnoticed if underground. But leakage is often in the media and has a cost to people on their bills and a cost to the environment.

How are South West Water performing on this? Companies are measured on the amount of water lost due to leaks from water mains and pipes. The measure used is annual leakage per property (litres per day). South West Water's annual leakage currently stands at 108 litres per property. **South West Water met their target for this metric last year.**

What is the plan for this?

Reduce leakage from 103 litres per property per day in 2025 to 78 litres in 2030 and so reduce the amount of water South West Water need to take from the environment.

- Repair leaks when they find them.
- Replace old water mains.
- Help customers to replace their leaky pipes too.

Cost on bill This will add £7 to the average annual bill (excluding inflation) by 2030.

The appearance, taste and smell of tap water

What does this mean? Tap water may look, taste/smell different to usual. Often, if water is not to drink, people may prefer bottled water until it returns to normal.

How are South West Water performing on this? Customers are measured on the number of contacts received regarding the appearance, taste and smell of tap water. The number of customer contacts received is currently 1.55 contacts per 1,000 population. South West Water's annual target is 1.33 per 1,000 population in 2025 and 1.0 per 1,000 population in 2030. **South West Water met their target for this metric last year.**

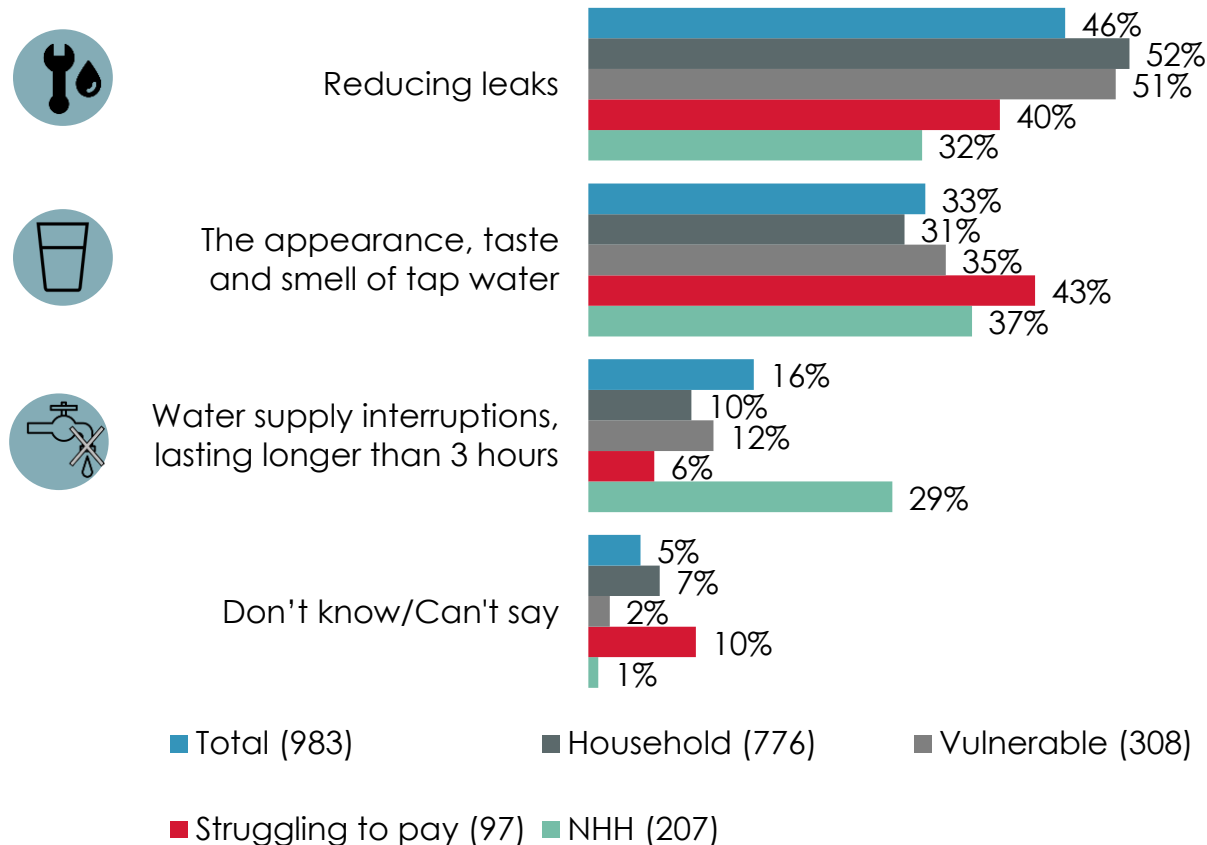
What is the plan for this?

Replace cast iron mains which can cause a brown tinge to tap water

Cost on bill This will add £6 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Common Performance Commitments (Water)

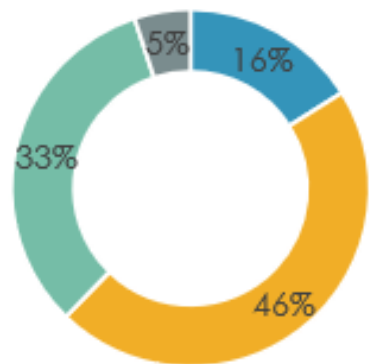
SWW Customers



Which of these three parts of the business plan is the most important to you? Quantitative data

Performance Commitments – Water

All customers (983)



- Water supply interruptions lasting longer than 3 hours
- Reducing leaks
- The appearance, taste and smell of tap water
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Supply interruptions:** while seen as lower priority for improvement, no improvement beyond 2023 seems unambitious – willing to see a small bill impact.
- **Reducing leaks:** this is a main priority for many customers – but spend is no greater than other less pressing areas. Feels unfair to impose temporary usage bans when leakage is such a big problem – something the water company should be addressing first before asking customers to change behaviours.
- **Appearance, taste and smell of tap water:** less of a priority than other areas such as reducing leakage but still important. Some question the way that water quality is measured – customers feel quite a lot of people wouldn't call in, even if they saw a drop in quality.



[Reducing leaks]
 "Personally, I think more should be done on leakage and pollution and if you're taking [money] from water quality, internal and external sewer flooding I think [the former] is a far pressing priority..." Newquay



[Appearance, taste and smell]
 "The data is not on a great representation of people who have a problem of water as most people don't have time to call."
 HH Newquay

Additional water supply plan components – Importance

Of the three additional water supply plan components, replacing lead pipes has the biggest share of the vote for which is most important, across all the key groups. Installing smart water meters is, by some margin, rated least important for household customers.

For detailed stimuli shown to respondents, please see Appendix

South West Water Installing smart water meters

What does this mean? Smart water meters can encourage water saving by increasing customer awareness of their water use. They can reduce wastage by helping identify leaks, and they make bills fairer, as all customers pay for what they use.

What is the current situation? 80% of properties in the South West Water region have a basic water meter, but very few have a smart water meter so it is not possible to see water use in real-time.

What is the plan for this?

Benefit by 2030 Installing smart water meters will help save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also enable new, fairer ways to charge customers.

How will they do it?

- A programme of installing smart meters: 350,000 smart meters installed by 2030 (and all customers to have one by 2040).
- Support customers to use less water with water efficiency advice and support.

Cost on bill This will add £3 to the average annual bill (excluding inflation) by 2030.

South West Water Improving tap water quality through upgrading treatment works and replacing lead pipes

What does this mean? Lead pipes still connect some customers' properties to the water mains, meaning there is a risk that traces of lead get into the water. There is also a very small risk of microbiological contamination.

What is the current situation?

- Lead pipes on customers' properties affect 80,000 properties. Currently harmless chemicals can get into the water supply to prevent the impact of lead pipes on health.
- Low risk of microbiological contamination of water which would result in a health notice.

What is the plan for this?

Benefit by 2030 Reduce risk of lead in water for 5,000 properties by replacing lead pipes.

How will they do it?

- Offer a mix of replacement for lead pipes by customers; incomes received.
- Upgrade water treatment works.

Cost on bill This will add £11 to the average annual bill (excluding inflation) by 2030.

South West Water Developing new and more flexible water supplies

What is this? Investing in new supplies of water such as reservoirs and increasing the capacity to treat this water. Investing in large pipes to move water around the region more flexibly.

What is the current situation? Climate change and growing population mean that in future there will be greater pressure on sources of water, and more water will need to be taken (or 'abstracted') from environmentally sensitive sites.

What is the plan for this?

Benefit by 2030 Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.

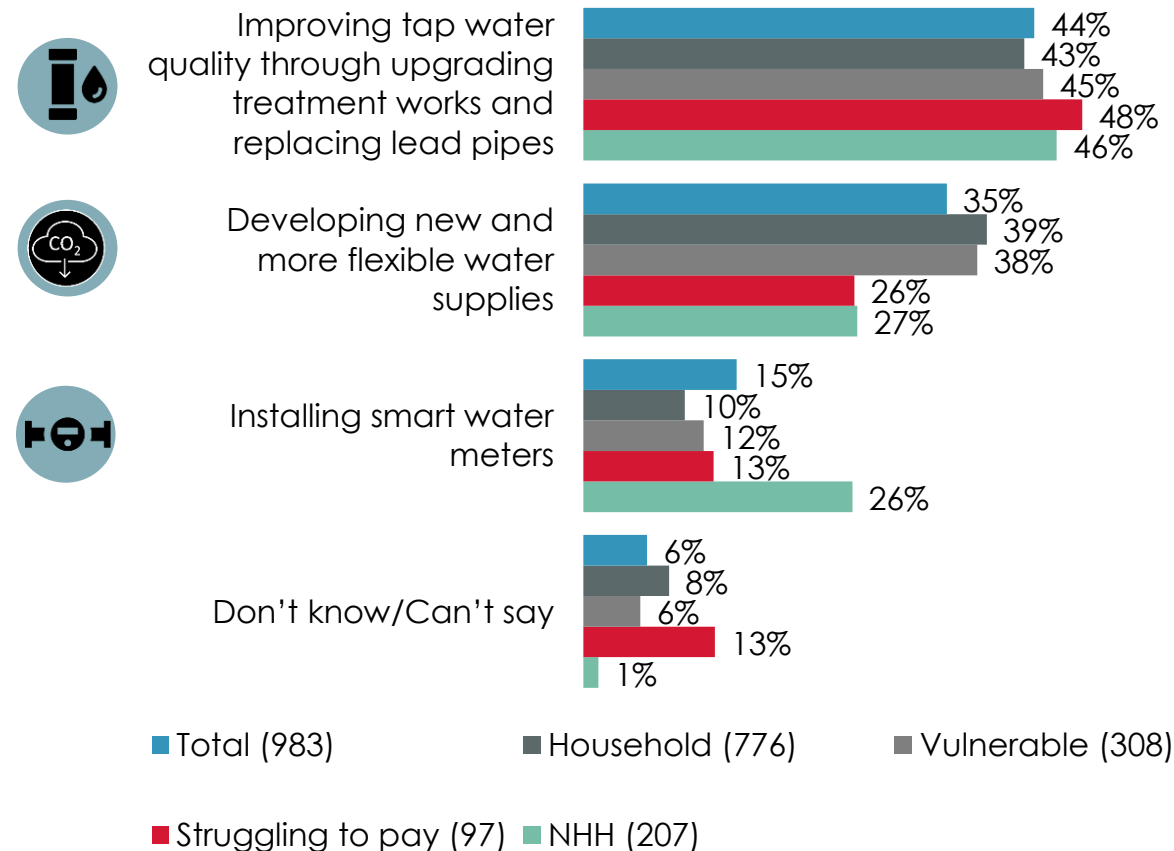
How will they do it?

- Develop a new reservoir from a disused quarry.
- Develop new groundwater sources.
- Increase water treatment capacity.
- Build a new water re-use plant to recycle wastewater into clean water.
- Start to build a major new regional reservoir in the Mendip Hills.

Cost on bill This will add £17 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Additional Plan Components (Water)

SWW Customers



Q7b. Based on what you have just read, which of these three parts of the business plan is the most important to you?

Base Household and Non household bill payers: Total (983)

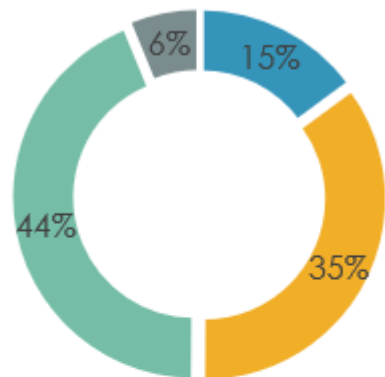
WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES

Which of these three parts of the business plan is the most important to you? Quantitative data

Additional Plan Components

– Water

All customers
(983)



■ Installing smart water meters

■ Developing new and more flexible water supplies

■ Improving tap water quality through upgrading treatment works and replacing lead pipes

■ Don't know/Can't say



Qualitative insights based on deliberative discussions

- Replacing lead pipes:** many are unaware of the presence – and risks – of lead pipes. Most were happy that phosphate dosing eliminates risk for the time being and are happy to see lead pipes replaced at a steady rate.

 - Confusion around which pipes would be replaced and who is responsible for what (i.e. in terms of property boundaries and inside/outside the home)
 - Some question why customers are paying to prioritise schools and hospitals (who would have budgets for building repairs)
- Developing new and more flexible water supplies:** this is important, but some customers feel that it should have been predicted and dealt with a long time ago




 - Pleased to see plans are in place to avoid future TUBs and manage demand from growing population (of both residents and tourists)
- Smart meters:** mixed views on smart meters as some customers don't understand how they'd benefit from them and it can feel as though it's a money-saving investment for South West Water more than anything

 - If customers are able to save money and benefit, they need to understand how much they could save
 - Some anxiety around smart meters – don't want to be controlled or monitored
 - Poor experiences with energy smart meters is widespread – don't want a repeat of this seemingly wasted investment
 - Some do accept the investment and can see the benefits, but still not considered urgent

Sewerage Performance Commitments – Importance

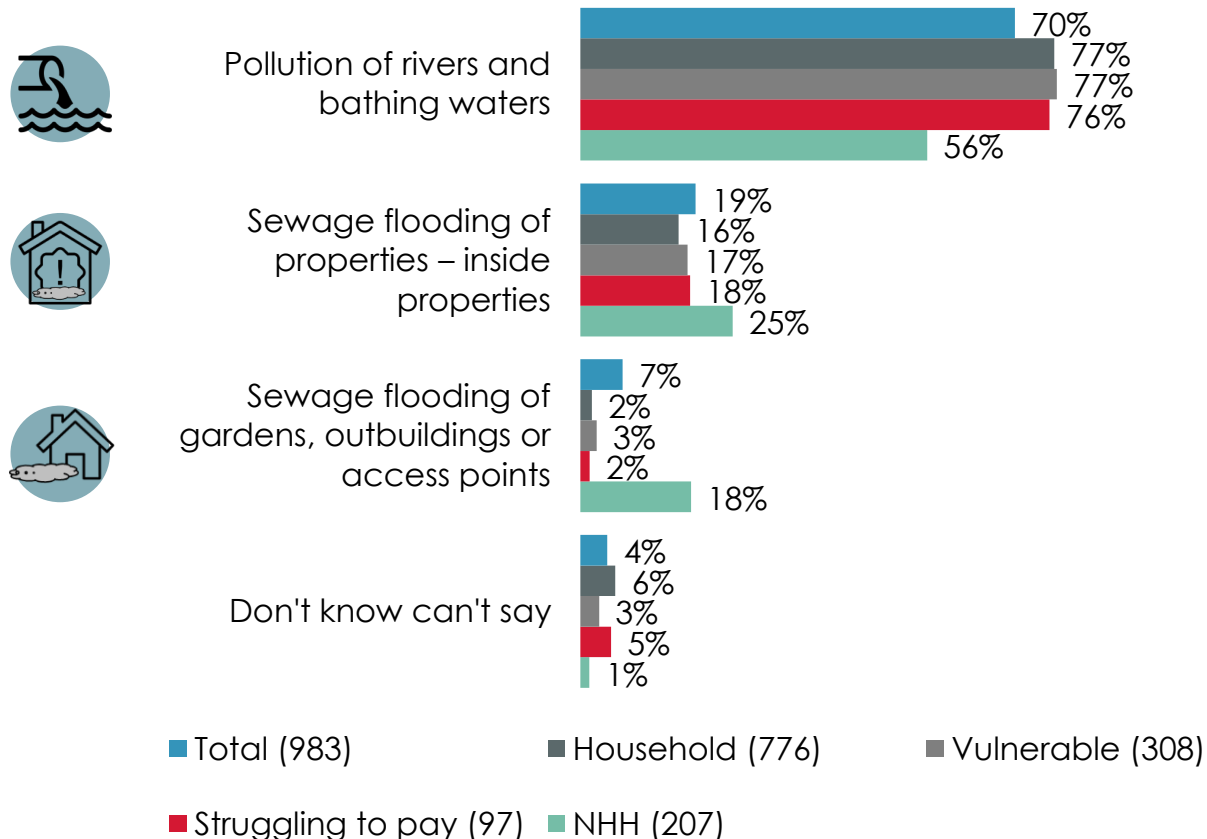
Addressing pollution issues is chosen as (clearly) the most important of the sewage PCs – 7 in 10 rating it most important of the three. External sewage flooding is least likely to be rated no.1 importance, behind internal sewage flooding.

For detailed stimuli shown to respondents, please see Appendix

 <p>Sewage flooding of properties – internal</p> <p>What does this mean? An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.</p> <p>How are South West Water performing on this? Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. South West Water currently has 0.76 incidents of internal sewer flooding per 10,000 connections. South West Water met their target for this metric last year.</p> <p>What is the plan for this?</p> <p>Benefit by 2030 Continue meeting target for the number of properties affected by internal sewage flooding, per 10,000.</p> <p>How will they do it? South West Water will continue to meet the target despite a growing population and more intensive rainfall.</p> <ul style="list-style-type: none"> They will increase sewer capacity through sewer upsizing and more storage tanks for wastewater This stops rainwater from getting into sewers where possible. <p>Cost on bill This will add £4 to the average annual bill (excluding inflation) by 2030.</p>	 <p>Sewage flooding of properties - external</p> <p>What does this mean? An escape of sewage into gardens or access points to peoples' properties is inconvenient and unpleasant and can restrict access.</p> <p>How are South West Water performing on this? Water companies are measured on the incidents of sewage flooding gardens or outbuildings. The measure used is the number of properties affected, per 10,000. South West Water currently has 18 incidents of external sewer flooding per 10,000 connections. South West Water met their target for this metric last year.</p> <p>What is the plan for this?</p> <p>Benefit by 2030 Maintain external flooding at 2025 target levels at 14 incidents per 10,000 connections</p> <p>How will they do it?</p> <ul style="list-style-type: none"> South West Water will improve performance from today's level and maintain the 2025 target level despite a growing population and more intensive rainfall South West Water will increase sewer capacity through sewer upsizing and more storage tanks for wastewater This will stop rainwater from getting into sewers where possible. <p>Cost on bill This will add £6 to the average annual bill (excluding inflation) by 2030.</p>	 <p>Pollution of rivers and bathing waters</p> <p>What does this mean? Discharges from sewage works can affect rivers and bathing waters have a minimal effect on the river water quality effect depending on the scale.</p> <p>How are South West Water performing on this? Water companies are measured on the number of incidents of pollution incidents per 10,000km of sewer. South West Water currently has 86.6 pollution incidents per 10,000km of sewer. South West Water did not meet for this metric last year.</p> <p>What is the plan for this?</p> <p>Benefit by 2030 Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6 per 10,000km of sewer in 2030; reduce pollution incidents to zero.</p> <p>How will they do it?</p> <ul style="list-style-type: none"> Enhance sewer maintenance programme to reduce sewer collapses and blockages – which often cause pollution Increase their ability to cope with more intensive rainfall, to prevent pollution and protect the environment. <p>Cost on bill This will add £10 to the average annual bill (excluding inflation) by 2030.</p>
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Which of these three parts of the business plan is the most important to you: Common Performance Commitments (Sewerage)

SWW Customers

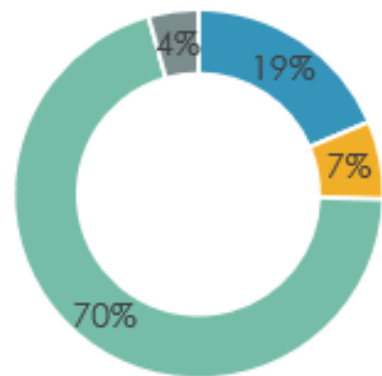


Q7c. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: Total (983). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Performance Commitments – Sewerage

All customers (983)



- Sewage flooding of properties - inside properties
- Sewage flooding of gardens, outbuildings or access points
- Pollution of rivers and bathing waters
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Pollution of rivers and bathing waters:** an area that matters a lot to customers; considering the perceived seriousness of the situation, customers would like to see more investment in this area.
- **Internal sewer flooding:** feels like an important enough issue to boost investment and be more ambitious – current targets aren't doing enough.
- **External sewer flooding:** similarly, important enough to increase investment and be more ambitious.



[Internal sewer flooding]
 "Less ambitious considering they are already achieving ahead of the target."
 HH Exeter




"The target for pollution is far too low."
 HH Truro

[The pollution commitment] "feels unrealistic and unachievable although I applaud the aim of having such a high target and though it's too ambitious at least they are trying."
 HH Barnstaple

Additional sewerage plan components – Importance

Improving river/coastal waters was voted the most important out of the three additional sewerage plan components. Reducing storm overflows slightly ahead of becoming operational net zero (which is slightly more important for NHH customers)




Net zero operational emissions and creating new habitats

What does this mean? Operational net zero means that a company, on balance, does not add carbon into the atmosphere through operation. It directly controls. Ways of achieving operational net zero can include planting trees and restoring peatland, which help create new habitats for wildlife.

What is the current situation? South West Water uses electricity and gas to run their sites, fuel vehicles and chemicals to treat water.

What is the plan for this?

Benefit by 2030	Make the company's operations carbon neutral and create 85,000 hectares of new natural habitats
How will they do it?	<ul style="list-style-type: none"> Moving entirely to electric vehicles Develop renewable energy at sites owned by South West Water Plant 300,000 trees to remove greenhouse gases from the atmosphere Peatland and seagrass restoration 1,000 'smart' ponds to create new habitats and help reduce flooding
Cost on bill	This will add £6 to the average annual bill (excluding inflation) by 2030.



Reduce storm overflow spills

Legally required


What is this? Storm overflows can spill sewage mixed with rainwater into rivers and the sea after heavy periods of rainfall.

What is the current situation? South West Water have a 'Water Fit' programme worth £330m to reduce storm overflows.

What is the plan for this?

Benefit by 2030	Reducing the use of 275 locations, prioritising larger sewers, bathing water quality and environmentally sensitive sites will spill fewer tonnes of sewage per annum.
How will they do it?	Use a mix of solutions including larger sewers, and slowing down flows in treatment works, stopping rainwater from our sewers where possible, and slowing down rainfall through smart ponds.
Cost on bill	This will add £55 to the average annual bill (excluding inflation) by 2030.

For detailed stimuli shown to respondents, please see Appendix



Improving river and coastal water quality by preventing discharge of excess nutrients

Legally required

What does this mean? The quality of water in rivers and estuaries is negatively affected by excess nutrients like nitrogen and phosphorus. These get into rivers from water companies' wastewater treatment works, as well as industry and agriculture.

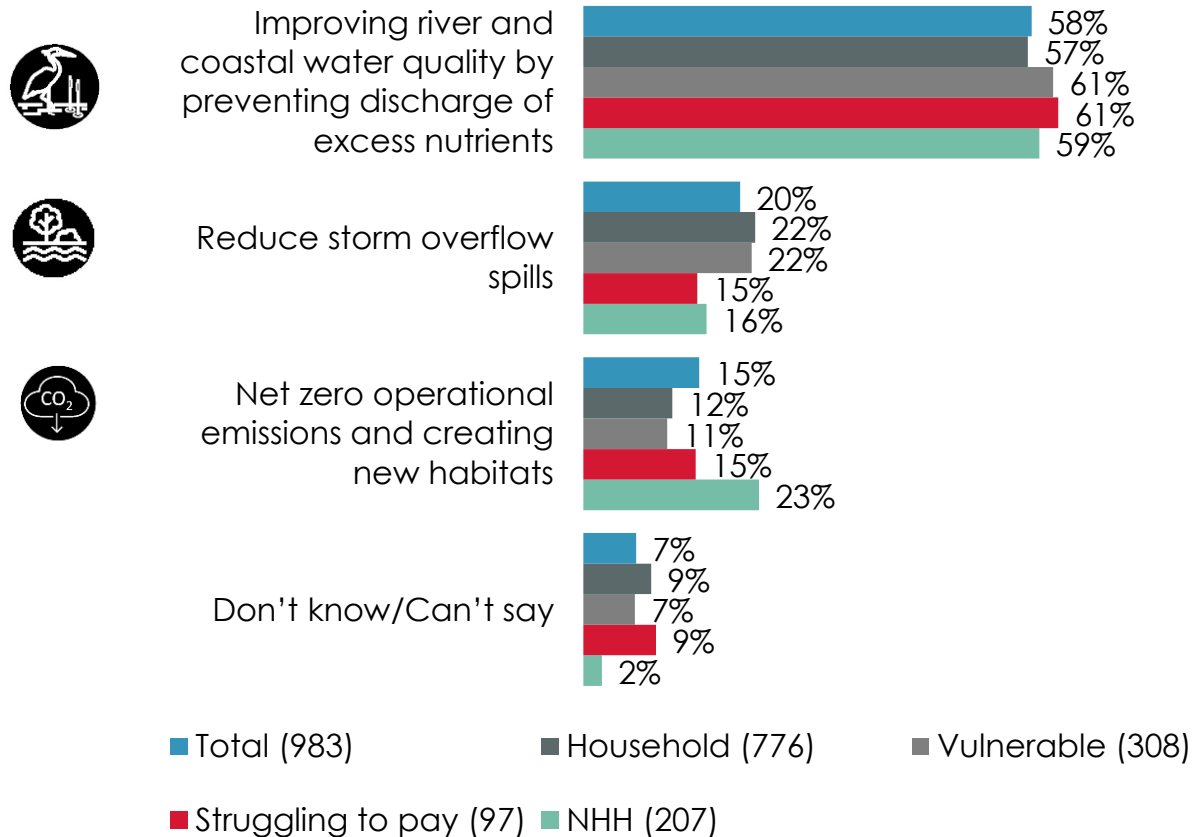
What is the current situation? South West Water meet current legal standards for levels of nutrients they discharge into rivers from their treatment works. But tougher standards are being introduced to improve water quality in rivers and estuaries. In some environmentally sensitive areas, the new legal requirements mean housing developments have been stopped – as they would cause excessive discharge of nutrients into nearby rivers.

What is the plan for this?

Benefit by 2030	Halving negative impact of wastewater treatment works on rivers (as measured by The Environment Agency) and improving river & coastal water quality.
How will they do it?	<ul style="list-style-type: none"> Upgrade 37 wastewater treatment works to meet tighter environmental standards, including 7 works to enable new housing development.
Cost on bill	This will add £18 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Additional Plan Components (Sewerage)

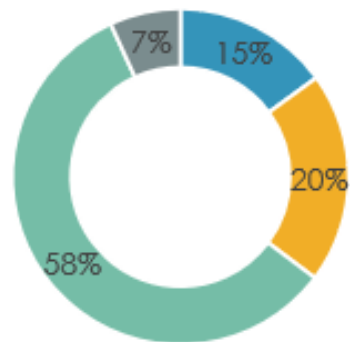
South West Water Customers



Which of these three parts of the business plan is the most important to you? Quantitative data

Additional Plan Components – Sewerage

All customers
(983)



- Net zero operational emissions and creating new habitats
- Reduce storm overflow spills
- Improving river and coastal water quality by preventing discharge of excess nutrients
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- Improving river and coastal quality (legally required):** health and safety of rivers and the sea is extremely important to customers in this region

 - They are supportive of any work to be done to ensure that the river and coasts are protected
- Reduce storm overflow spills (legally required):** tackling sewage spills is a high priority for customers

 - Limited understanding of why they happen but want to see water companies take responsibility for ensuring they do not continue
- Net zero:** generally, customers do expect all companies to make plans to move towards net zero

 - But unsure why customers are being asked to pay for this – feels like the responsibility of South West Water

"I don't believe we should be paying for anyone to be 'greener', It is everyone's responsibility to make the changes necessary. Are you going to pay me for being more environmentally friendly?"
HH Newquay

"SW Water should use their profits and keep our bills as low as possible. High quality drinking water should be a human right along with keeping our seas and waterways clean for our fauna."
HH Newquay

A close-up photograph of a person's hands interacting with a silver laptop. The left hand is pointing at the screen, while the right hand is on the trackpad. The person is wearing a black fitness tracker on their left wrist and a silver ring on their right ring finger. A semi-transparent teal banner with white text is overlaid across the center of the image.

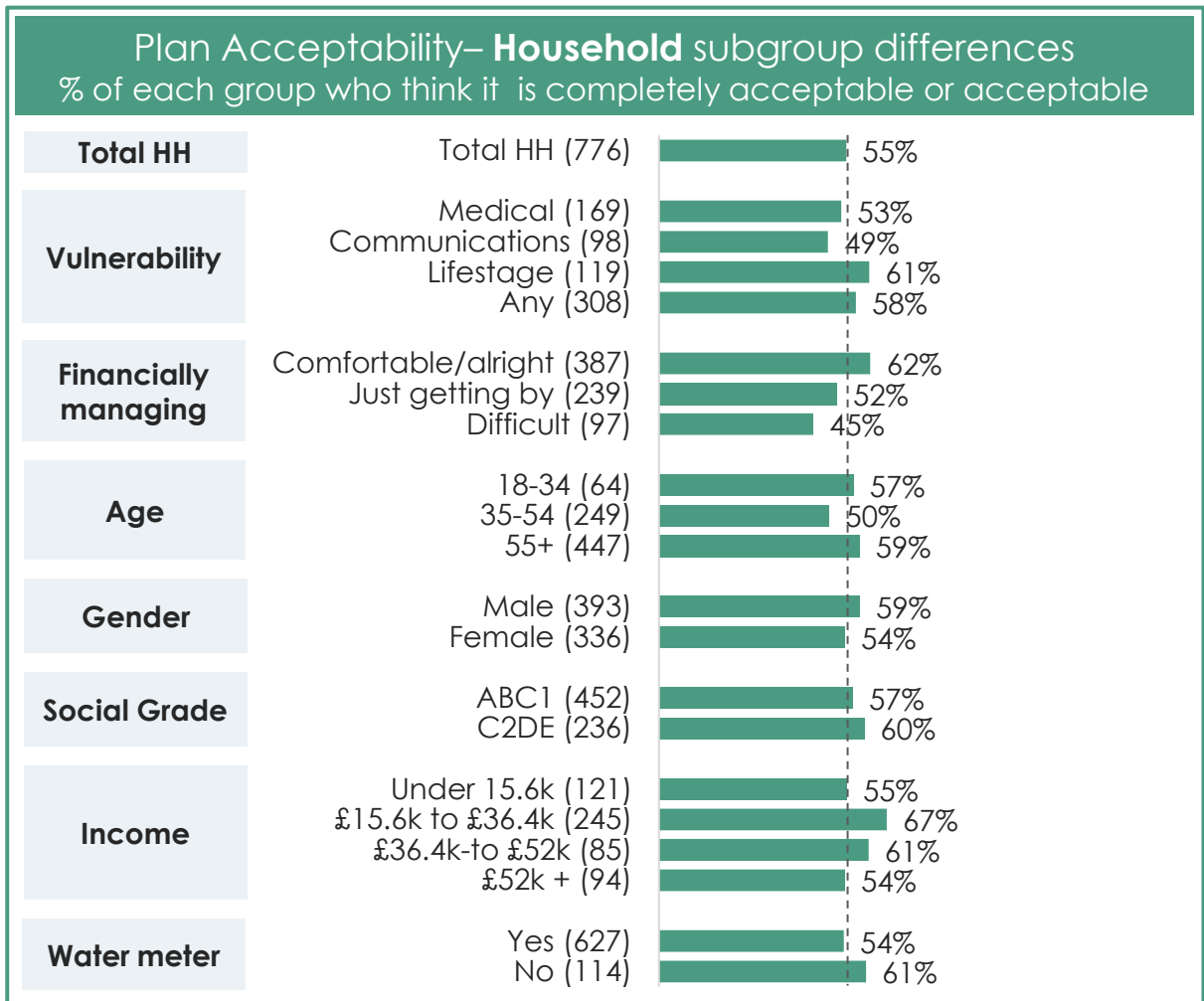
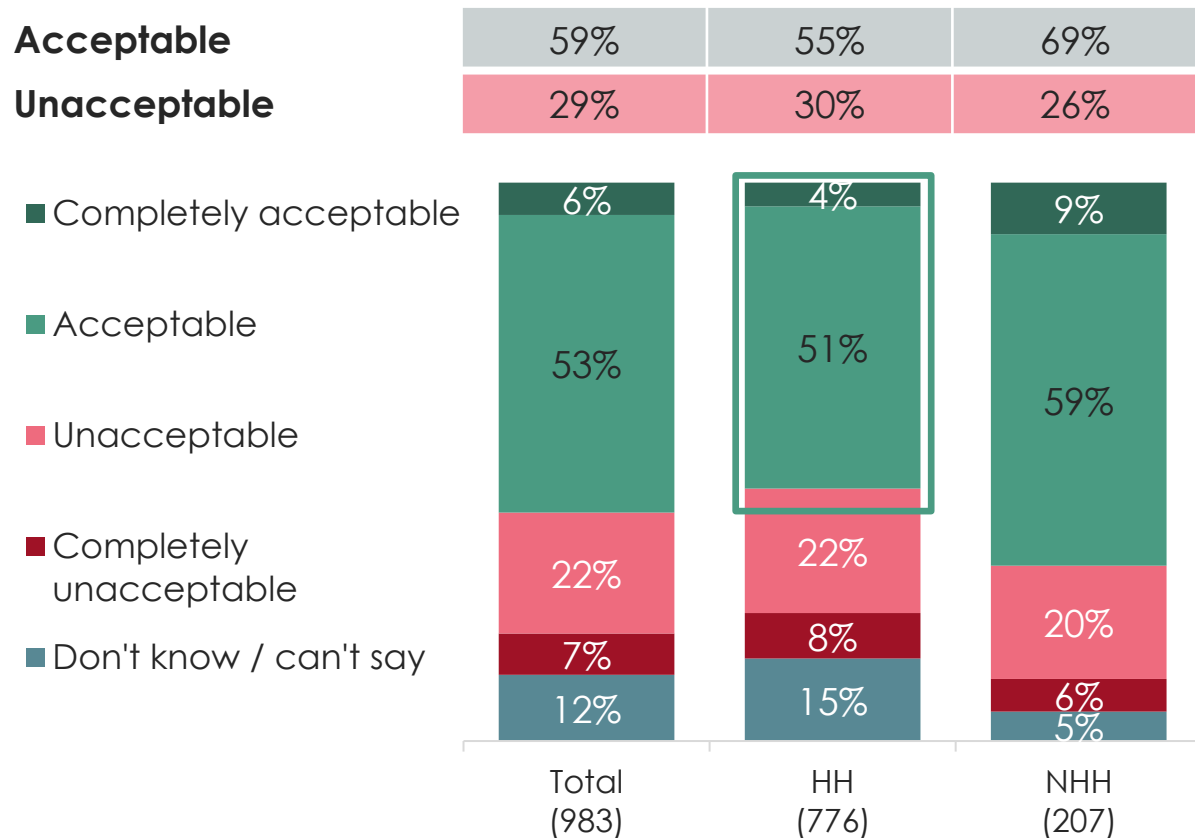
Acceptability of proposed plans

Acceptability of SWW's business plans is 59% overall; but slightly lower (55%) among household 38 customers.

There is not much variation in acceptability by various demographic groups, but those feeling more financially comfortable show higher acceptability; and 35-54 are less likely to deem it acceptable than other age groups.



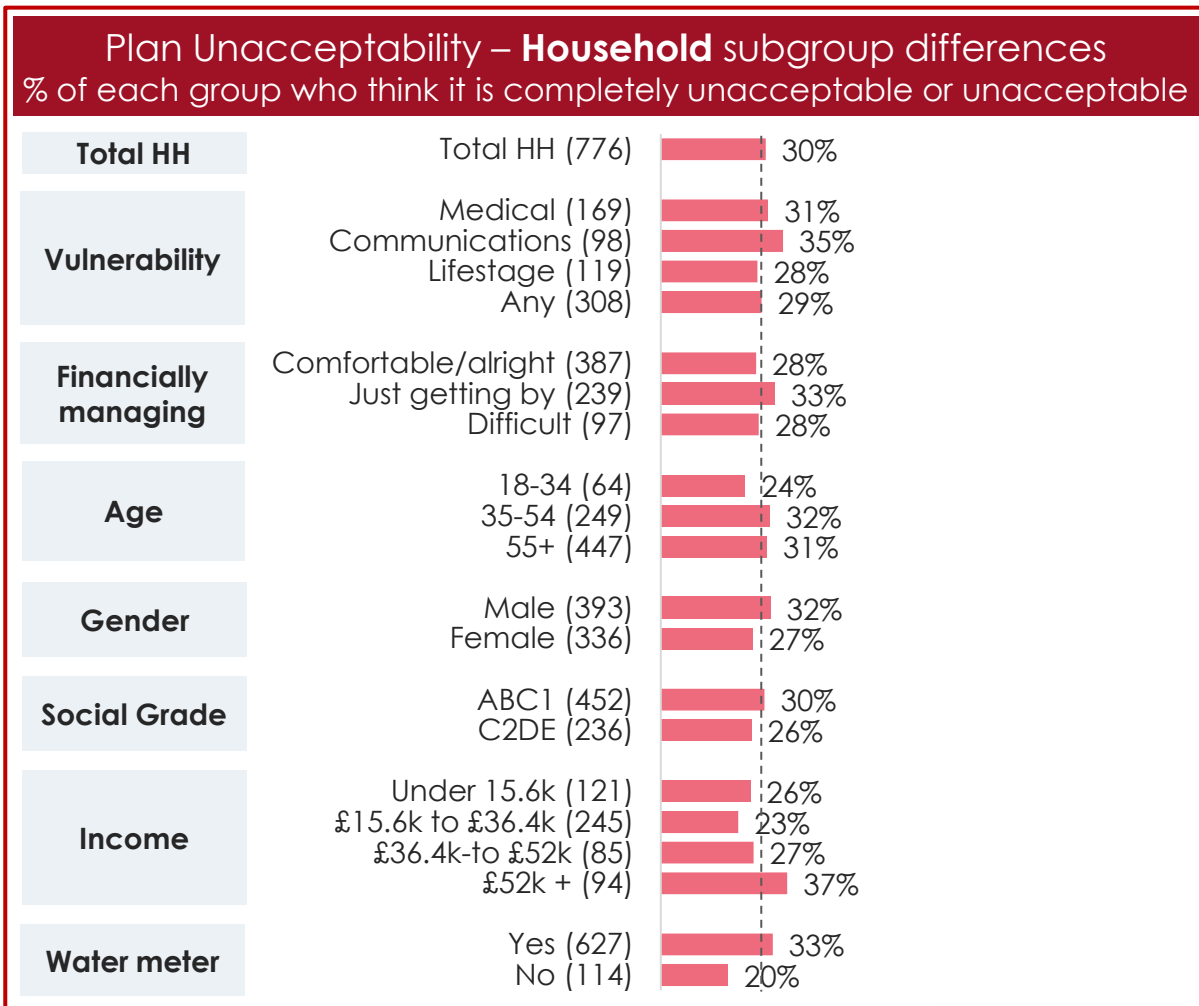
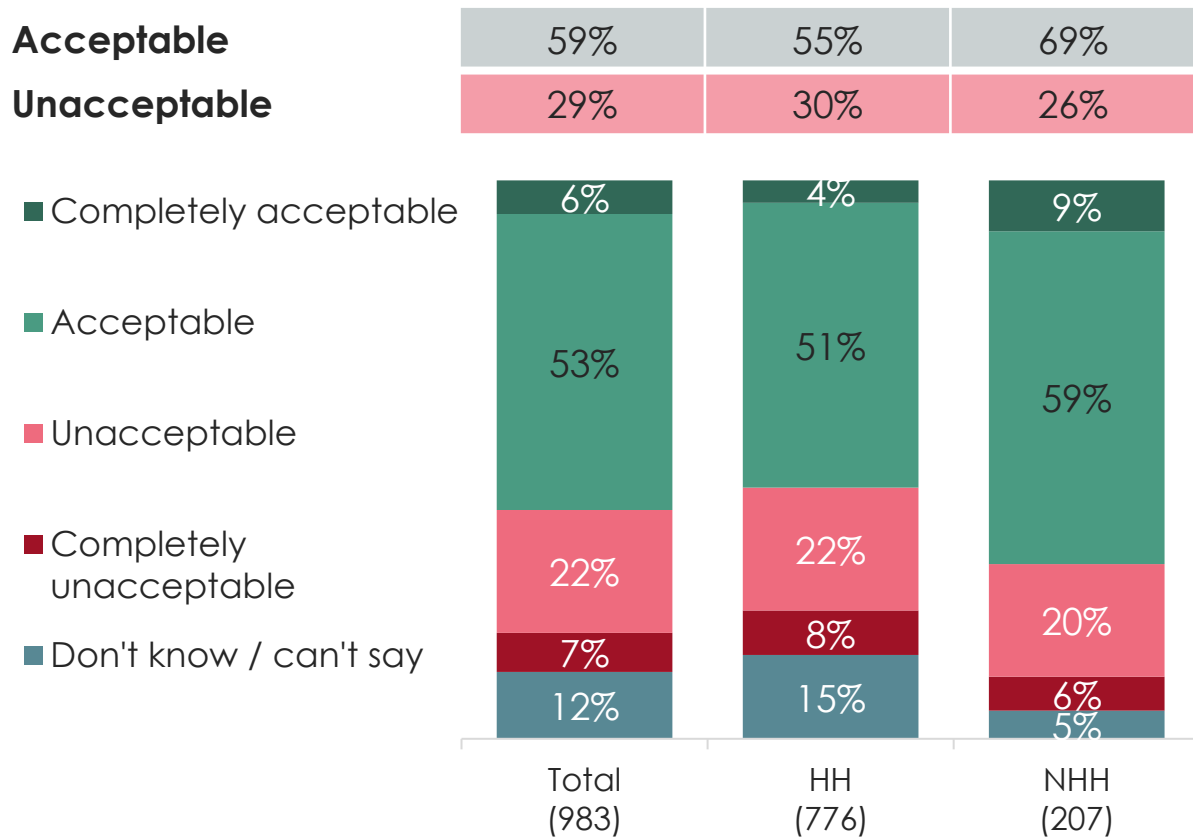
Acceptability of overall plan



Levels of unacceptability are very similar across the subgroups



Acceptability of overall plan



Q8. Based on everything you have seen and read about the proposed business plan, how acceptable or unacceptable is it to you?

Base Household and Non household bill payers: Total (983) **WEIGHTED % FIGURES and UNWEIGHTED BASE SIZES are displayed**

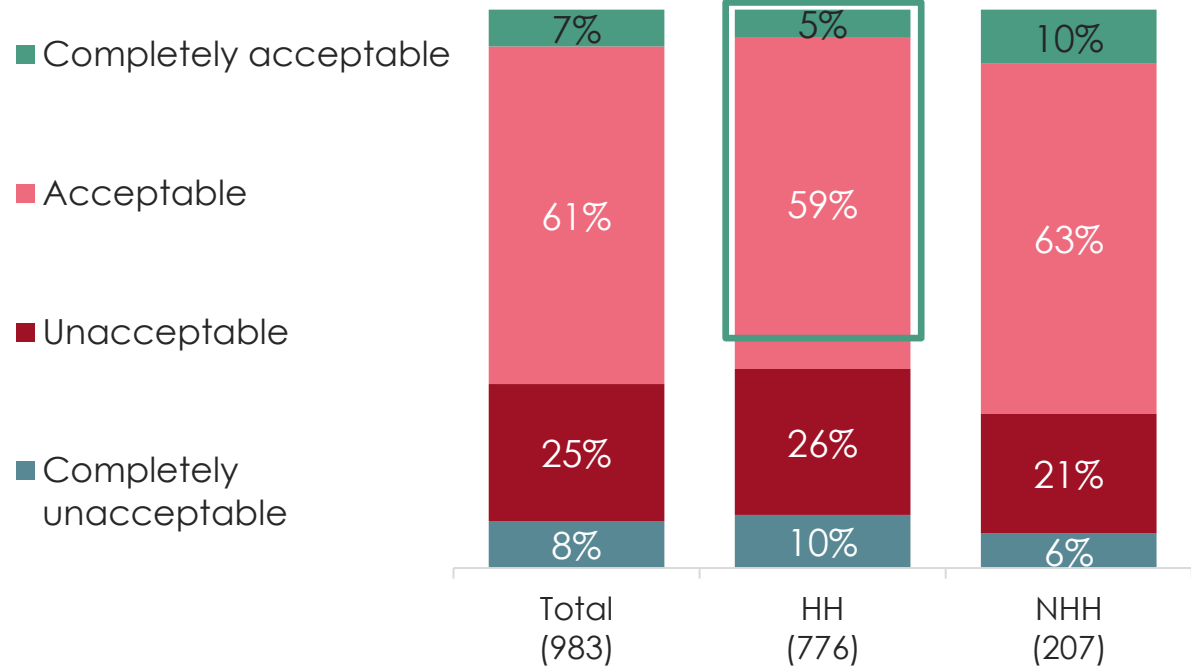
When excluding DK answers, acceptability of SWW's business plans is 67% overall; but slightly lower (64%) among household customers

There is not much variation in acceptability by various demographic groups, but those feeling more financially comfortable show higher acceptability; and 35-54 are less likely to deem it acceptable than other age groups.



Acceptability of overall plan

Acceptable	67%	64%	72%
Unacceptable	33%	36%	27%



Data excluding 'don't know'

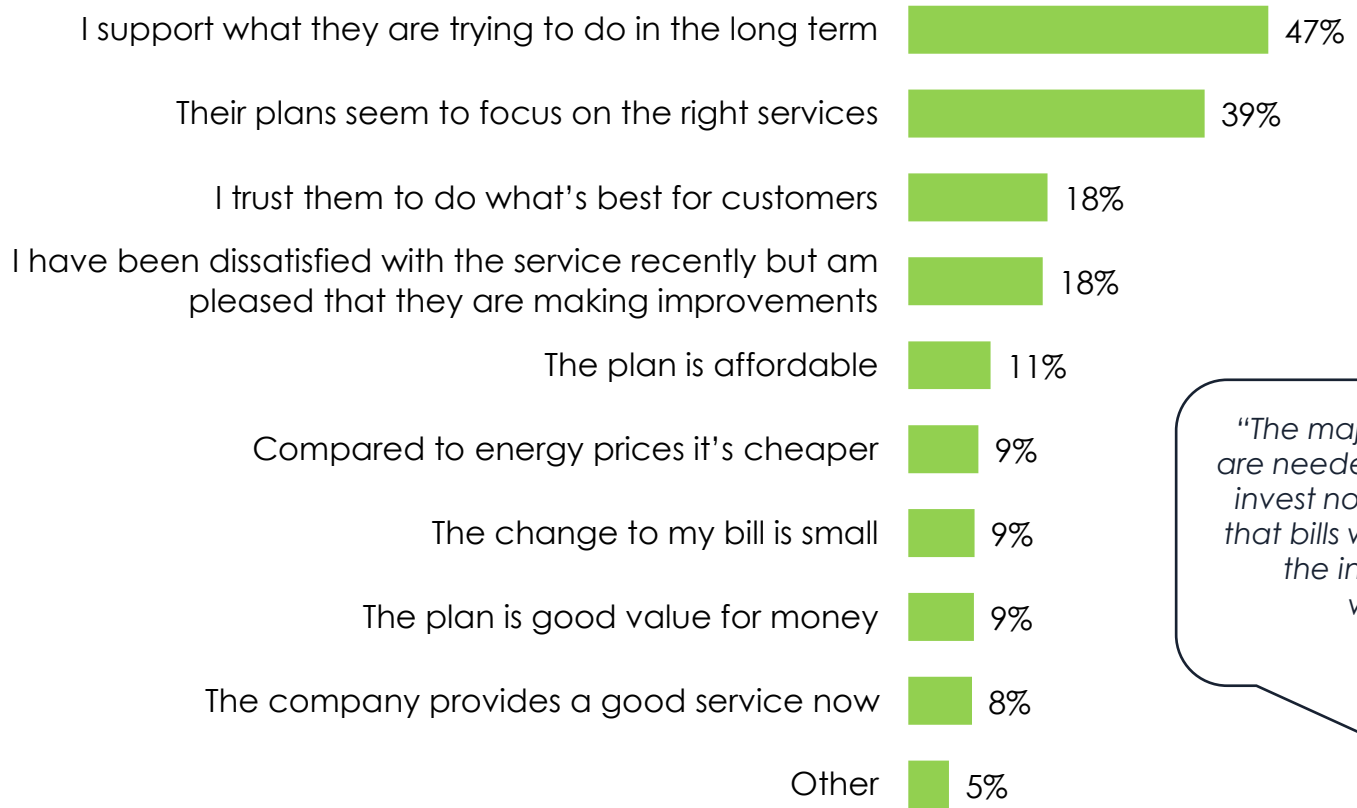
Reasons for accepting the plan were similar to those seen in the qualitative stage

The key reasons why customer endorse the plan is because the they think it focuses on the right things (for the long term), but relatively few choose positive reasons around value for money / affordability



Reasons for accepting the plan

(Household and Non household customers who found the plans acceptable)



*"If we wrote up a list of our 5 essential investments it would match this list pretty well."
HH Truro*

*"The majority of the ideas are needed for the future so invest now, with the hope that bills will go down once the investment has worked?"
HH Truro*

*"I think they are good, but they cost too much."
HH Truro*

A8b. What are the two main reasons that you feel the proposals for your water services are acceptable?
Base Household and Non household bill payers who found the plan acceptable: Total (567)
WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES

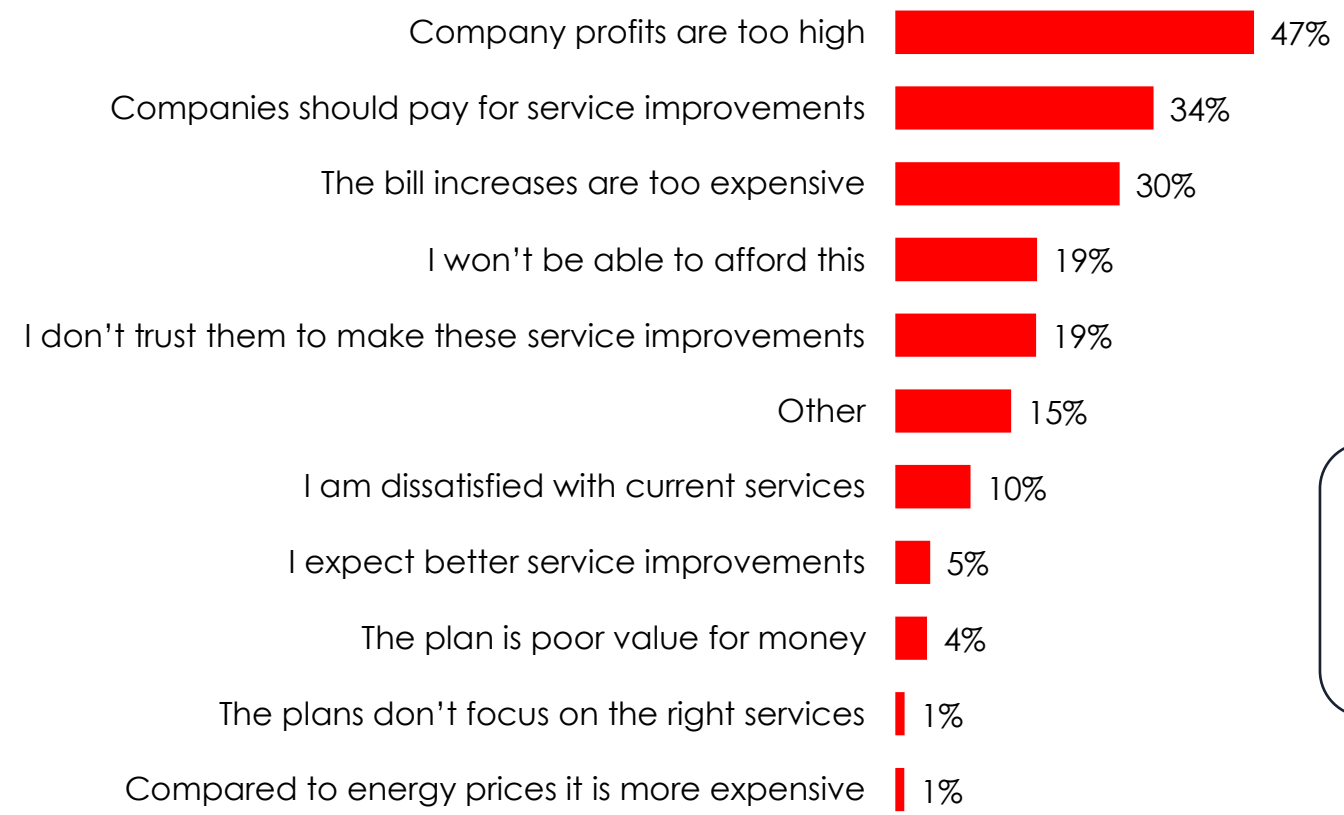
Reasons for not accepting the plan revolve around company profits and cost

The main reason for not accepting the business plan is because customers think water companies' profits are too high, that the companies should pay (more) for improvements, and that the bill increases are too expensive



Reasons for not accepting the plan

(Household and Non household customers who found the plans unacceptable)



*"To what extent can the water company say to government lobby to charge developers?"
HH Barnstaple*

*"I don't think we should be footing the bill."
HH Newquay*







*"Water should be a nationalized. Profiting from a natural resource is obscene
HH Newquay*







A8a. What are the two main reasons that you feel the proposals for your water services are unacceptable?
Base Household and Non household bill payers who found the plan unacceptable: Total (297)
WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES

Acceptability of proposed plan for water supply services

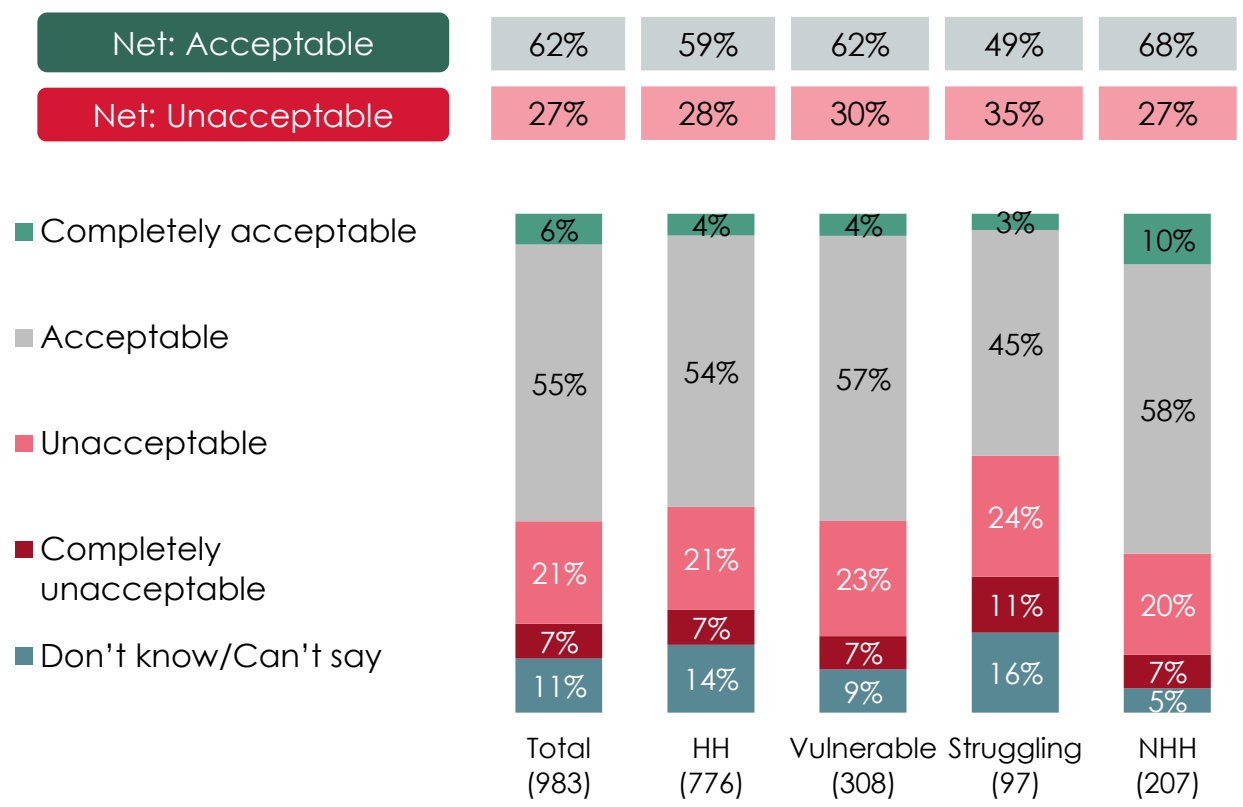
Focusing just on the aspects of the SWW plans for water supply services, acceptability is on equal footing with the overall plan

For detailed stimuli shown to respondents, please see Appendix

South West Water's plan for water services 2025-30		
These are key elements of South West Water's business plan only, and do not make up the full set of activities or costs.		
By 2030...		£/yr
 Maintain target level for supply interruptions from 2025 to 2030		£0
 Reduce leakage from 103 litres per property per day in 2025 to 78 in 2030		£7
 Reduce contacts about tap water quality from 1.3 to 1.1 per 1,000 population		£6
 Increase water supply by the equivalent used by 150,000 people		£17
 Install 350,000 smart water meters		£3
 Improve water quality and reduce risk of lead exposure for over 5,000 homes		£11
£/yr means the added amount on to the average current annual bill (excluding inflation) by 2030		

South West Water's plan for water services 2025-30		
These are key elements of South West Water's business plan only, and do not make up the full set of activities or costs.		
By 2030...		£/yr
 Maintain target level for supply interruptions from 2025 to 2030		£0
 Reduce leakage from 103 litres per property per day in 2025 to 78 in 2030		£9
 Reduce contacts about tap water quality to from 1.3 to 1.1 per 1,000 population		£8
 Increase water supply by the equivalent used by 150,000 people		£24
 Install 350,000 smart water meters		£5
 Improve water quality and reduce risk of lead exposure for over 5,000 homes		£16
£/yr means the added amount based on an example annual bill of £500 today (excluding inflation) by 2030		

How acceptable or unacceptable is the business plan for the water supply services?



Q10a. Based on everything you have seen and read South West Water's proposed business plan for water supply services, how acceptable or unacceptable is it to you? **Base** Household and Non household bill payers: Total (983)

WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES

Acceptability of proposed plan for sewerage services

Focusing on the sewerage services aspects of the SWW plans (which involve more investment), acceptability is lower than for the water only plan.

For detailed stimuli shown to respondents, please see Appendix

South West Water's plan for sewerage services 2025-30

These are **key elements** of South West Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
Continue meeting target for internal sewerage flooding of properties	£4
Reduce outdoor sewer flooding to 14 incidents per 10,000 connections	£6
Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6	£10
Make the company's operations carbon neutral & create new habitats	£6
Reduce the use of storm overflows in 275 locations (<i>legally required</i>)	£55
Improve river/coastal water quality by preventing discharge of excess nutrients (<i>legally required</i>)	£18

£/yr means the **added amount** on to the **average current annual bill** (excluding inflation) by 2030

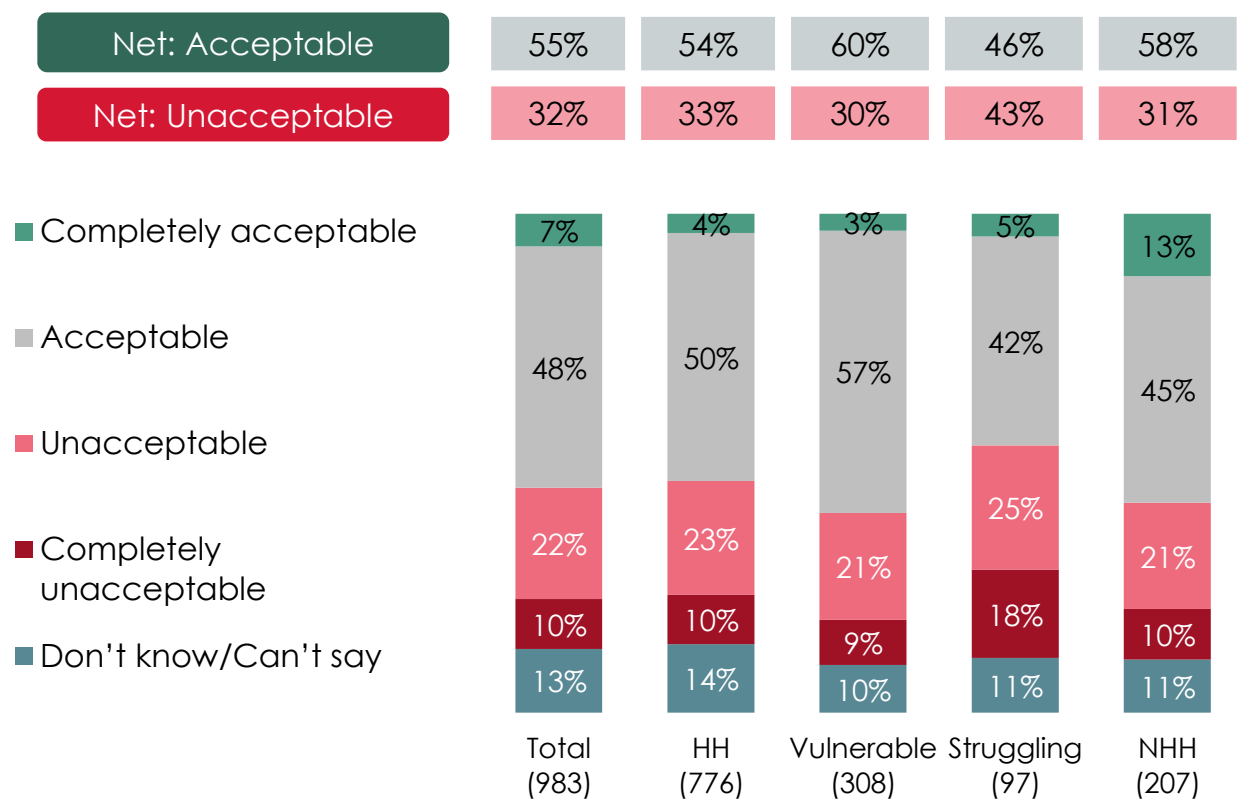
South West Water's plan for sewerage services 2025-30

These are **key elements** of South West Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
Continue meeting target for internal sewerage flooding of properties	£6
Reduce outdoor sewer floods to 14 incidents per 10,000 properties	£9
Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6	£14
Make the company's operations carbon neutral & create new habitats.	£9
Reduce the use of storm overflows in 275 locations (<i>legally required</i>)	£79
Improve river/coastal water quality by preventing discharge of excess nutrients (<i>legally required</i>)	£25

£/yr means the **added amount** based on an **example annual bill of £500** today (excluding inflation) by 2030

How acceptable or unacceptable is the business plan for the sewerage services?



Q10b. Based on everything you have seen and read South West Water's proposed business plan for sewerage services, how acceptable or unacceptable is it to you? **Base** Household and Non household bill payers: Total (983)
 ; **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Bristol Water



**BRISTOL
WATER**

the what we're made of.



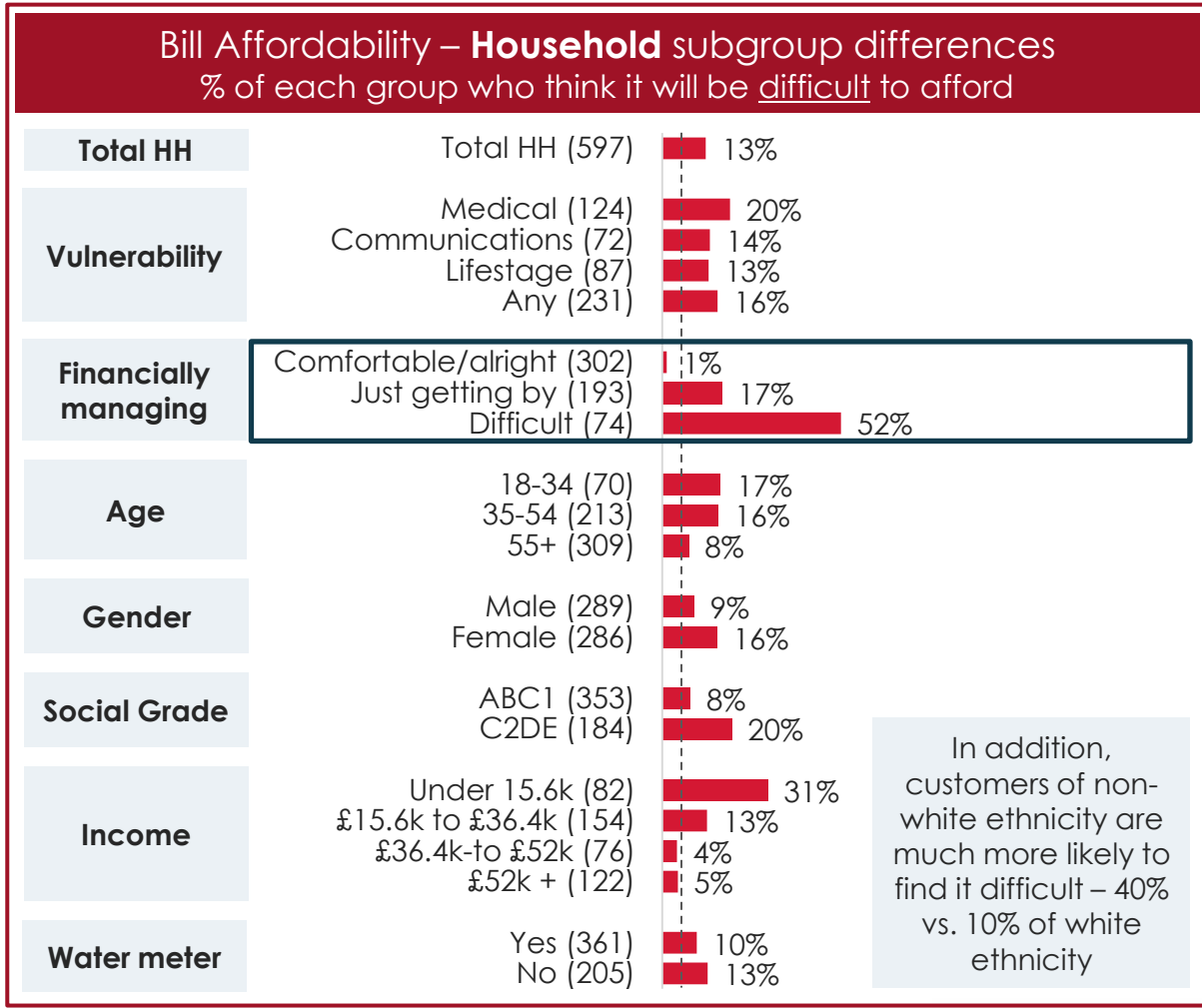
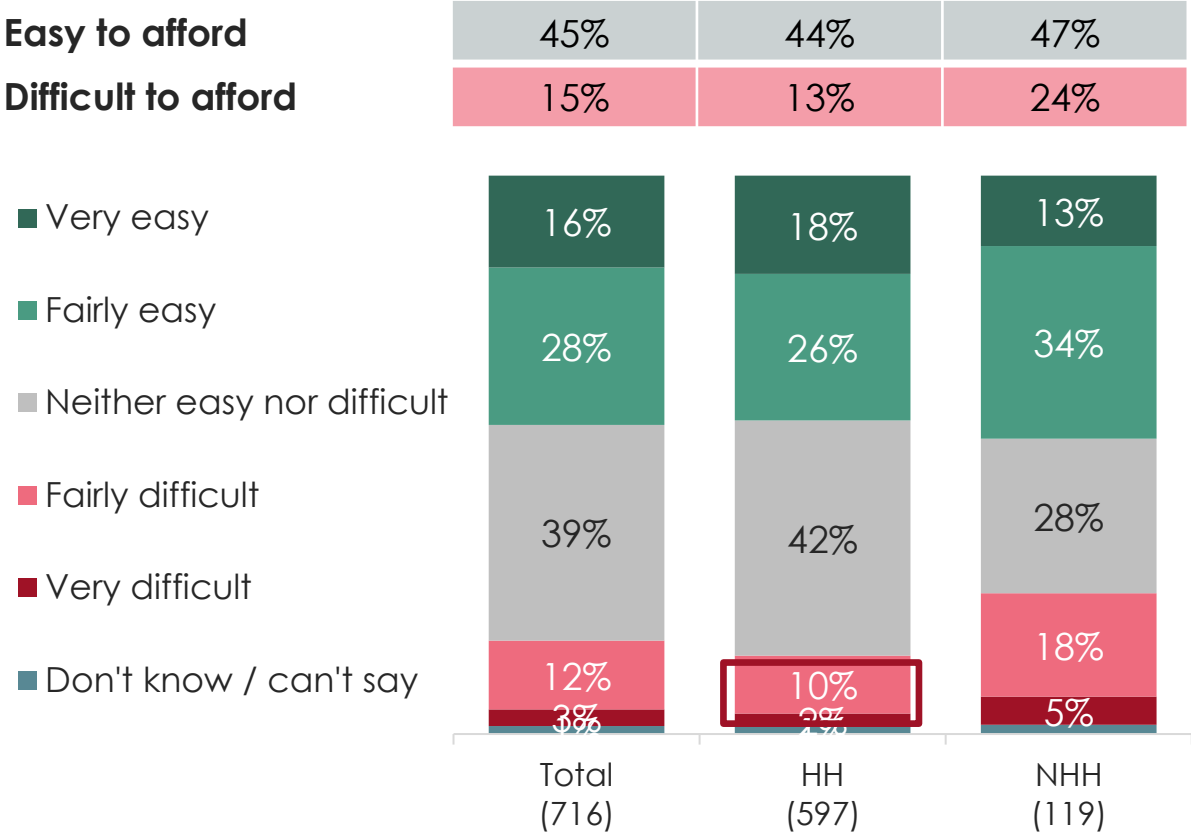
Current bill affordability

Current water and sewerage bill affordability

Almost half currently find their water bill easy to afford. Those who are finding it difficult to manage financially in general are much more likely to be struggling to pay their current water services bill.



How easy or difficult to afford current water & sewerage bill?

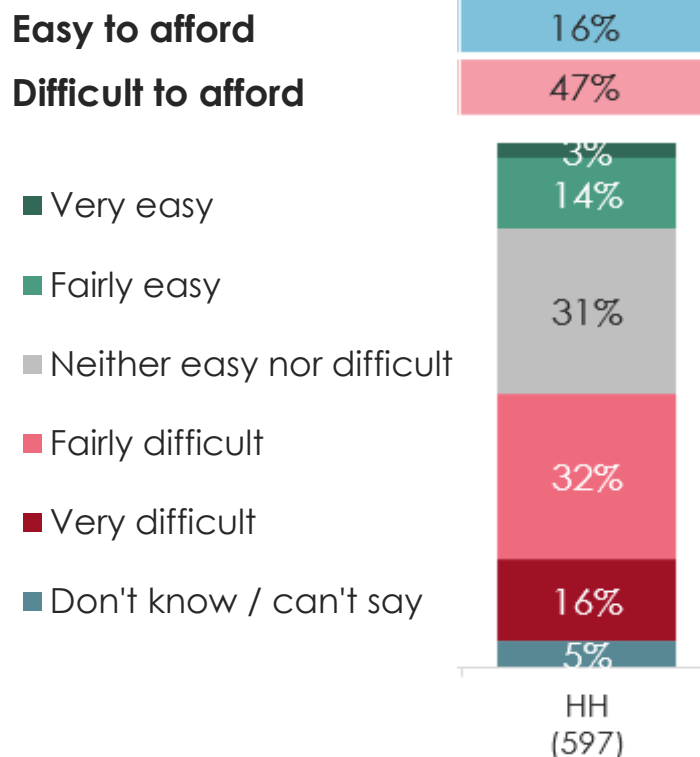


Q4. How easy or difficult is it for you to afford to pay your/your organisation current water and sewerage bill?
Base Total household and non-household bill payers (716)
WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES



How easy or difficult to afford current water and sewerage bill?

Quantitative data



Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill?

Base HOUSEHOLD bill payers (597)



Qualitative insights

- Affordability of customers' current water and sewerage bill in the qualitative research was a similar picture to the quantitative research:
 - A minority (8/30) of household customers found it difficult to pay their current water and sewerage bills
 - However, the most common answer for HH customers is that paying bills is neither easy nor difficult – perhaps reflecting the economic uncertainties people face.
- The current economic climate generates a feeling of unease for customers who are unsure what the future holds for them. Though water bills feel affordable now (or at least are not currently difficult to afford), there are concerns for future rises.
- Qualitative research suggests that bills have an impact on overall spending and are prioritised – customers will cut back or budget where they need to in order to pay them.



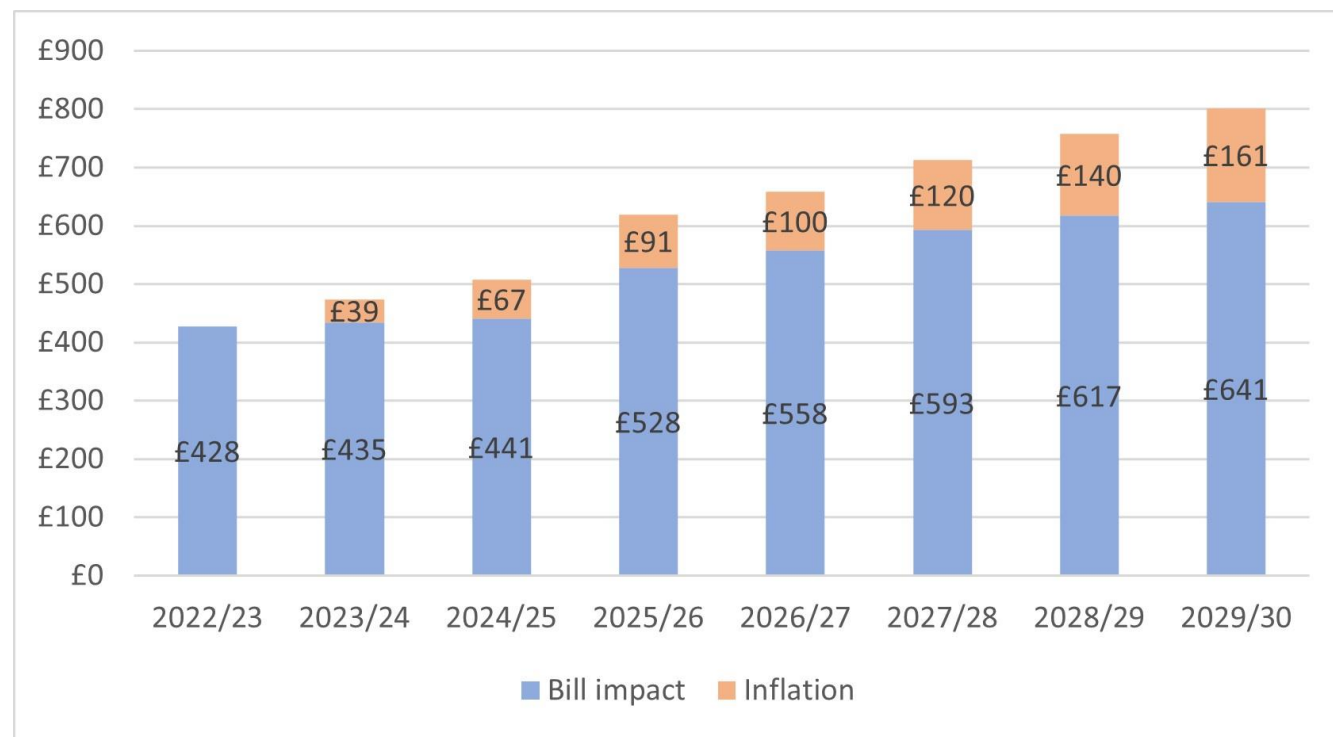
Future bill affordability for business plan

Bill Impact affordability – stimulus shown

Household customers were shown the bill increases for 2022-23 to 2029-30, based on their current annualised bill (and whether or not they are on social tariff, as flagged in the customer sample). Where bill information was not available, a bill profile based on the average annualised bill was shown

Non-household customers were shown the bill increases for 2022-23 to 2029-30, based on a bill of £1000 for 2022-23.

The bill is split into the proposed costs to cover the investments in water and sewerage services needed over the next few years, and predicted inflation (in orange).



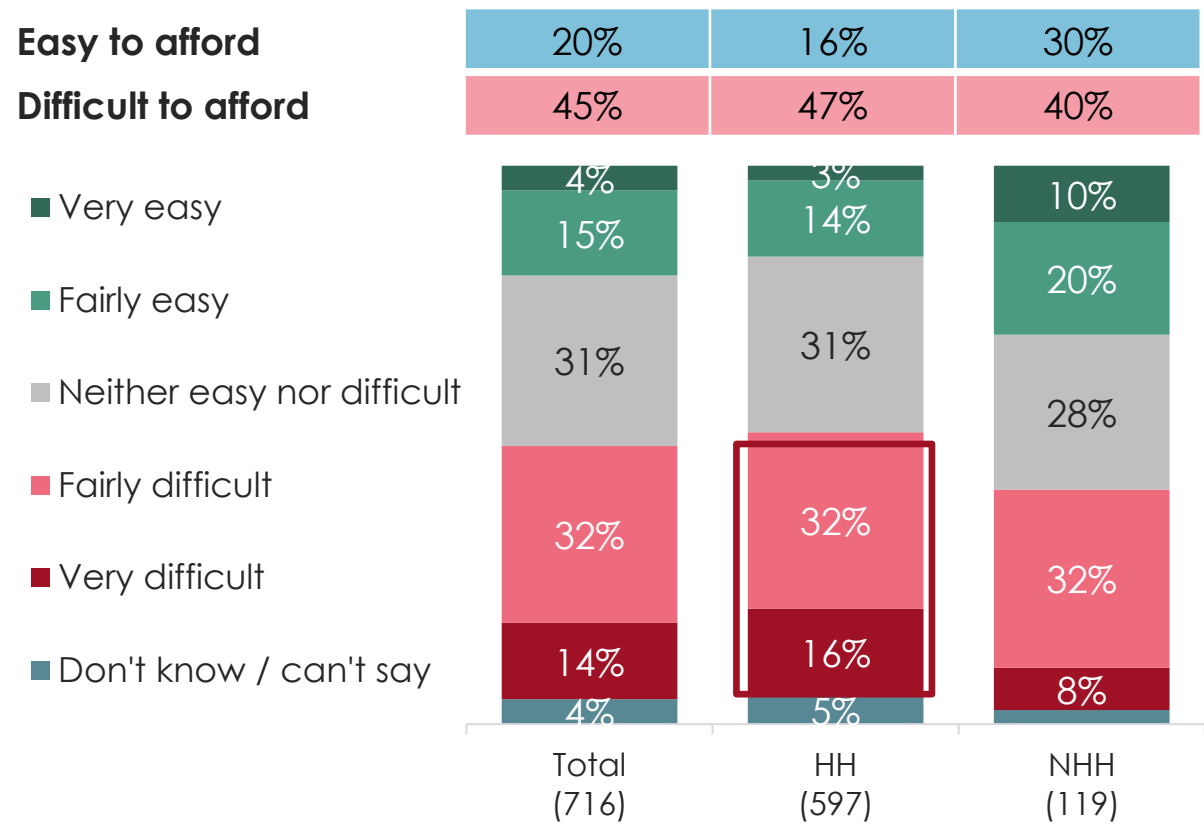
Example personalised bill profile shown

Just under a half anticipate struggling with future water and sewerage bills; NHH customers more confident about their ability to afford it

Lowest income households, lower social grade, and households who do not feel 'comfortable or alright' financially are more worried about being able to afford

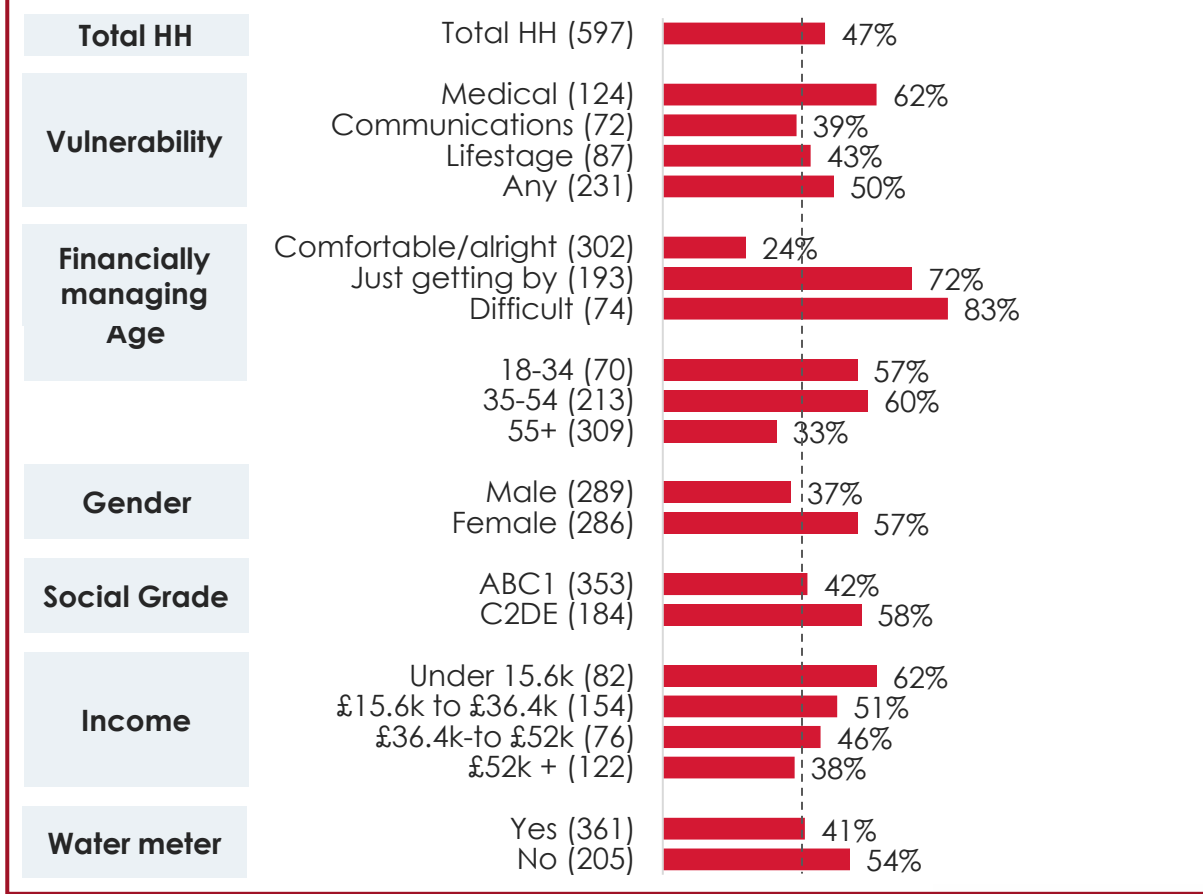


Affordability of water & sewerage bills up to 2029-30



Bill Affordability to 2029-30 – Household subgroup differences

% of each group who think it will be difficult to afford



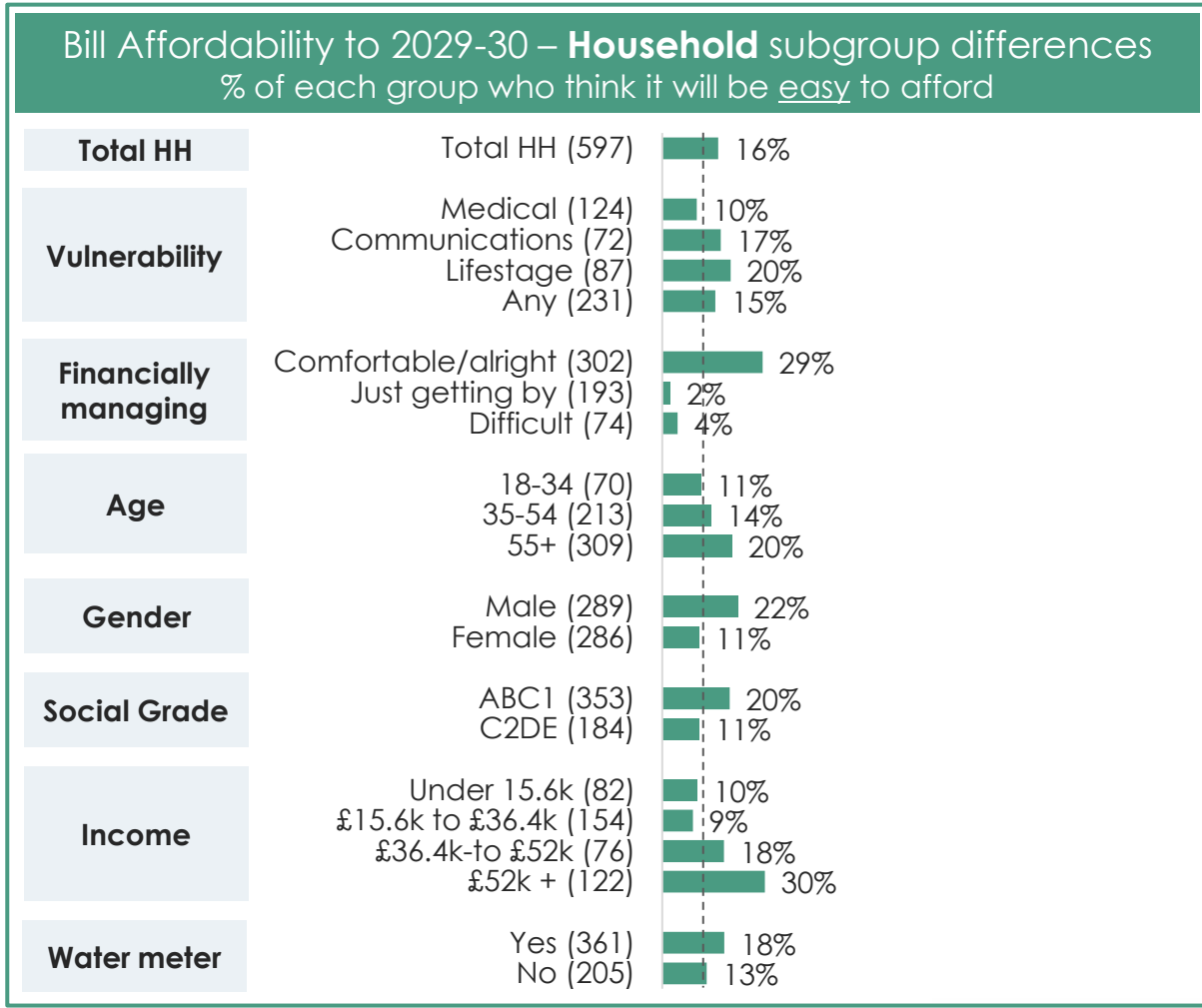
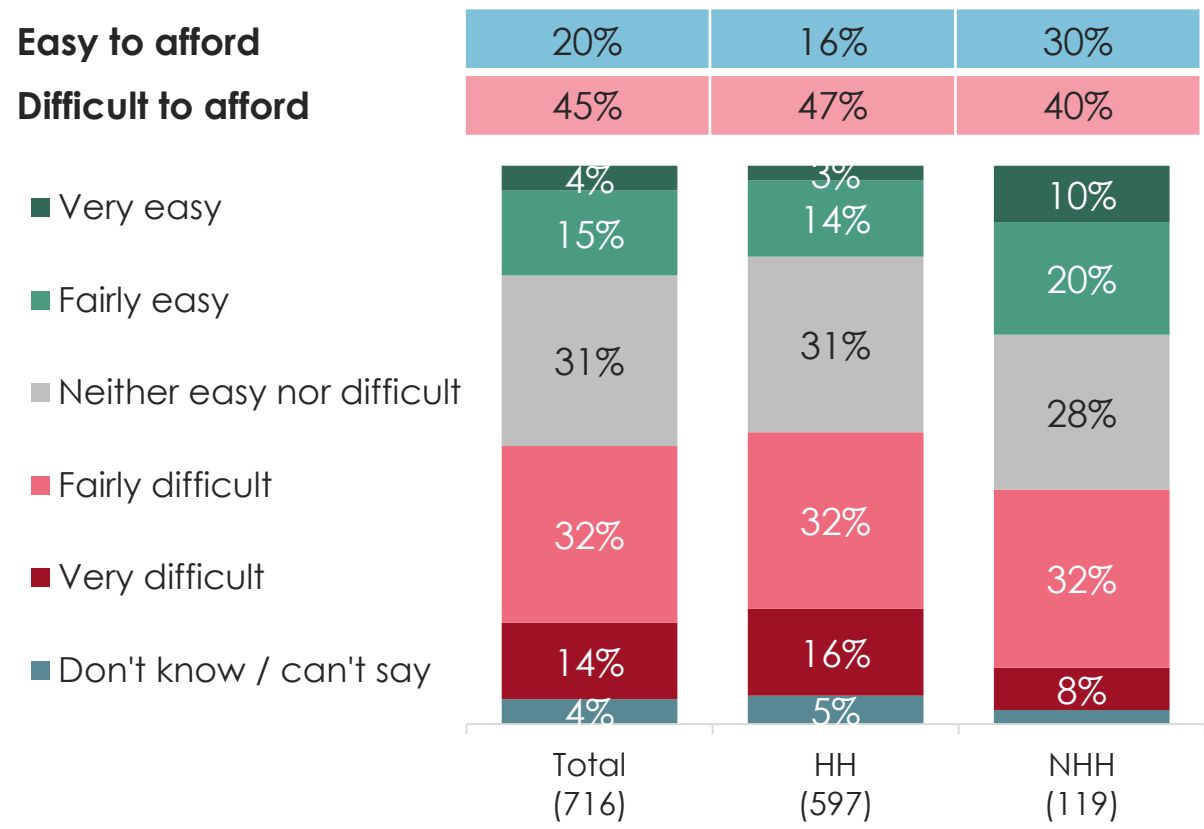
Q5. How easy or difficult do you think it would be for you to afford these water and sewerage bills?
Base Total household and non-household bill payers (716); Total household bill payers (597); Total non-household bill payers (119).
WEIGHTED % FIGURES and UNWEIGHTED BASE SIZES are displayed

3 in 10 NHH customers feel future water and sewerage bills will be easy to afford – fewer HH customers feel this way

Less than a third of financially 'comfortable' customers feel that the proposed bills will be easy to afford (29%) – and almost the same amount of these customers feel the bills would be difficult to afford (24%)



Affordability of water & sewerage bills up to 2029-30

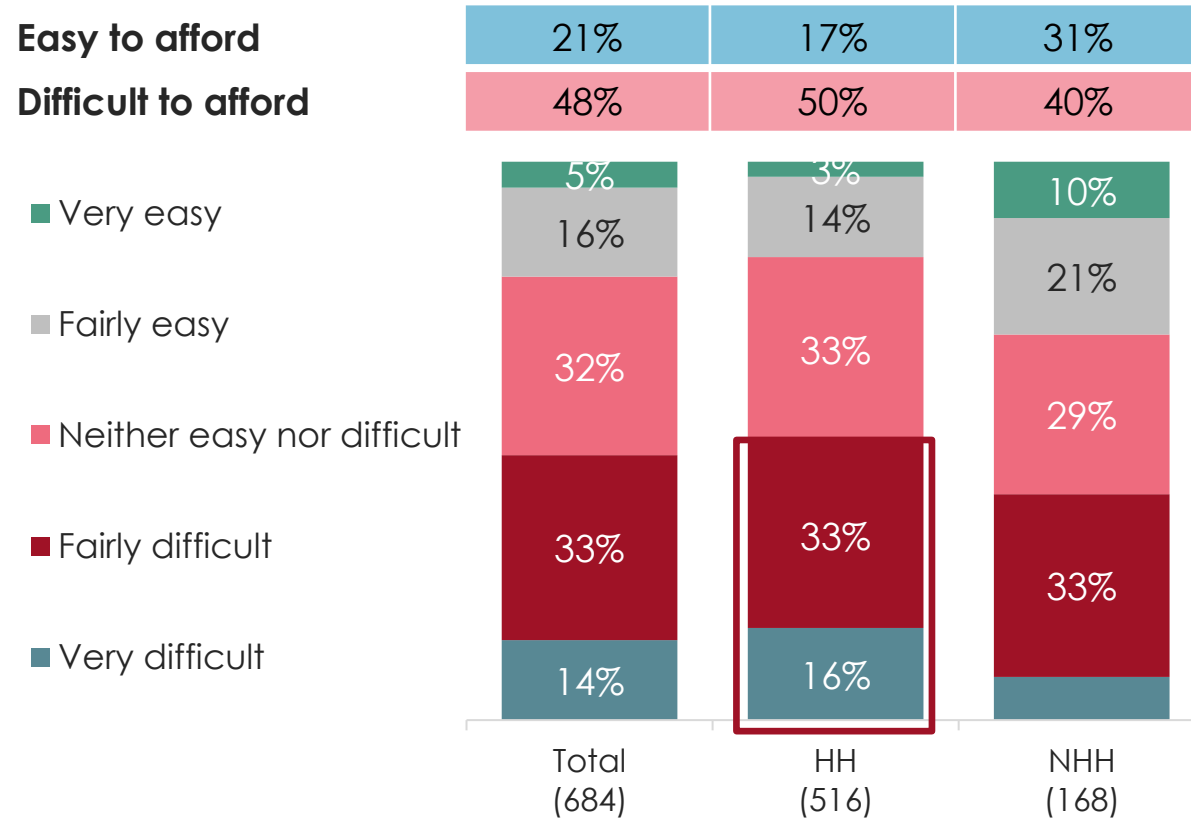


Q5. How easy or difficult do you think it would be for you to afford these water and sewerage bills?
Base Total household and non-household bill payers (716)
WEIGHTED % FIGURES and UNWEIGHTED BASE SIZES are displayed

Just under a half anticipate struggling with future water and sewerage bills; NHH customers more confident about their ability to afford it

Lowest income households, lower social grade, and households who do not feel 'comfortable or alright' financially are more worried about being able to afford

Affordability of water & sewerage bills up to 2029-30



Data excluding 'don't know'

Proposed plan bill affordability – Qualitative context



Affordability of water & sewerage bills up to 2029-30 (Total households)

Easy to afford

16%

Difficult to afford

47%

Very easy

3%

Fairly easy

14%

Neither easy nor difficult

31%

Fairly difficult

32%

Very difficult

16%

Don't know / can't say

5%

HH
(597)

Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills?

Base HOUSEHOLD bill payers (597)



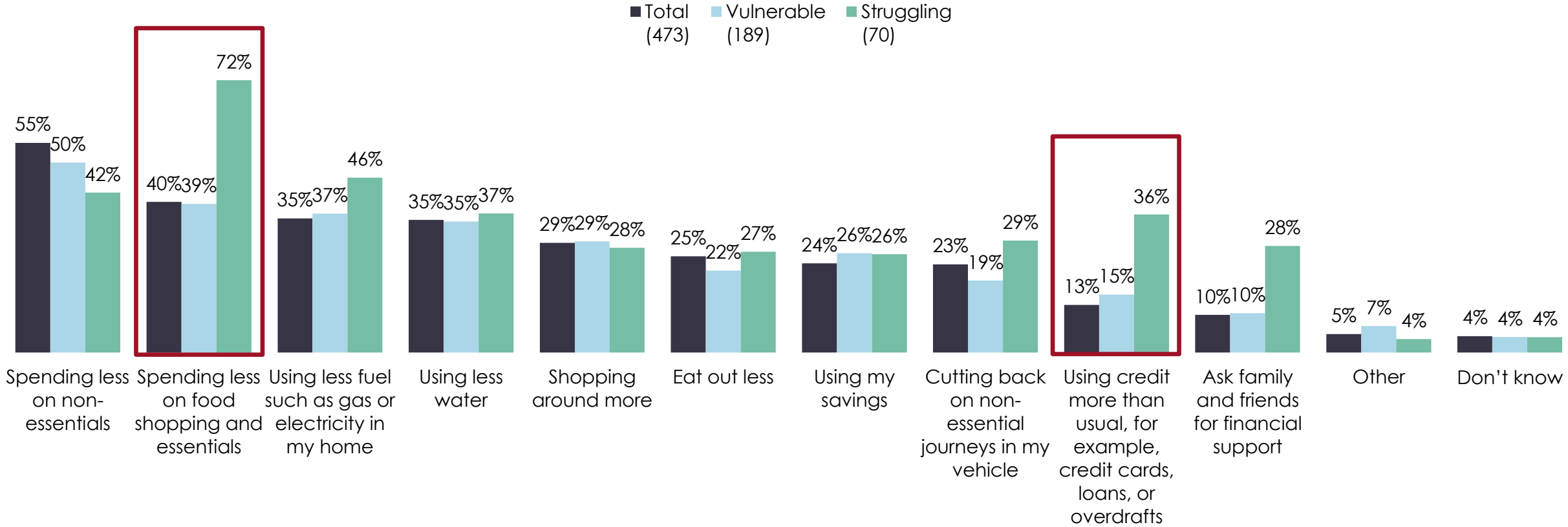
Qualitative insights

- Affordability of the proposed plan in the qualitative research was a very similar picture to the quantitative research:
 - 4/25 of the household sample (BRL supply area) said it would be easy to afford the proposed plan and 10/25 said it would be difficult to afford.
- The qualitative research showed customers were surprised to see both....
 - the **rate** of increase
 - the scale of **inflation**
- The top 4 reasons for rejecting the proposed plan in the qualitative plan referred to finances – customers would like to see water companies pay for the investments from their profits first and foremost, but some also felt the proposed plan was too expensive and poor value for money.

How customers would pay for increased water bills between 2025 and 2030

The majority say they would spend less on non-essentials but also curbing spend on day-to-day essentials like food, gas and water. Those struggling financially much more likely to spend less on essentials, as well as resorting to credit and loans

Which of the following would you need to do to pay for the water bill increases between 2025 and 2030? (Those who say they would struggle to pay the proposed bill from 2025-2030)



Q6. Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?
Base Household bill payers who would not find it easy to pay for the increase in water bills Total households (473); Vulnerable households (189) Struggling households (70). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

A close-up photograph of a person's hands interacting with a silver laptop. One hand is pointing at the screen, while the other is on the trackpad. The person is wearing a black fitness tracker on their left wrist and a silver ring on their right hand. A semi-transparent dark blue horizontal bar is overlaid across the middle of the image, containing the text 'Business plan components' in white. The background is a blurred office setting.

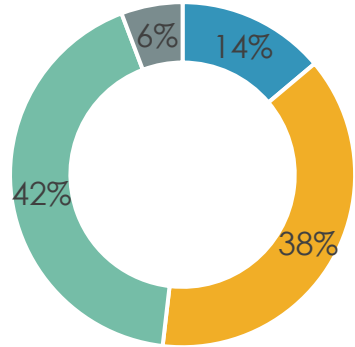
Business plan components

Business plan: Areas of priority – Summary (BRL)

Which of these three parts of the business plan is the most important to you?

Performance Commitments – Water

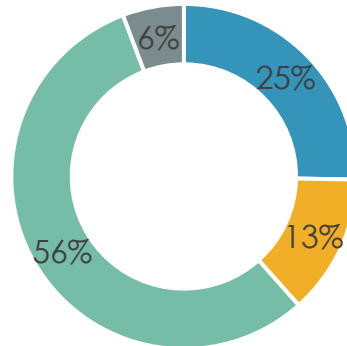
All customers (716)



- Water supply interruptions lasting longer than 3 hours
- Reducing leaks
- The appearance, taste and smell of tap water
- Don't know/Can't say

Additional Plan Components – Water

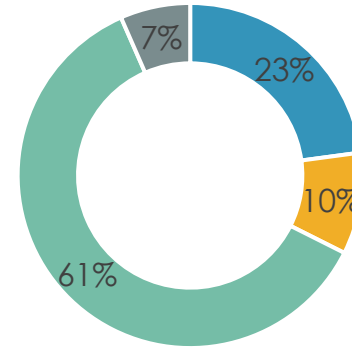
All customers (716)



- Net zero operational emissions and creating new habitats
- Installing smart water meters
- Improving tap water quality through upgrading treatment works and replacing lead pipes
- Don't know/Can't say

Performance Commitments – Sewerage

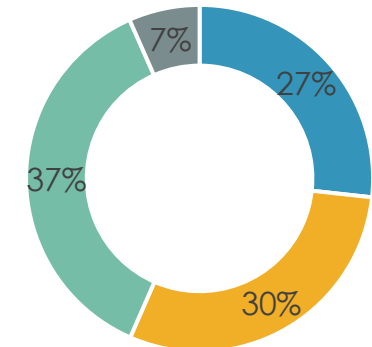
All customers (716)



- Sewage flooding of properties - inside properties
- Sewage flooding of gardens, outbuildings or access points
- Pollution of rivers and bathing waters
- Don't know/Can't say

Additional Plan Components – Sewerage

All customers (716)



- Removing everyone from water poverty
- Preventing excess nitrogen and phosphorous from entering rivers and sea
- Reducing sewage spills
- Don't know/Can't say

Q7. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: Total (716) **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

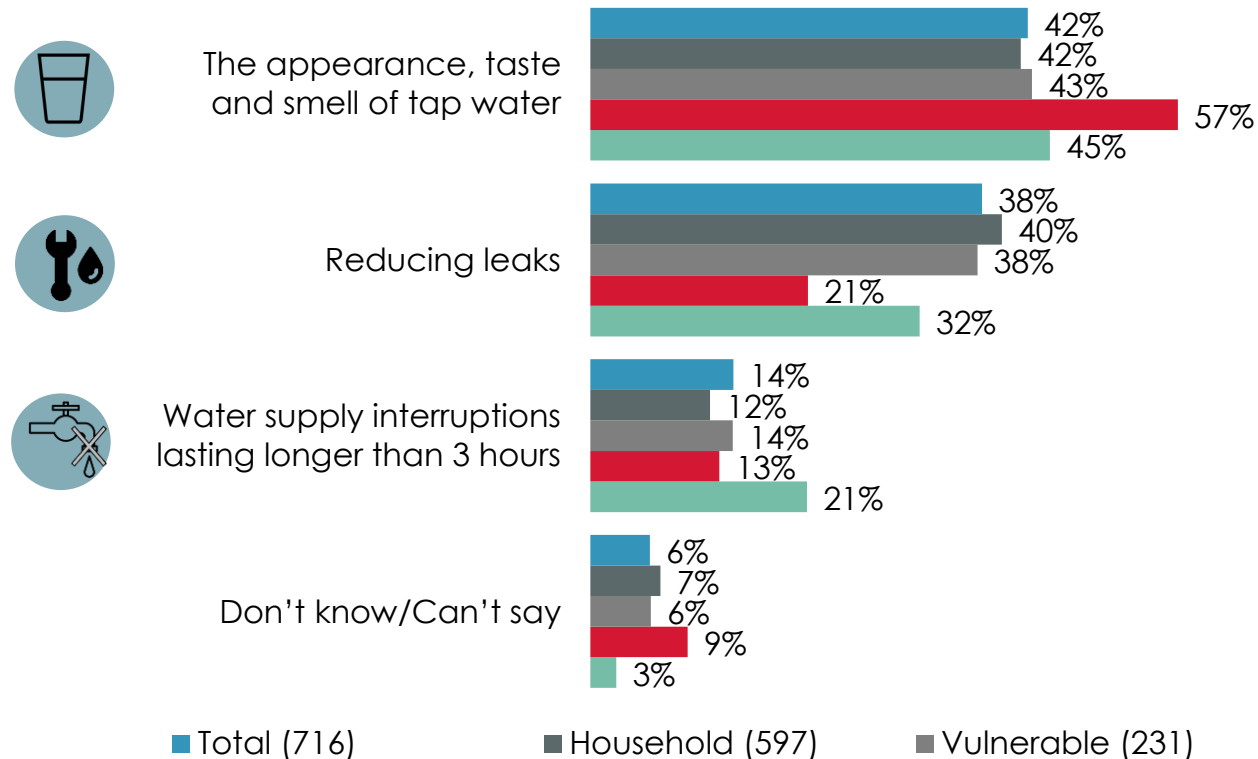
Water Supply Performance Commitments – Importance

The appearance taste and smell of water is voted the most important of the three water performance commitments across all subgroups – but particularly for those financially less well off. Leak reduction follows closely behind

For detailed stimuli shown to respondents, please see Appendix

Which of these three parts of the business plan is the most important to you: Common Performance Commitments (Water)

BRL Customers



■ Total (716) ■ Household (597) ■ Vulnerable (231)
 ■ Struggling to pay (74) ■ NHH (119)

Water supply interruptions, lasting longer than 3 hours

What does this mean? It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected.

How are Bristol Water performing on this? Water companies are measured on the length of time properties are without water. The measure used is the duration without water for more than 3 hours by minutes per property. Bristol Water's performance on this measure is currently 2 mins 31 secs. **Bristol Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030 The duration without water for more than 3 hours by minutes per property stays at, or better than, the current target level (of 5 minutes).

How will they do it? Maintaining 2024/25 performance by

- Repairing water pipes
- Replacing the pipes which cause the most problems.

Cost on bill This will not add anything to your annual bill above what you pay today.

Reducing leaks

What does this mean? Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is seen in the media and has a cost to people on their bills and a cost to the environment.

How are Bristol Water performing on this? Water companies are measured on the amount of water lost due to leaks from water mains. The measure used is annual leakage volume (litres per day). Bristol Water currently stands at 65 litres per day per 1,000 population. **Bristol Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030 Reduce the amount of water lost per property per day in 2030 and so reduce the amount of water that Bristol Water need to treat for the environment.

How will they do it?

- Repairing leaks where they are found
- Replacing old water mains
- Helping customers with leaky pipes.

Cost on bill This will add £5 to the average annual bill (excluding inflation) by 2030.

The appearance, taste and smell of tap water

What does this mean? Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

How are Bristol Water performing on this? Water companies are measured on the number of customer contacts received regarding the appearance, taste and smell of tap water per 1,000 population. Bristol Water currently receives 1.38 contacts regarding incidents per 1,000 population in the area. **Bristol Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030 Reduce the current number of contacts about appearance, taste and smell of tap water from 1.38 to 1.10 per 1,000 population in 2030.

How will they do it?

- Replace cast iron mains which can cause a brown tinge to tap water.

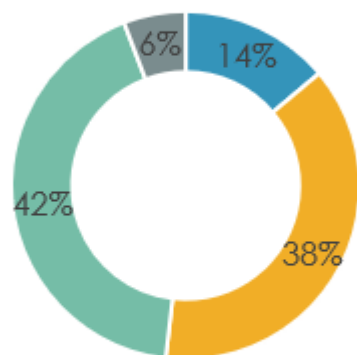
Cost on bill This will add £3 to the average annual bill (excluding inflation) by 2030.

Q7a. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: Total (716). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Performance Commitments – Water

All customers
(716)



- Water supply interruptions lasting longer than 3 hours
- Reducing leaks
- The appearance, taste and smell of tap water
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Reducing leaks:** upon learning of the scale of leakage, many feel the targets here should be more ambitious. Customers anticipate they could benefit if leaks are found on their properties, but question paying more fix leaks on company's side.
- **Appearance, taste and smell of tap water:** an important investment and would prefer to spend their money on contributing to improving the quality of the system rather than buying bottled water.
- **Supply interruptions:** not considered a big problem in the area and fine to see a target that isn't particularly ambitious – any work done should prioritise the worst affected areas.

Additional water supply plan components – Importance

Of the three additional water supply plan components, improving tap water through upgrading treatment works and replacing lead pipes is deemed the most important and by a large margin – this is particularly important amongst customers who are financially struggling

Installing smart water meters

What does this mean? Smart water meters can encourage water saving by increasing customers' awareness of their water use. They can reduce wastage by helping identify leaks, and they make bills fairer, as all customers pay for what they use.

What is the current situation? Just over 64% of households in the Bristol Water region have a basic water meter, very few households have a smart water meter, so it is not possible to see water use in real-time.

What is the plan for this?

Benefit by 2030
Installing smart water meters will help save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also enable new fairer ways to charge customers.

How will they do it?
Bristol Water will install smart meters in 175,000 properties by 2030. Support customers to use less water with water efficiency advice and support.

Cost on bill
This will add £2 to the average annual bill (excluding inflation) by 2030.

Improving tap water quality through upgrading treatment works and replacing lead pipes

What does this mean? Lead pipes still connect some customers' properties to the water mains, meaning there is a risk that traces of lead can get into tap water. There is also a very small risk of microbiological contamination of tap water.

What is the current situation?
Lead pipes on customers' properties (owned by customers) affect 140,000 properties in the region. Currently harmless chemical additives are added into the water supply to prevent any negative impact of lead pipes on health. There is a risk of microbiological contamination of tap water which would result in a 'boil your water' notice.

What is the plan for this?

Benefit by 2030
Reduce risk of lead exposure for at least 10,000 properties between 2025-30, and reduce risk of microbiological contamination of tap water for all.

How will they do it?

- Offer a mix of free and subsidised replacement for lead pipes owned by customers; those on the lowest incomes receive free replacement
- Upgrade water treatment works.

Cost on bill
This will add £10 to the average annual bill (excluding inflation) by 2030.

Net zero operational emissions and creating new habitats

What does this mean? Operational net zero means that, on balance, does not add any greenhouse gases to the atmosphere through operations that we control. Ways of achieving operational net zero include planting trees and restoring peatlands to help create new habitats for wildlife.

What is the current situation? Bristol Water uses electric vehicles to run their sites and pump water. We also use electric vehicles and chemicals to treat water.

What is the plan for this?

Benefit by 2030
Reduce the company's operations carbon footprint by 50% and create 40,000 hectares of new habitats.

How will they do it?

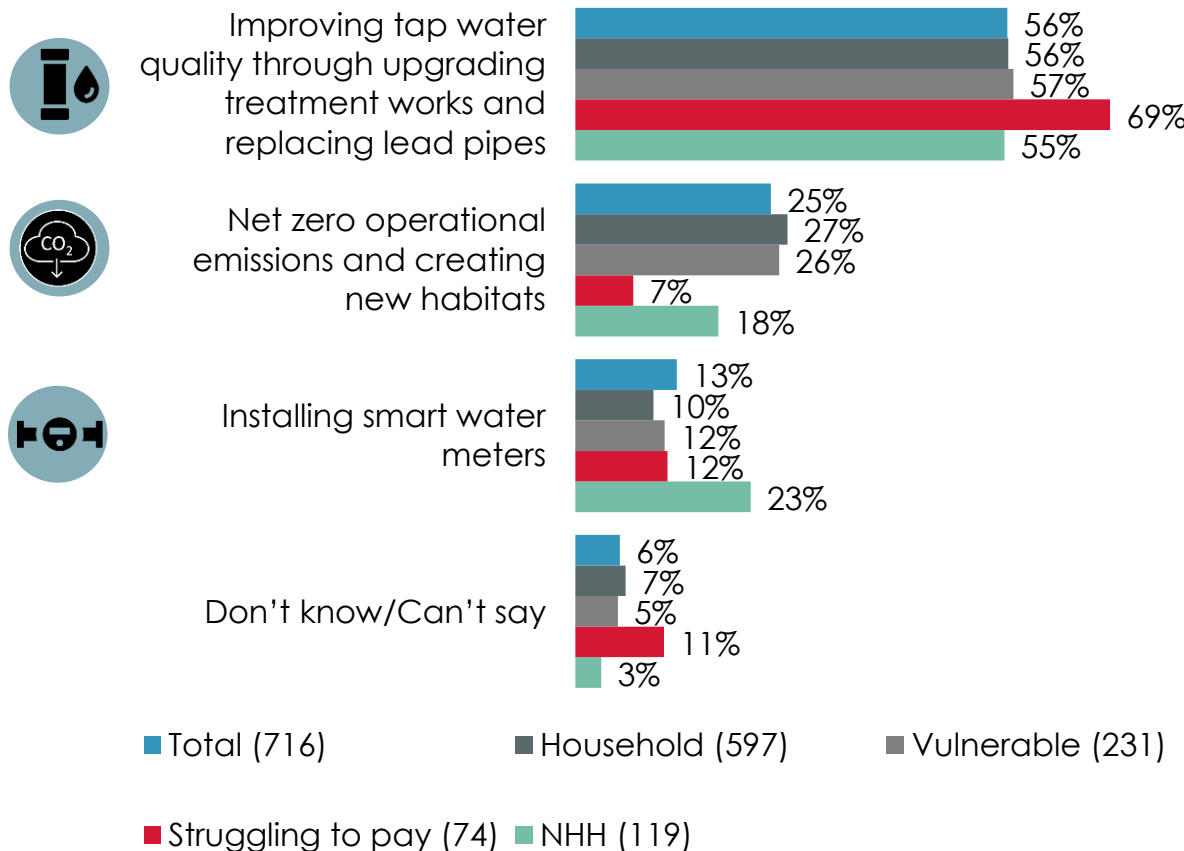
- Moving entirely to electric vehicles
- Develop renewable energy at sites owned by Bristol Water
- Plant 200,000 trees to remove greenhouse gases from the atmosphere
- Peatland and seagrass restoration
- 1,000 'smart' ponds to create new habitats and help reduce flooding.

Cost on bill
This will add £2 to the average annual bill (excluding inflation) by 2030.

For detailed stimuli shown to respondents, please see Appendix

Which of these three parts of the business plan is the most important to you: Additional Plan Components (Water)

BRL Customers



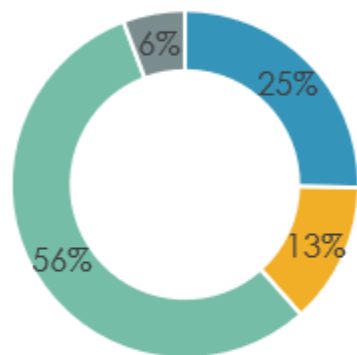
Q7b. Based on what you have just read, which of these three parts of the business plan is the most important to you?

Base Household and Non household bill payers: Total (716). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Additional Plan Components – Water

All customers
(716)



- Net zero operational emissions and creating new habitats
- Installing smart water meters
- Improving tap water quality through upgrading treatment works and replacing lead pipes
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Replacing lead pipes:** customers feel that if it's a health and safety concern, this is a no brainer and investment should go ahead as proposed.
 - Surprised that lead pipes are still in use and upon learning they can affect people and their health, this feels like an important issue to address. However, customers question whether it would be allowed if these health issues were genuine.
- **Becoming operationally net zero:** customers are reluctant to pay for this investment, even if they think it's worthwhile and makes sense that companies are striving for this.
 - The principle is good, but the examples given for how to reach net zero are questionable – is electric vehicle technology well-test enough?
- **Smart meters:** feel like a good step for many, but the urgency and importance of this investment is questioned.
 - Some fail to see the benefits, especially those who are unmetered, and would like to know when the cost of investment will be returned.
 - For most, and even for those who can see the benefits such as savvier water usage, this doesn't feel as important or urgent as other areas for investment.

"It's not for the customer – will they force it on us like smart meters for electricity and gas?"
HH Weston-Super-Mare

Sewerage Performance Commitments – Importance

Addressing pollution issues is the number 1 priority amongst the sewerage performance commitments and this is consistent across the key subgroups.

FOR YOU. FOR LIFE. Sewerage flooding of properties – internal

What does this mean? An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

How are Wessex Water performing on this? Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 1.42 incidents of internal sewer flooding per 10,000 properties.

Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce internal sewer flooding incidents from 1.42 to 1.17 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

FOR YOU. FOR LIFE. Sewerage flooding of properties – external

What does this mean? An escape of sewage into gardens or access points to peoples' properties is inconvenient and unpleasant and can restrict access.

How are Wessex Water performing on this? Water companies are measured on the incidents of sewage flooding gardens or outbuildings. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 19.2 incidents of external sewer flooding per 10,000 properties.

Wessex Water did not meet their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce external sewer flooding from 19.2 to 14.5 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

FOR YOU. FOR LIFE. Pollution of rivers and bathing waters

What does this mean? Discharges from sewage works can affect rivers and bathing waters have a minimal effect on the river or effect depending on the scale.

How are Wessex Water performing on this? Water companies are measured on the number of incidents of pollution in rivers and streams. The measure used is the number of incidents per 10,000 km of sewer. Wessex Water currently have 20.6 pollution incidents per 10,000 km of sewer.

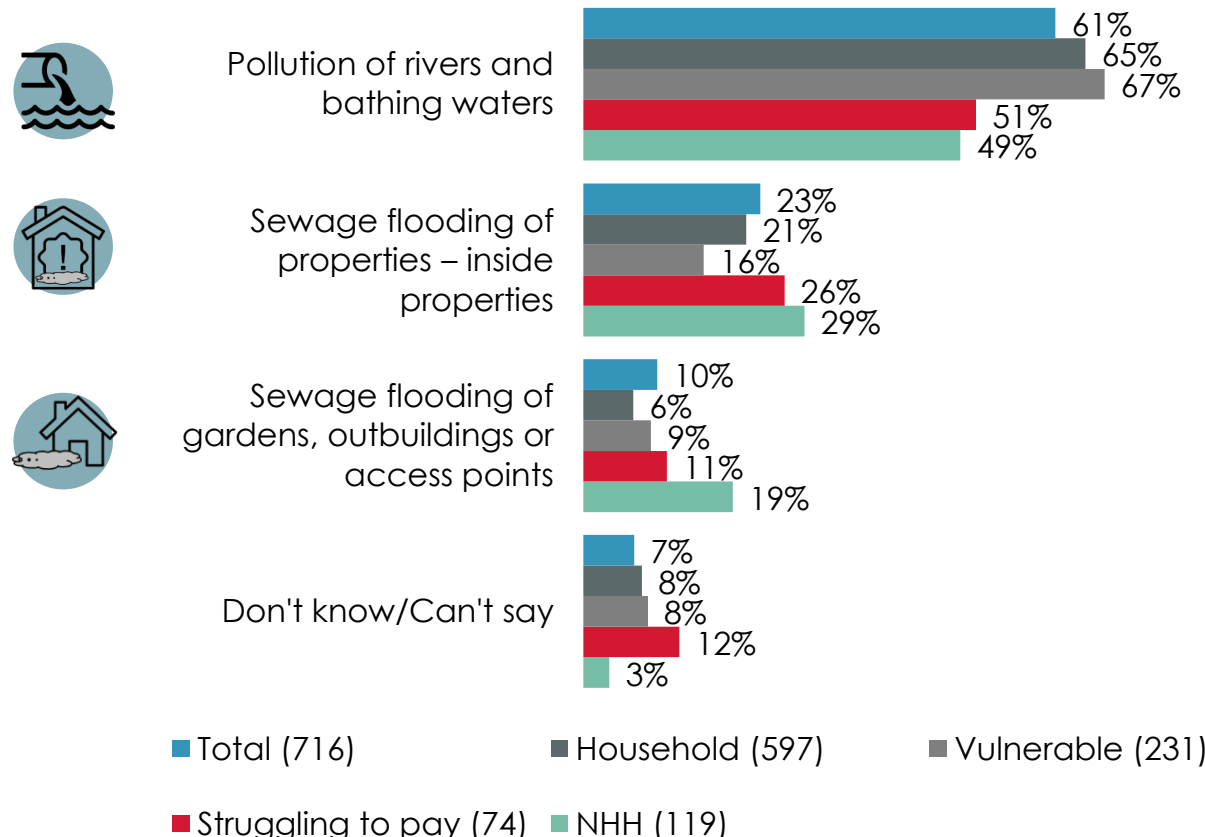
Wessex Water did not meet their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce pollution incidents from 20.6 to 10 incidents per 10,000 km of sewer.
How will they do it?	<ul style="list-style-type: none"> Installing more monitors to predict when incidents might occur Using artificial intelligence to improve their response times Cleaning sewers more often to stop problems before they occur.
Cost on bill	This will add £5 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Common Performance Commitments (Sewerage)

BRL Customers

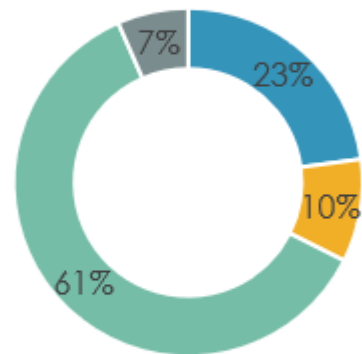


Q7c. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: Total (716). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Performance Commitments – Sewerage

All customers
(716)



- Sewage flooding of properties - inside properties
- Sewage flooding of gardens, outbuildings or access points
- Pollution of rivers and bathing waters
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Pollution of rivers and bathing waters:** definitely considered an important area, but many believe it is the responsibility of the water company and developers to pay for this investment.
- **Internal and External sewer flooding:** general concern around sewer flooding – feels like something that needs to be dealt with and is an important issue.
 - Customers would like to see more ambitious targets in this area, but feel the cost is high for something that is meant to be a basic provision from the water company.

Additional sewerage plan components – Importance

Reducing sewage spills is the most chosen issue to address. Removing everyone from water poverty received the fewest votes, but still over a quarter chose this (and this is particularly important amongst customers who are financially struggling)

FOR YOU. FOR LIFE. Removing everyone from water poverty

What does this mean? Water poverty is when a household spends more than 5% of its disposable income on the water bill.

What is the current situation? Wessex Water have already given financial support to 55,000 households in water poverty. This is known as a 'social tariff' as the support is paid for through other customers' bills. There are likely to be many more households in the region who need help in the future.

What is the plan for this?

Benefit by 2030 Remove everyone from water poverty by 2030, so all customers will be able to afford their bill.

How will they do it?

- Giving financial support to more customers in water poverty - increasing assistance to help around 100,000 households in total
- Continuing to work with partners such as Citizens Advice
- Making it easier to get support, through automatic bill reductions
- Funding community projects.

Cost on bill This will add **£24** to the average annual bill (excluding inflation) by 2030 for all those customers not on a social tariff.

For detailed stimuli shown to respondents, please see Appendix

FOR YOU. FOR LIFE. Preventing excess nitrogen and phosphorous from entering rivers and sea

Legally required

What does this mean? Large parts of the natural environment in the region have been negatively affected by too much nitrogen and phosphorous entering rivers and seas from industry, wastewater and agriculture.

What is the current situation? There is new legislation to ensure the health of rivers and coastal water environments is restored by reducing the levels of nitrogen and phosphorous.

What is the plan for this?

Restore the quality of rivers and coastal waters by preventing 1,500 tonnes of nitrogen and phosphorous from entering rivers and the sea.

- Installing nitrogen and phosphorous removal technology at Wessex Water's treatment works
- Where they can, work in partnership with farmers and landowners to prevent nitrogen and phosphorous getting washed from the land into rivers and the sea
- Creating wetland areas to naturally absorb nitrogen and phosphorous.

FOR YOU. FOR LIFE. Reducing sewage spills

Legally required

What does this mean? When there is too much rain to handle, storm overflows allow sewage to escape into a river or the sea.

What is the current situation? Wessex Water have many storm overflows, which, when they spill, help to reduce the quality of properties being flooded with sewage. Long-term targets have been set by Wessex Water to reduce the use of storm overflows.

What is the plan for this?

Wessex Water will reduce spills at 148 sites, focusing on sensitive sites to reduce the environmental impact.

- Increasing storm water storage at sites
- Working with local communities to reduce the rain water entering the sewers
- Building natural solutions like wetlands to provide a form of treatment before it enters the river.

Cost on bill This will add **£57** to the average annual bill (excluding inflation) by 2030.

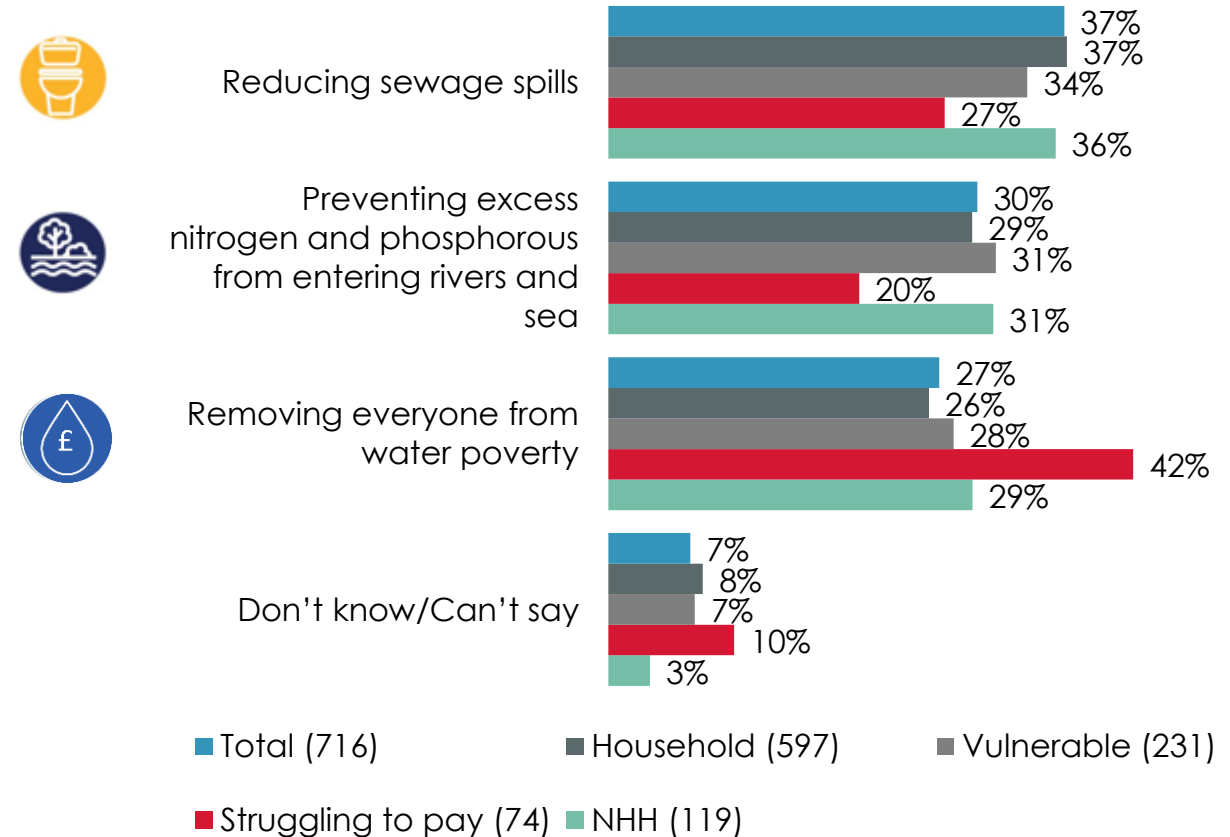
How will they do it?

- Increasing storm water storage at sites
- Working with local communities to reduce the rain water entering the sewers
- Building natural solutions like wetlands to provide a form of treatment before it enters the river.

Cost on bill This will add **£23** to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Additional Plan Components (Sewerage)

BRL Customers

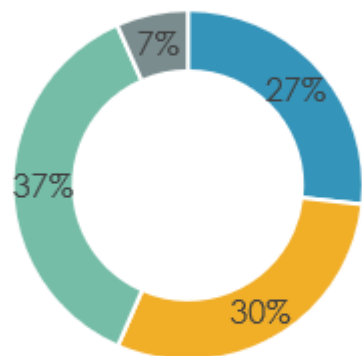


Q7c. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: Total (716). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Additional Plan Components – Sewerage

All customers
(716)



- Removing everyone from water poverty
- Preventing excess nitrogen and phosphorous from entering rivers and sea
- Reducing sewage spills
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- Sewage spills (Legally required):** as an area of high importance for customers, there is support to extend this investment beyond the legal requirement.

 - All information pertaining to sewage spills and pollution is regarded as important and the investment is worthwhile.
 - Customers want to see a strategy that prioritises the worst affected rather than areas that area easiest to fix.
- Nutrient removal (Legally required):** customers would like to see this issue dealt with in a permanent way (rather than put off, as in the minimum requirement plan).

 - The current plan feels unclear and seems strange and irresponsible to invest millions in something that may not work.
 - Customers want to see this dealt with via a more cohesive approach across the UK.
- Water poverty:** Important that those who are struggling get support, but many customers feel this should not be cross-subsidy funded.

 - This may be due to a lack of understanding around how exactly the cross subsidy works but also a potential lack of support. The cost of living crisis may be an explanation for this.

A close-up photograph of a person's hands interacting with a silver laptop. The left hand is pointing at the screen, while the right hand is on the trackpad. The person is wearing a black fitness tracker on their left wrist and a silver ring on their right hand. A semi-transparent dark blue horizontal bar is overlaid across the middle of the image, containing the text "Acceptability of proposed plans" in white. The background is a blurred office setting.

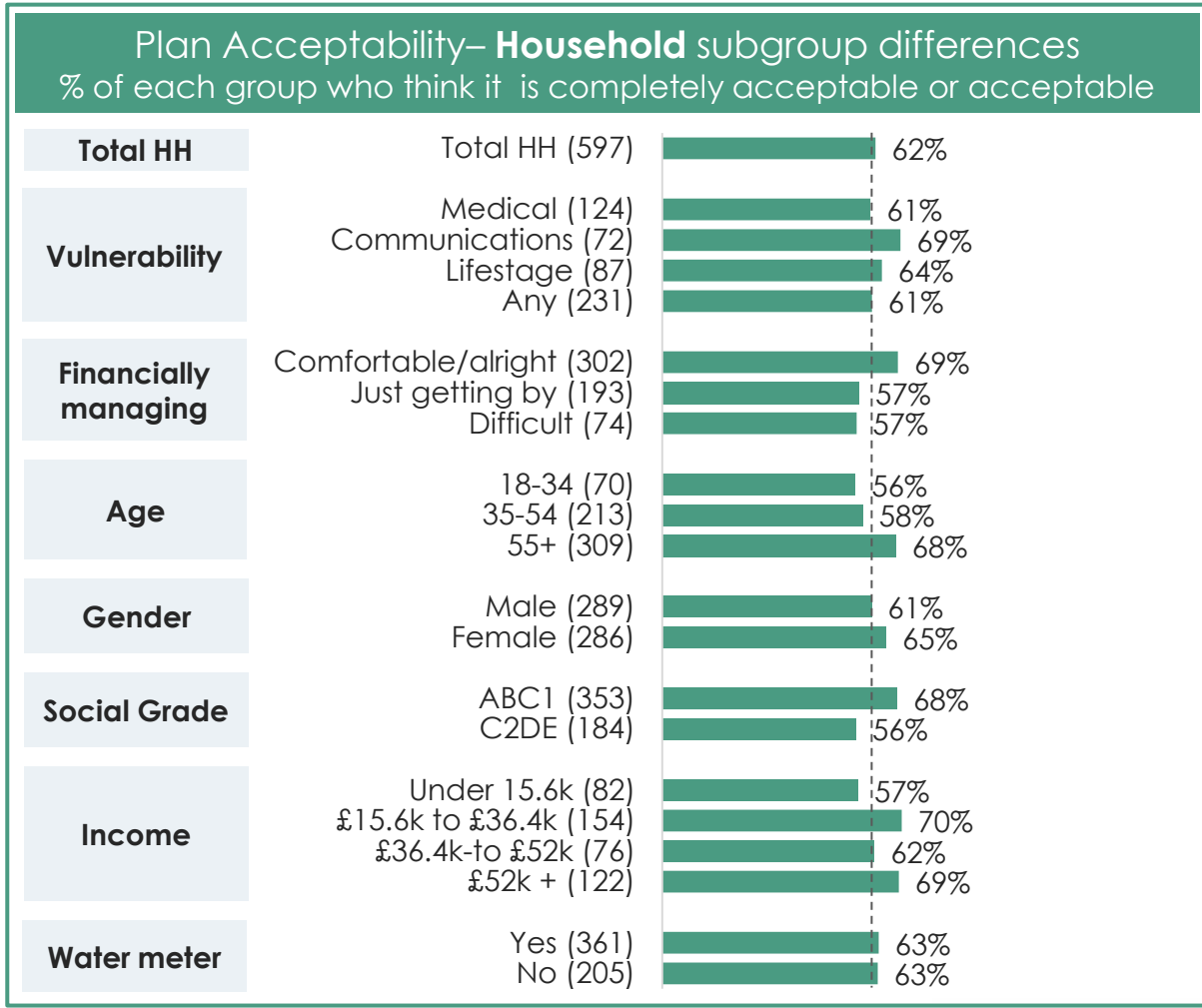
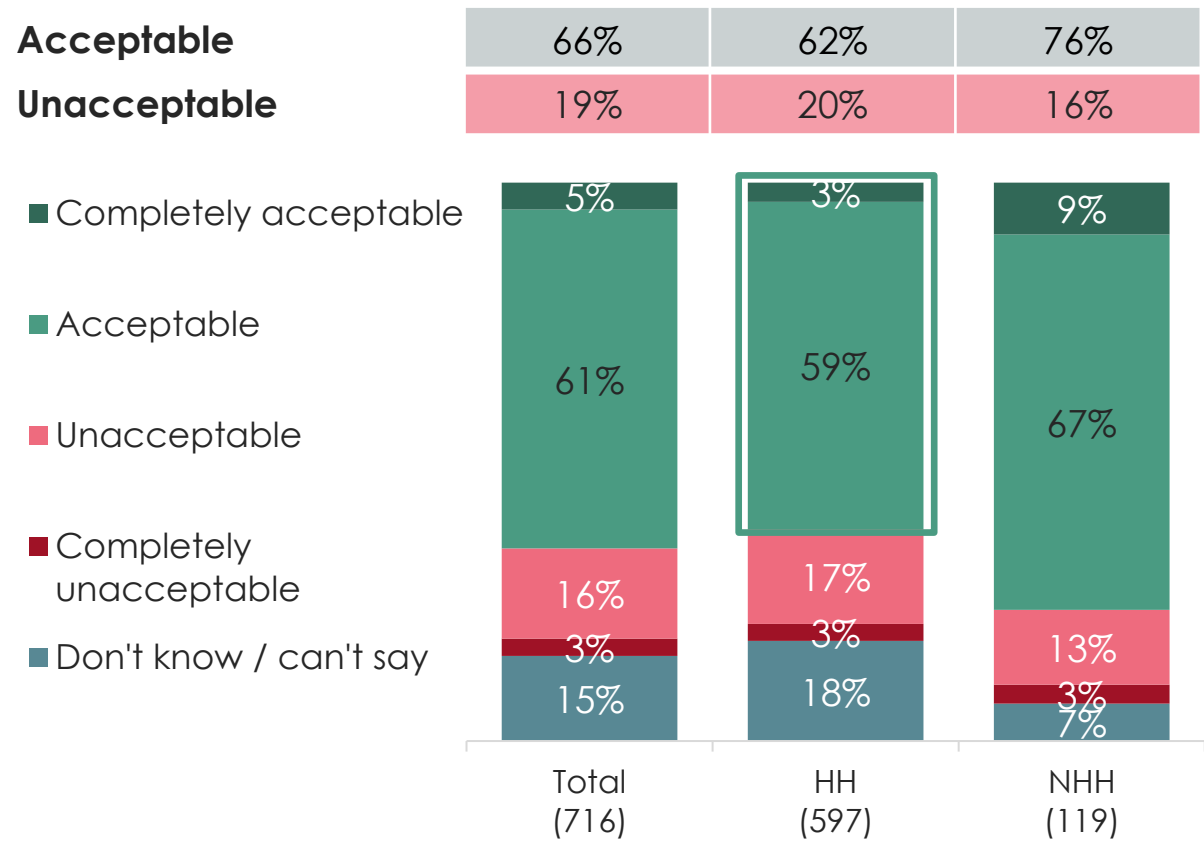
Acceptability of proposed plans

Acceptability of BRL's business plans is 66% overall; it is higher amongst NHH customers (76%) than HH customers (76%)

Levels of acceptability is generally quite stable amongst the different HH subgroups



Acceptability of the overall plan

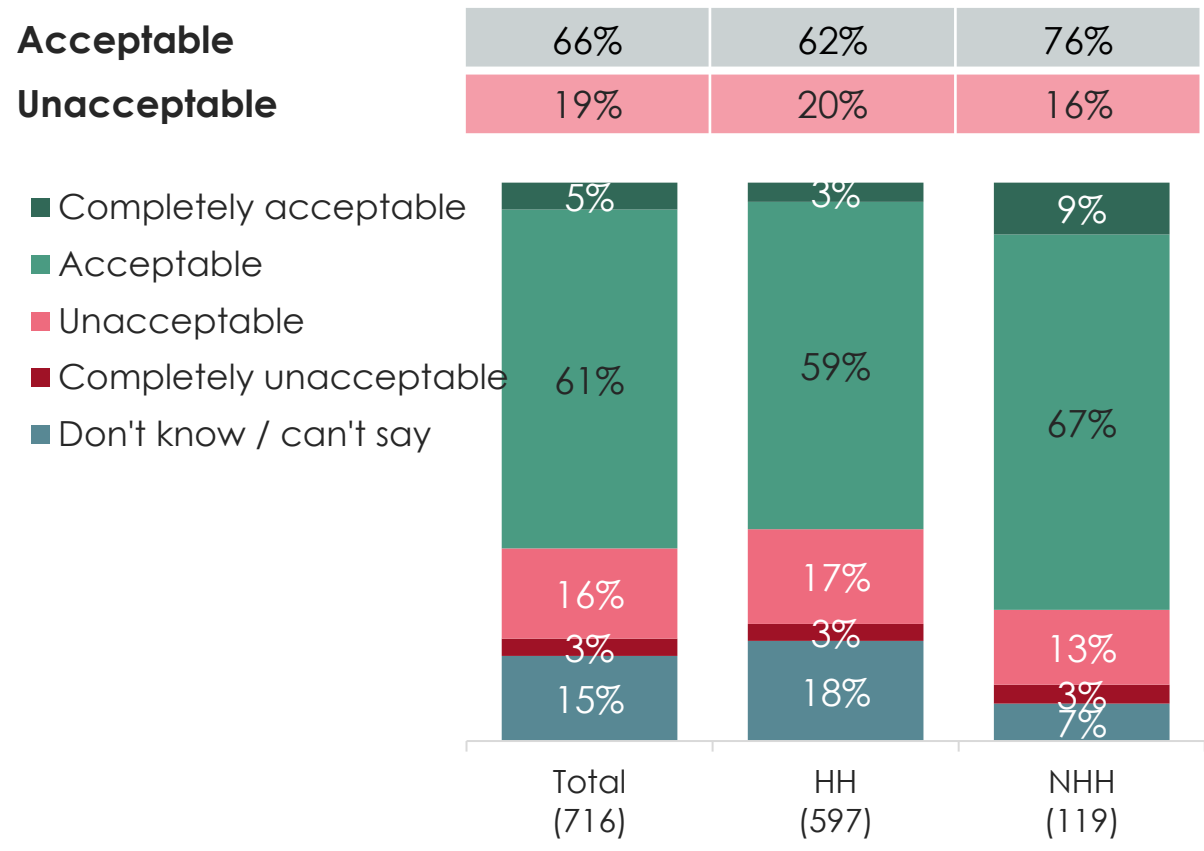


19% overall think BRL's plans are unacceptable; this is slightly lower amongst NHH customers at 16%

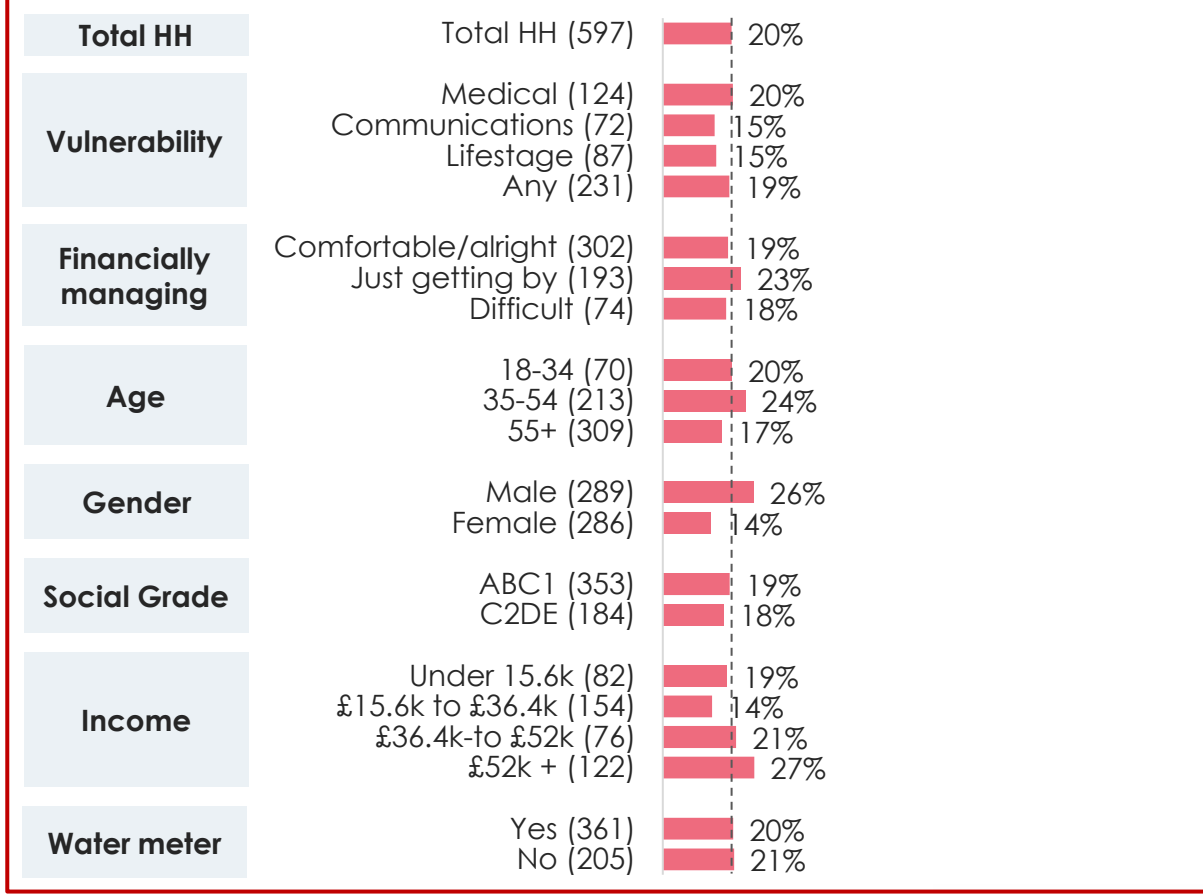
There is little variation within the different HH subgroup differences. Those in higher income brackets are slightly more likely to say they find the plan unacceptable



Acceptability of the overall plan



Plan Unacceptability – Household subgroup differences % of each group who think it is completely unacceptable or unacceptable

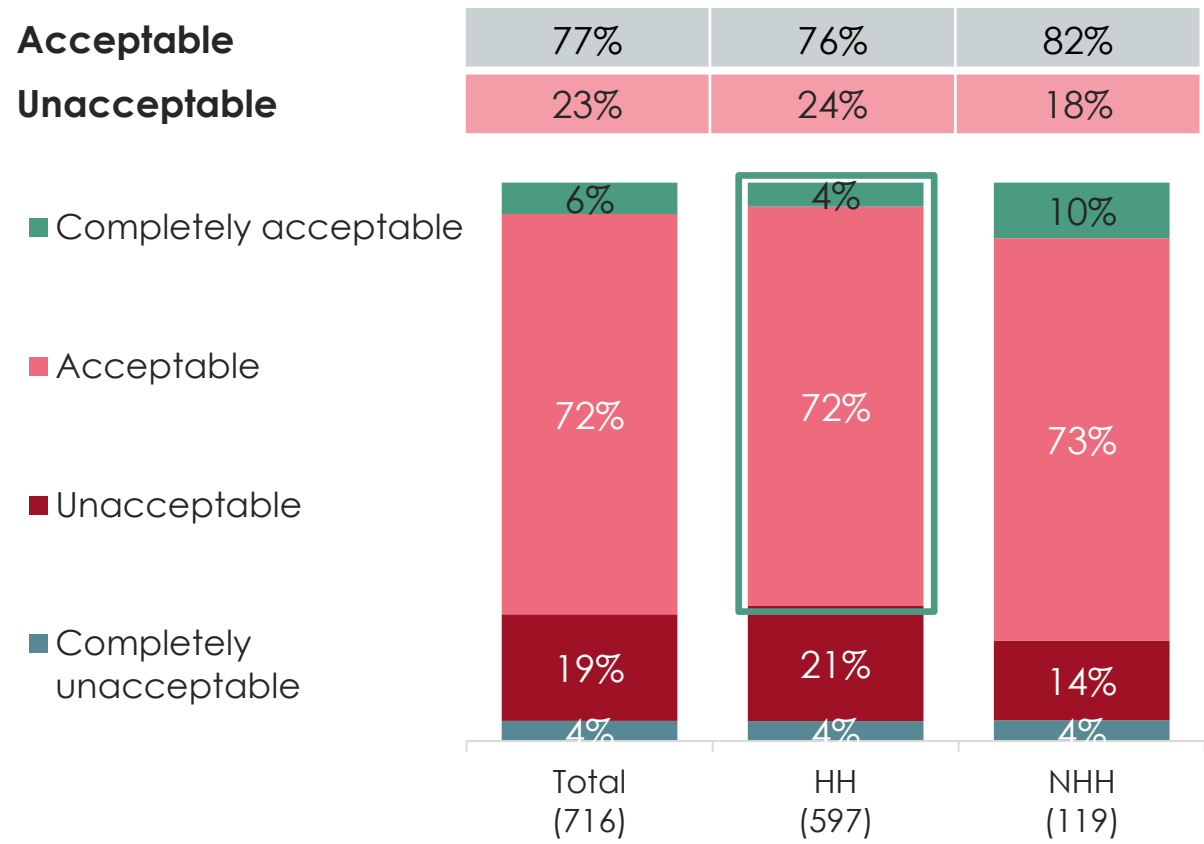


When excluding DK answers, acceptability of BRL's business plan is 77% overall; it is higher amongst NHH customers (82%) than HH customers (76%)

Levels of acceptability is generally quite stable amongst the different HH subgroups



Acceptability of the overall plan



Data excluding 'don't know'

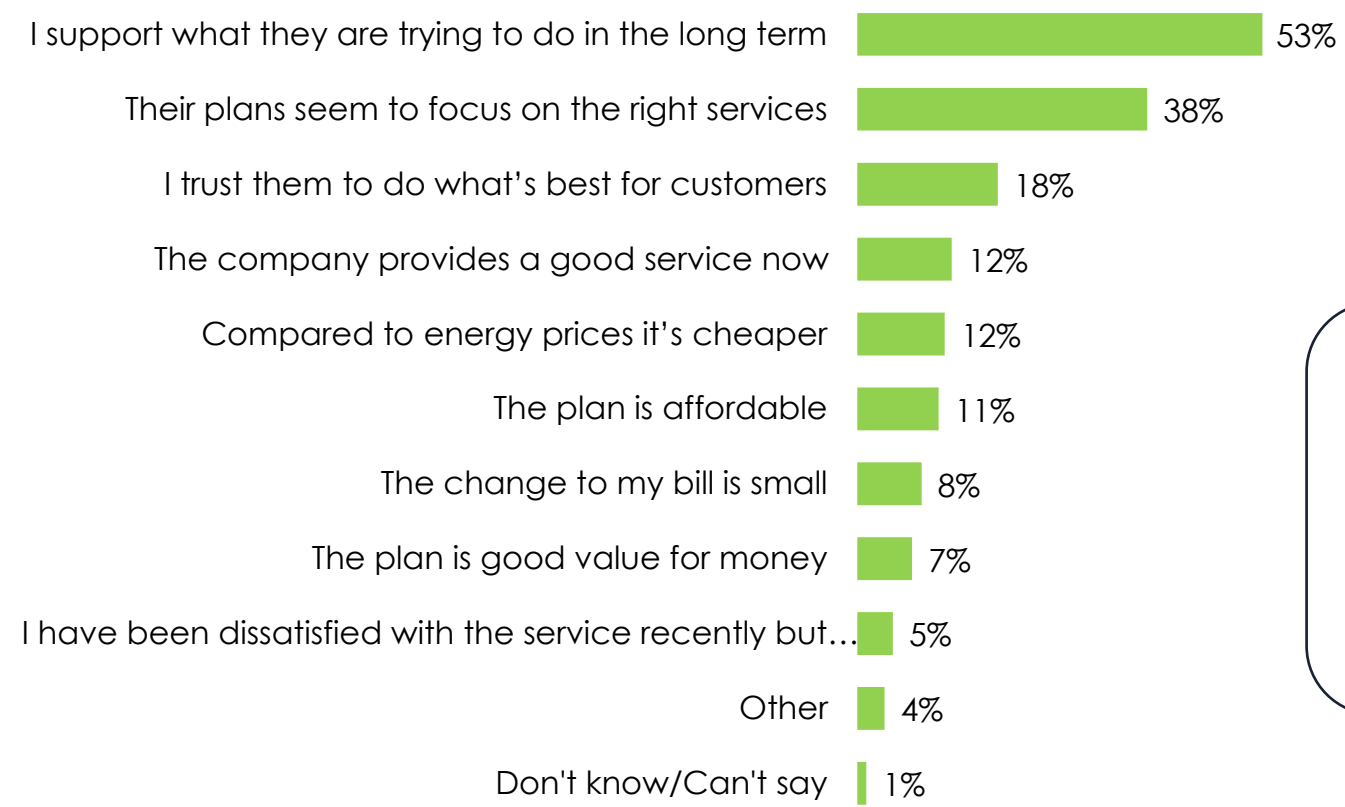
Reasons for accepting the plan were similar to those seen in the qualitative stage

The key reasons why customer endorse the plan is because the they think it focuses on the right things (for the long term), but relatively few choose positive reasons around value for money / affordability



Reasons for accepting the plan

(Household and Non household customers who found the plans acceptable)N



"The stuff they are (suggesting) cutting [for must-do plan] is more concerning - I wouldn't want to go without important things for just £30 at the end of the day."
HH Bristol

"Dealing with leakage now should help for the future. Targets in place to reduce environmental impact is a good idea.."
HH Bristol

"Statutory investment going up is not the scary bit – but salary income is not keeping pace."
HH Bristol

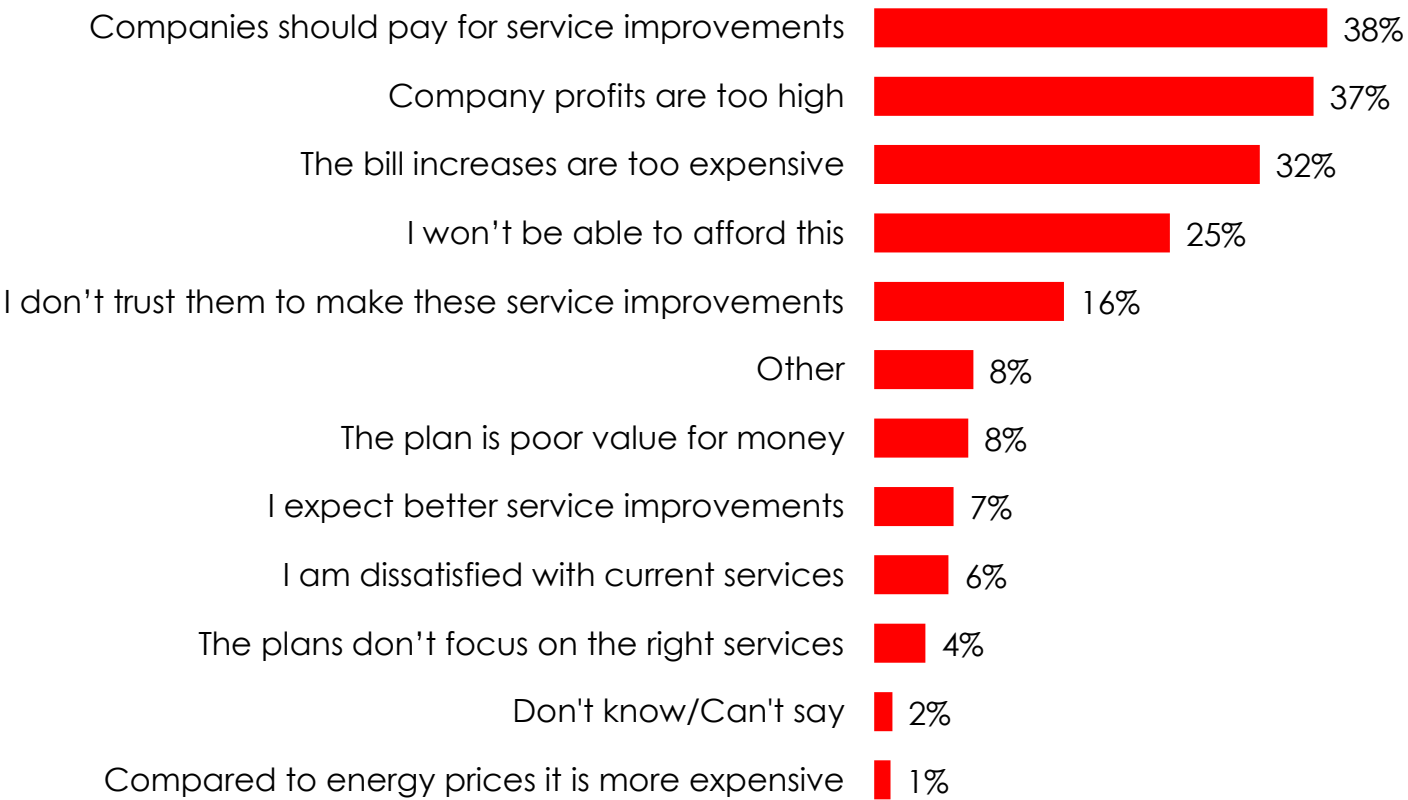
Reasons for not accepting the plan revolve around company profits and cost

The main reason for not accepting the business plan is because customers think water companies' profits are too high, that the companies should pay (more) for improvements. A third think the bills are too expensive and 1 in 4 think they won't be able to afford it



Reasons for not accepting the plan

(Household and Non household customers who found the plans unacceptable)



"It's not a worthwhile investment for the community – it's a plan to justify increases, the way I see it."
HH W-S-M

"Improvements should be managed better through shareholder investments and ploughing more of the profit margin back into further improvements and not into shareholders pockets. The business model for water company's is all wrong. ."
HH W-S-M

"This would cripple me!"
HH W-S-M

Acceptability of proposed plan for water supply services

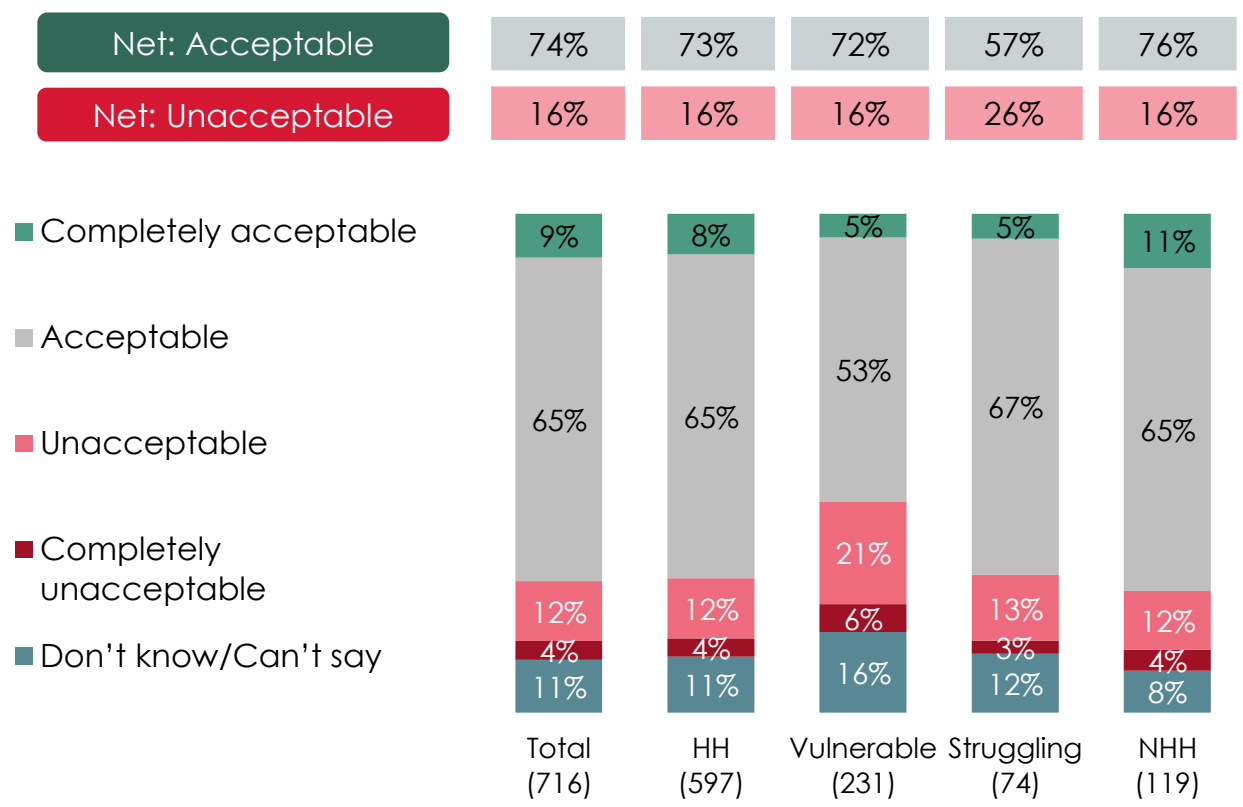
Focusing just on the aspects of BRL's plans for water supply services, acceptability is higher than for the plan overall. There is lower level of acceptability amongst customers who are financially struggling

For detailed stimuli shown to respondents, please see Appendix

Bristol Water's plan for <u>water supply</u> services 2025-30		
These are key elements of Bristol Water's business plan only, and do not make up the full set of activities or costs.		
By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage per property per day from 56.5 litres in 2025 to 50.7 in 2030	£5
	Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£3
	Become operationally carbon neutral and create 40,000 hectares of habitat	£2
	Install 175,000 smart water meters	£2
	Upgrading treatment works and replace 10,000 lead pipes	£10
£/yr means the added amount on to the average current annual bill (excluding inflation) by 2030		

Bristol Water's plan for <u>water supply</u> services 2025-30		
These are key elements of Bristol Water's business plan only, and do not make up the full set of activities or costs.		
By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage per property per day from 56.5 litres in 2025 to 50.7 in 2030	£11
	Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£7
	Become operationally carbon neutral and create 40,000 hectares of habitat	£4
	Install 175,000 smart water meters	£4
	Upgrading treatment works and replace 10,000 lead pipes	£22
£/yr means the added amount on an example annual bill of £500 today (excluding inflation) by 2030		

How acceptable or unacceptable is the business plan for the water supply services?



Q10a. Based on everything you have seen and read Bristol Water's proposed business plan for water supply services, how acceptable or unacceptable is it to you? **Base** Household and Non household bill payers (716)
WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES

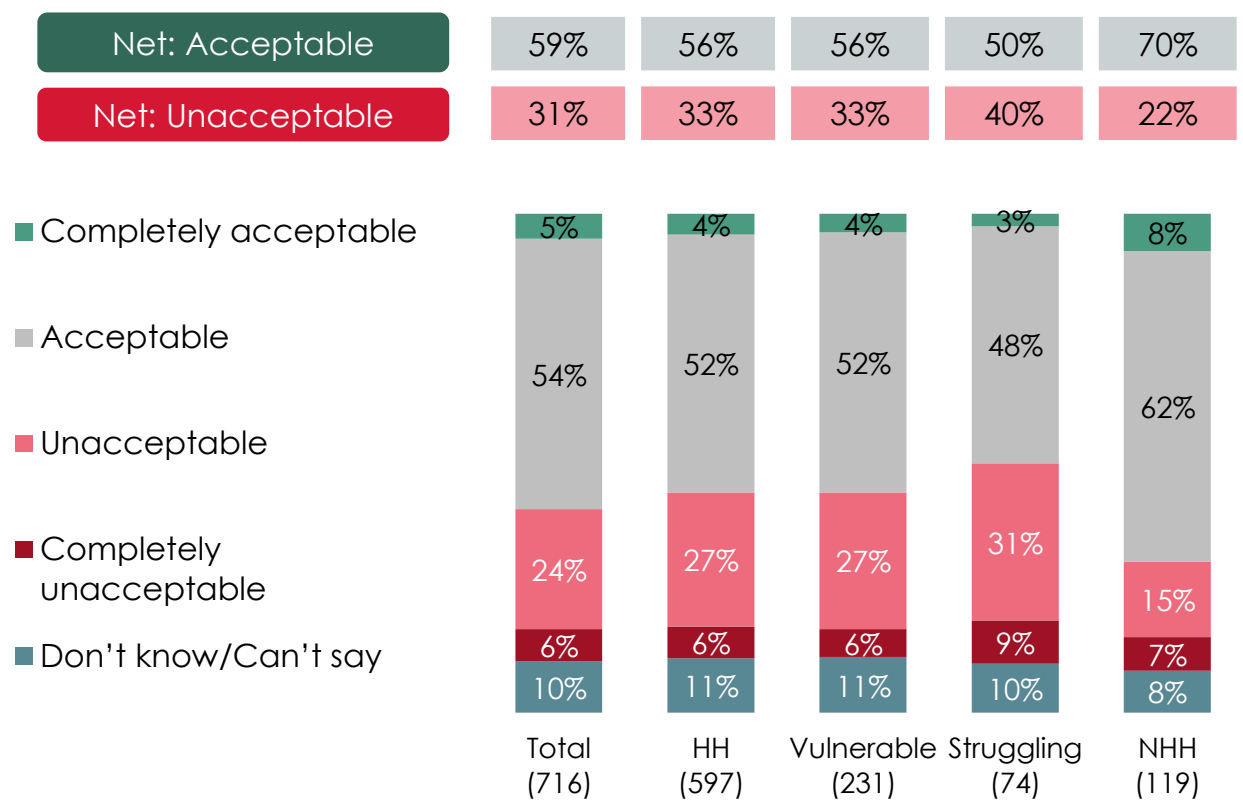
Acceptability of proposed plan for sewerage services

Focusing on the sewerage services aspects of BRL's plans, acceptability is notably lower than for the water only plan. NHH customers are more likely to be on board with the sewerage only elements of the plan vs HH customers

For detailed stimuli shown to respondents, please see Appendix

Wessex Water's plan for sewerage services 2025-30		Wessex Water's plan for sewerage services 2025-30	
These are key elements of Wessex Water's business plan only, and do not make up the full set of activities or costs.		These are key elements of Wessex Water's business plan only, and do not make up the full set of activities or costs.	
By 2030...	£/yr	By 2030...	£/yr
Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£2	Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£5
Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£2	Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£5
Reduce pollution incidents from 20.6 to 15.7 per 10,000km of sewer	£5	Reduce pollution incidents from 20.6 to 15.7 per 10,000km of sewer	£12
Remove everyone from water poverty	£24	Remove everyone from water poverty	£0
Prevent excess nitrogen and phosphorous entering rivers & sea (Legally required)	£57	Prevent excess nitrogen and phosphorous entering rivers & sea (Legally required)	£137
Reduce sewage spills at 148 sites, focusing on sensitive sites (Legally required)	£23	Reduce sewage spills at 148 sites, focusing on sensitive sites (Legally required)	£55
£/yr means the added amount on to the average current annual bill (excluding inflation) by 2030		£/yr means the added amount (excluding inflation) on to an example current annual bill of £1,000 by 2030.	

How acceptable or unacceptable is the business plan for the sewerage services?



Q10b. Based on everything you have seen and read Wessex Water's proposed business plan for sewerage services, how acceptable or unacceptable is it to you? **Base** Household and Non household bill payers: Total (716); **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**



Bournemouth Water



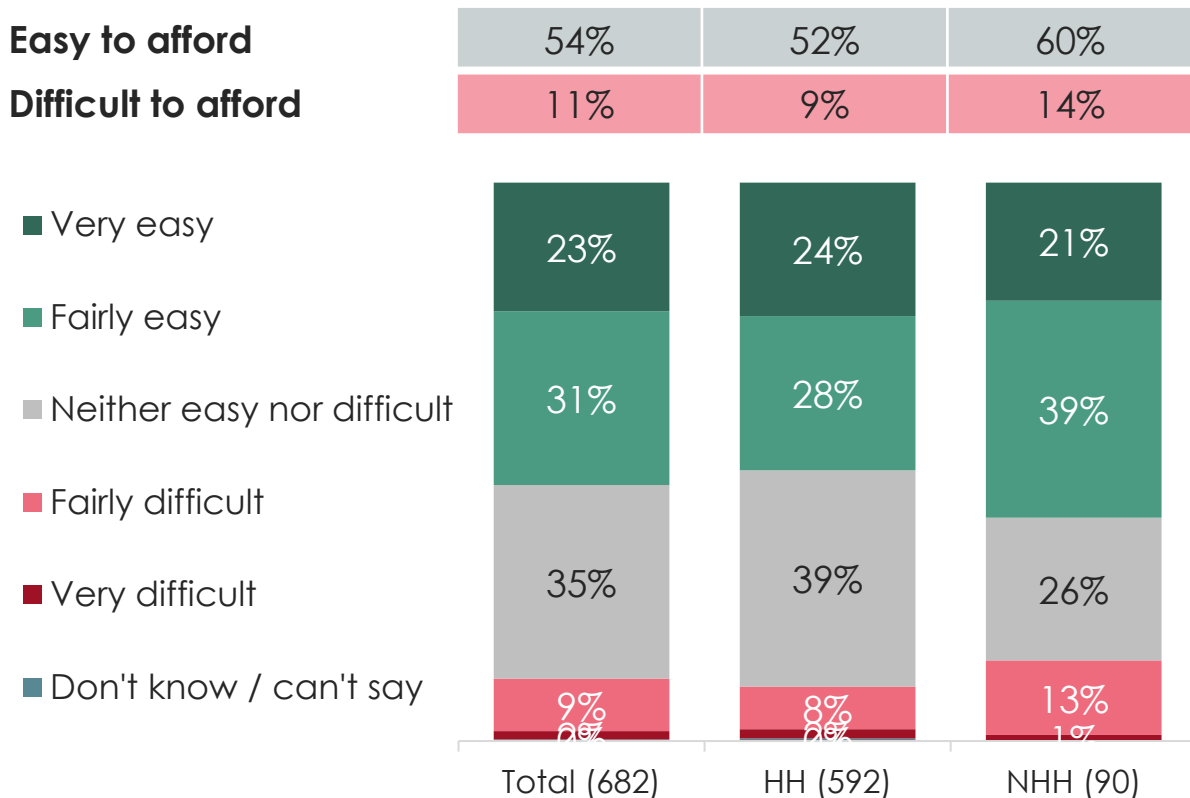
Current bill affordability

Current water and sewerage bill affordability

Over a half say their water and sewerage bills are easy to afford as they currently stand. Those who are finding it difficult to manage financially in general are much more likely to be struggling to pay their current water services bill.

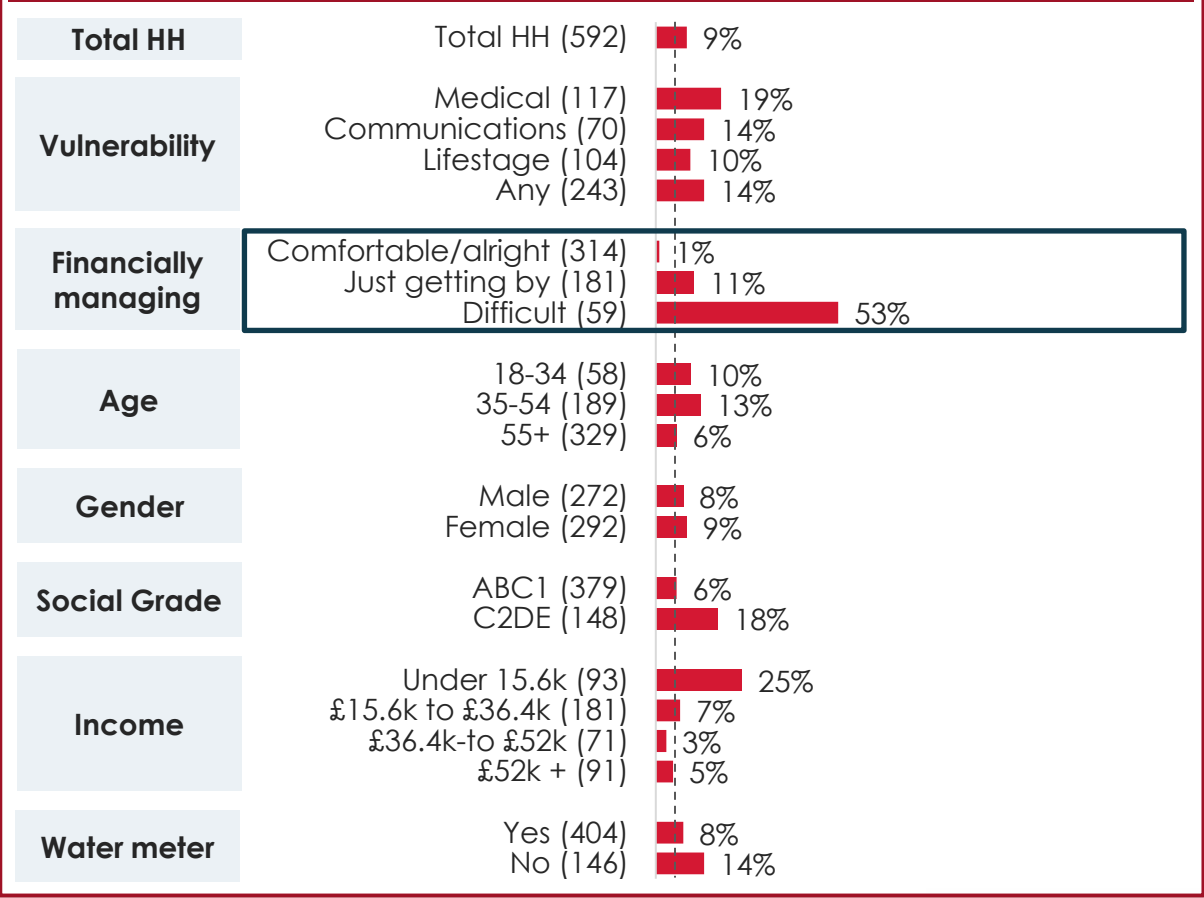


How easy or difficult to afford current water & sewerage bill?



Bill Affordability – Household subgroup differences

% of each group who think it will be difficult to afford



Q4. How easy or difficult is it for you to afford to pay your/your organisation current water and sewerage bill?

Base Total household and non-household bill payers (682)

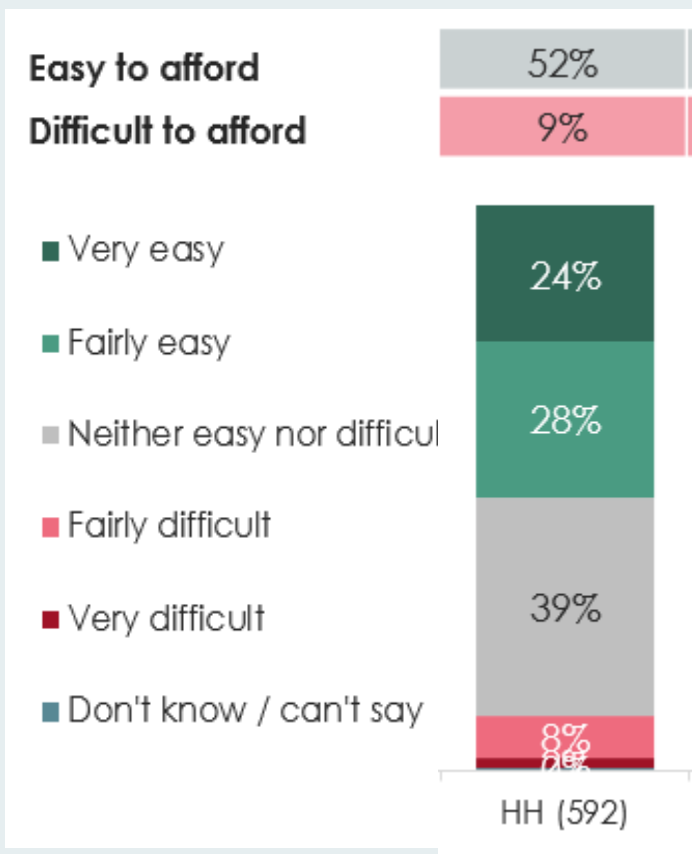
WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES



BLUE MARBLE

How easy or difficult to afford current water and sewerage bill?

Quantitative data



Q4 How easy or difficult is it for you to afford to pay your current water and sewerage bill?

Base HOUSEHOLD bill payers (592)



Qualitative insights

- Affordability of customers' current water and sewerage bill in the qualitative research was a similar picture to the quantitative research:
 - A minority (1/15) of household customers found it difficult to pay their current water and sewerage bills
- However, in the qualitative research we saw that the current economic climate has impacted customers, with very few feeling optimistic about the future.
- Whilst bills remain affordable for most, the cost of living is having an impact in that customers are having to cut back on expenditure outside of food and bills (e.g. holidays, recreation, treats).

"The cost of living is impacting on me and I notice this in my bank statement at the end of each month. I am now choosing to forego/reduce purchases in order to save money."
HH Bournemouth

"I do not struggle to pay bills but can't afford holidays."
HH Bournemouth



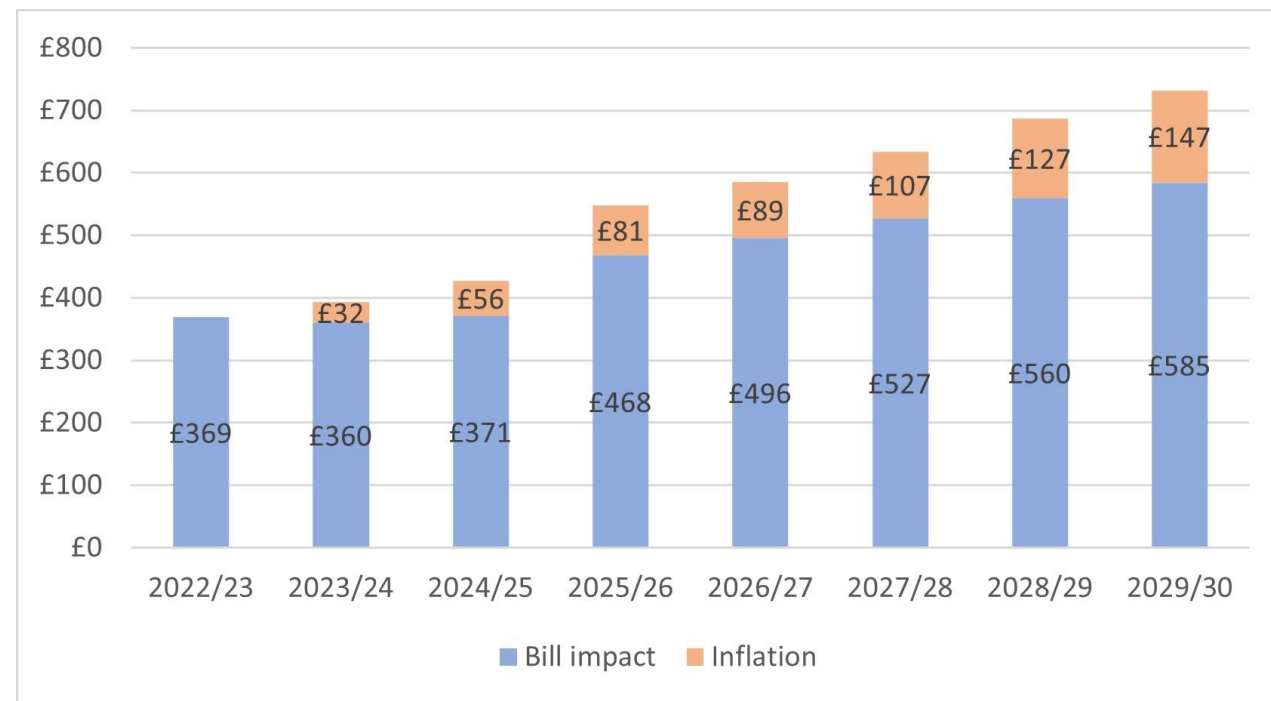
Future bill affordability for business plan

Bill Impact affordability – stimulus shown

Household customers were shown the bill increases for 2022-23 to 2029-30, based on their current annualised bill (and whether or not they are on social tariff, as flagged in the customer sample). Where bill information was not available, a bill profile based on the average annualised bill was shown

Non-household customers were shown the bill increases for 2022-23 to 2029-30, based on a bill of £1000 for 2022-23.

The bill is split into the proposed costs to cover the investments in water and sewerage services needed over the next few years, and predicted inflation (in orange).

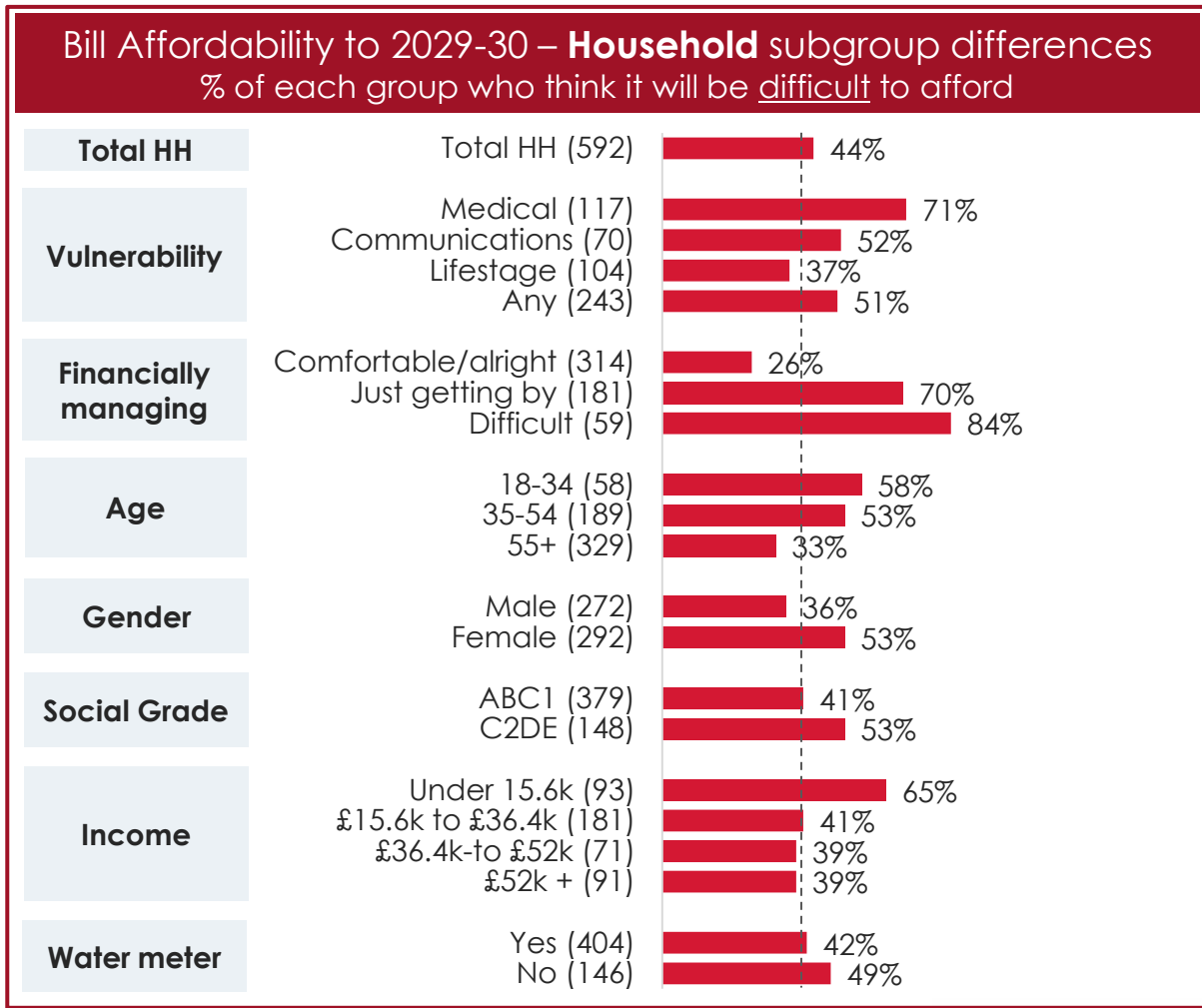
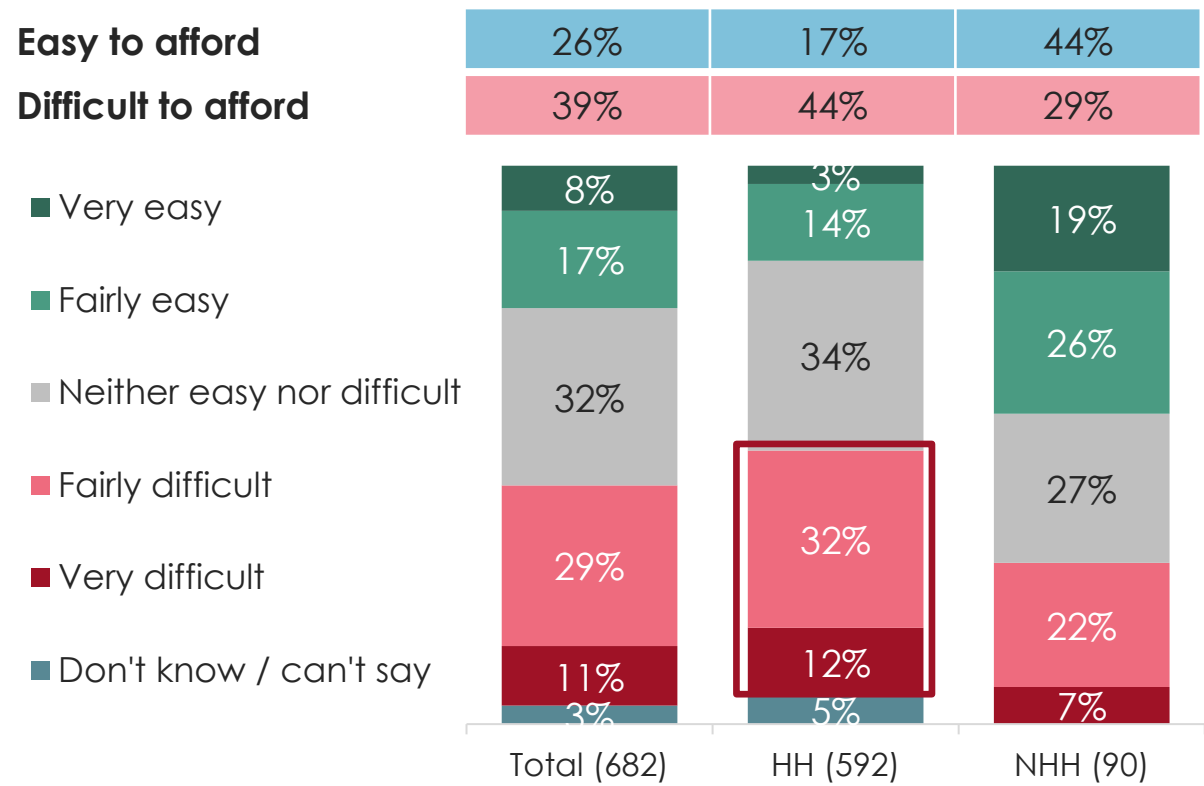


Example personalised bill profile shown

4 in 10 foresee they will struggle with the future bill increases – NHH customers more confident that they can easily afford the future water and sewerage bills than household customers

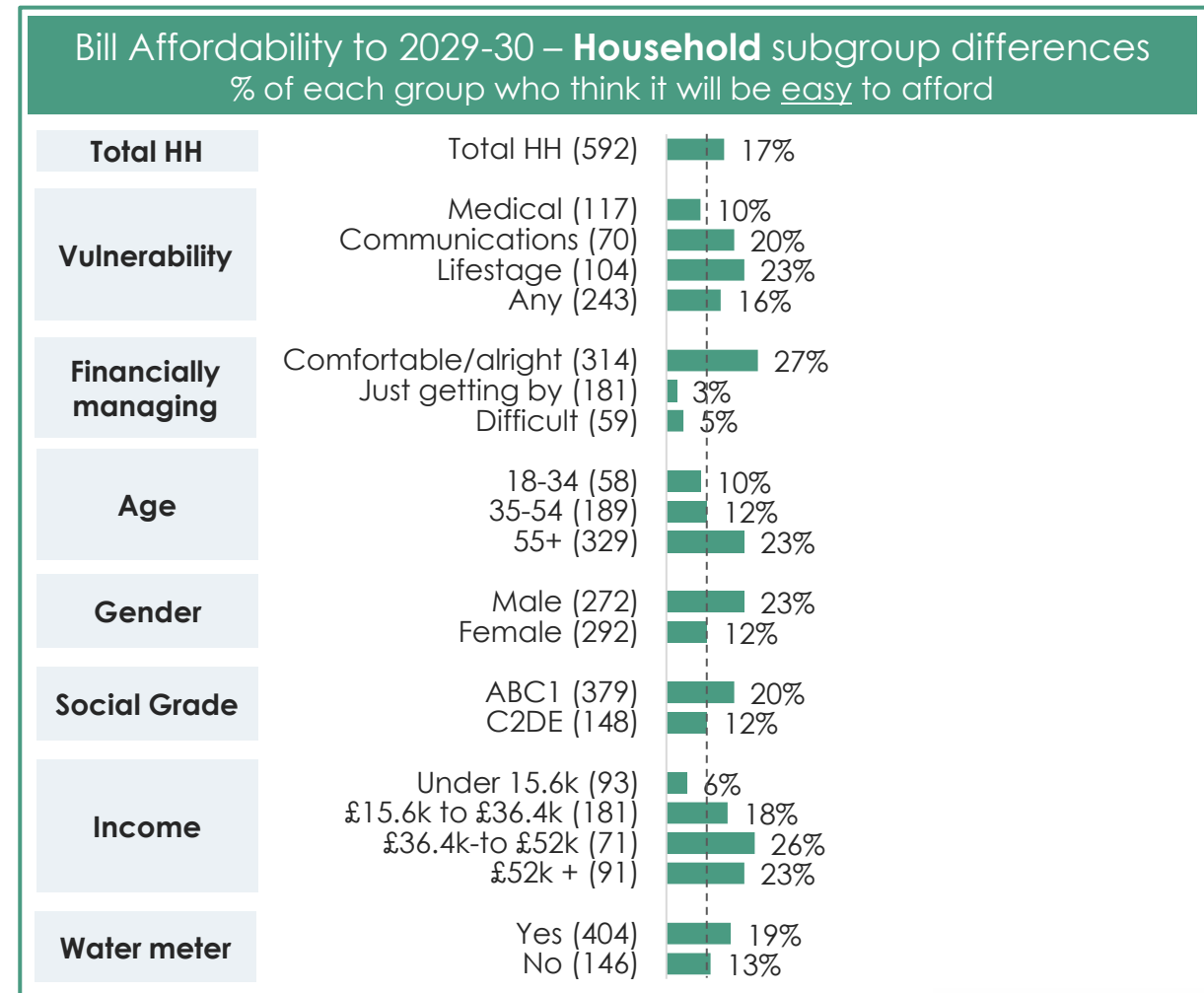
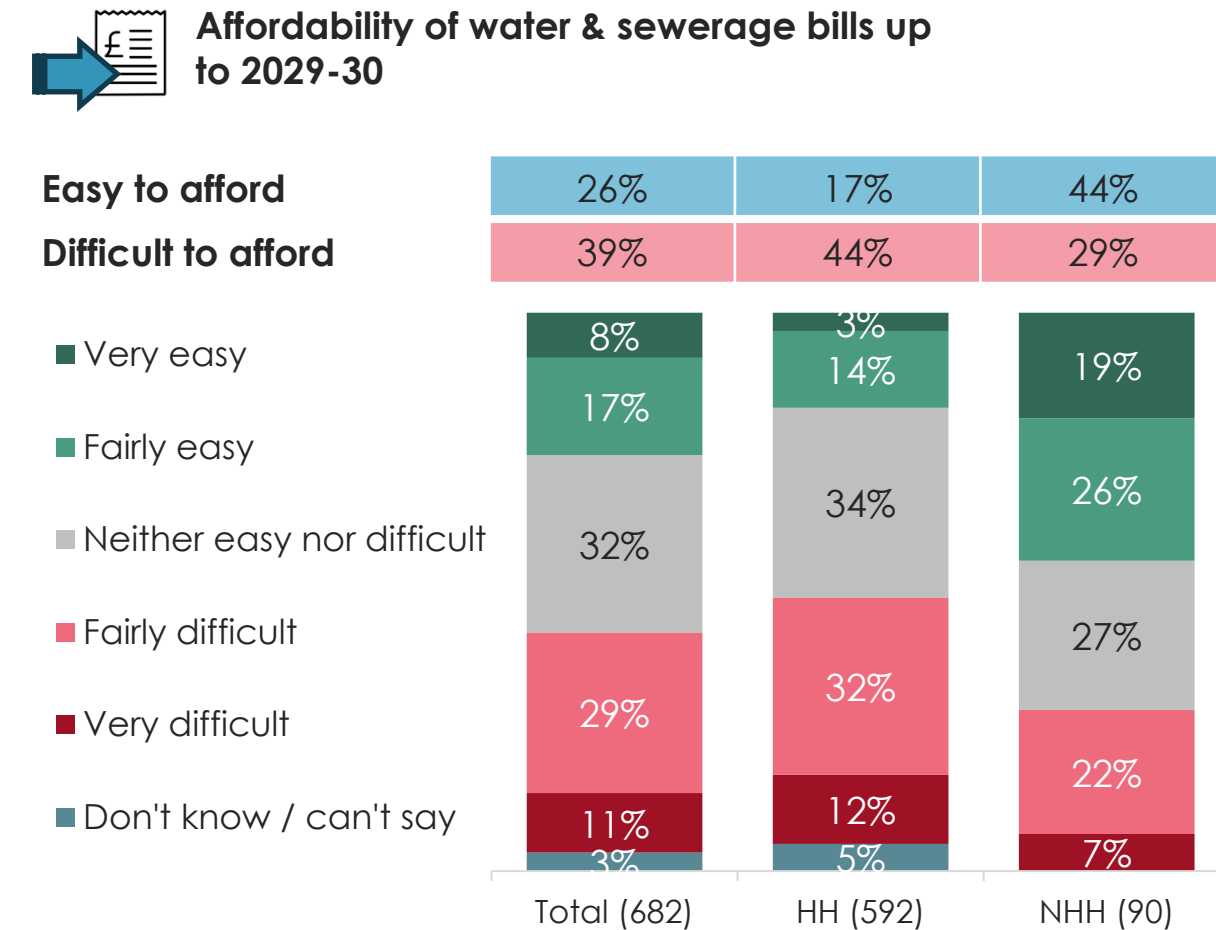
Lowest income households, lower social grade, and households who do not feel 'comfortable or alright' financially are more worried about being able to afford. Younger customers also say they would find it difficult to afford future bills

Affordability of water & sewerage bills up to 2029-30



A quarter of customers feel they would find it easy to afford their future bills – a sentiment more widespread amongst NHH customers

Affordability levels are low even amongst those in more financially comfortable situations

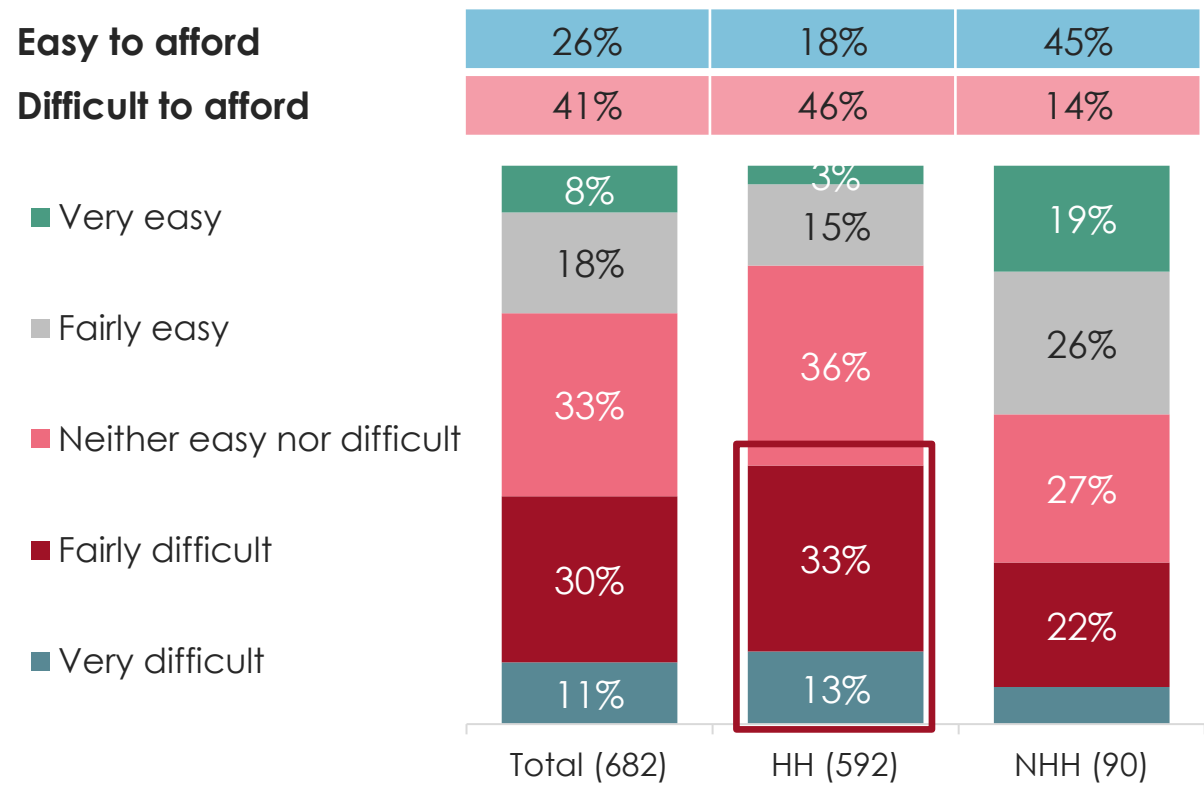


4 in 10 foresee they will struggle with the future bill increases – NHH customers more confident that they can easily afford the future water and sewerage bills than HH customers

Lowest income households, lower social grade, and households who do not feel 'comfortable or alright' financially are more worried about being able to afford. Younger customers also say they would find it difficult to afford future bills



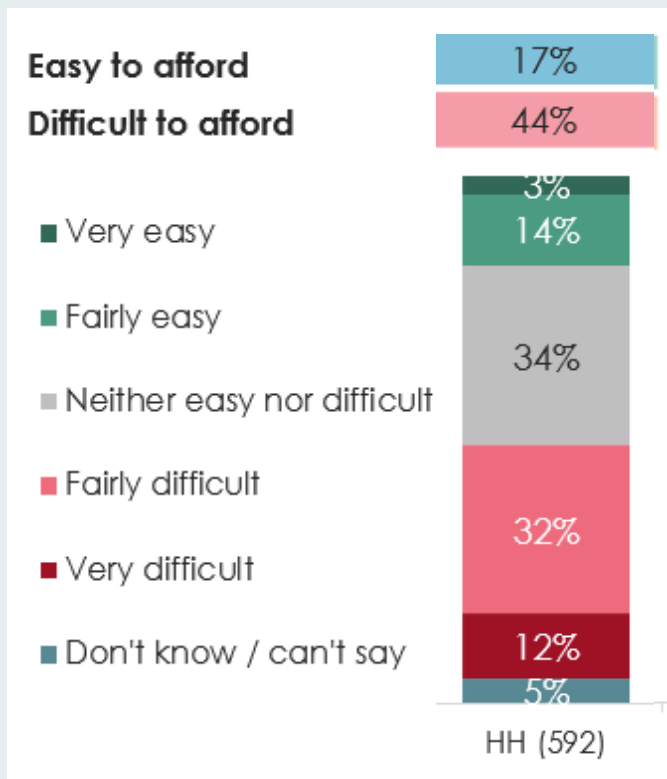
Affordability of water & sewerage bills up to 2029-30



Data excluding 'don't know'



Affordability of water & sewerage bills up to 2029-30 (Total households)



Q5 How easy or difficult do you think it would be for you to afford these water and sewerage bills?

Base HOUSEHOLD bill payers (592)



Qualitative insights

- Affordability of the proposed plan in the qualitative research was a very similar picture to the quantitative research:
 - 1/15 of the household sample (BW supply area) said it would be easy to afford the proposed plan and 5/15 said it would be difficult to afford.
- The qualitative research showed customers were surprised to see both....
 - the **rate** of increase
 - the scale of **inflation**
- Customers feel that water companies should pay for more of the plan with their profits alongside stating that the projected bill increases are too expensive.

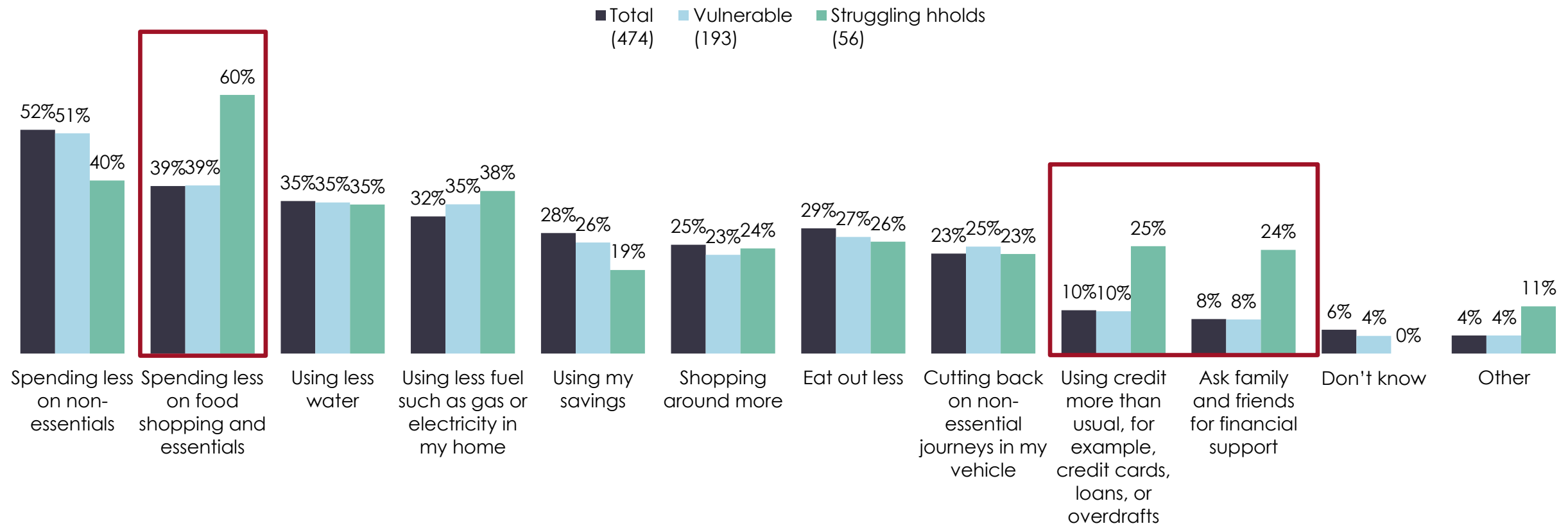
"It's hard to know... how much pay is going to increase in time and everything like that. Hard to know. It does feel like bills going up."
HH Bournemouth

"Seems a lot because I mean my bill for last year was hundred and 80 pounds. Just add-ons are going to be more than that. That doesn't seem right to me."
HH Bournemouth

How customers would pay for increased water bills between 2025 and 2030

A half of customers said they would spend less on non-essentials, but 2 in 5 say they would need to spend less on essentials. Those struggling financially are more likely to cut down on essentials but would also rely on credit and family and friends to cope

Which of the following would you need to do to pay for the water bill increases between 2025 and 2030? (Those who say they would struggle to pay the proposed bill from 2025-2030)



Q6. Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

Base Household bill payers who would not find it easy to pay for the increase in water bills: Total (474); Vulnerable households (193) Struggling households (56).

WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES

A close-up photograph of a person's hands interacting with a silver laptop. The left hand is pointing at the screen, while the right hand is on the trackpad. The person is wearing a black fitness tracker on their left wrist and a silver ring on their right ring finger. A semi-transparent teal banner is overlaid across the middle of the image, containing the text "Business plan components" in white. The background is a blurred office setting.

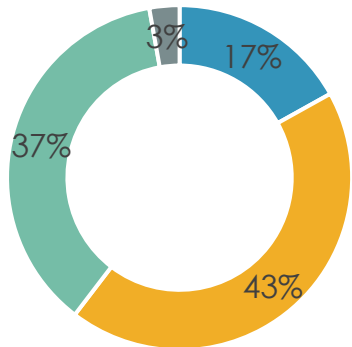
Business plan components

Business plan: Areas of priority – Summary

Which of these three parts of the business plan is the most important to you?

Performance Commitments – Water

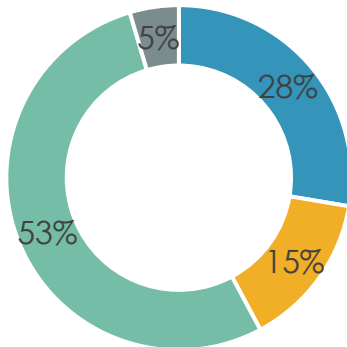
All customers (682)



- Water supply interruptions lasting longer than 3 hours
- Reducing leaks
- The appearance, taste and smell of tap water
- Don't know/Can't say

Additional Plan Components – Water

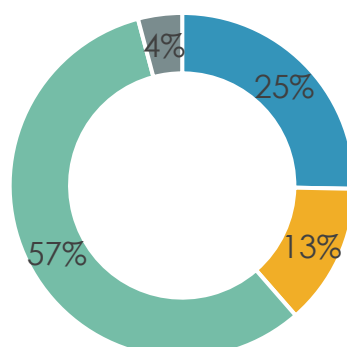
All customers (682)



- Developing new and more flexible water supplies
- Installing smart water meters
- Improving tap water quality through upgrading treatment works and replacing lead pipes
- Don't know/Can't say

Performance Commitments – Sewerage

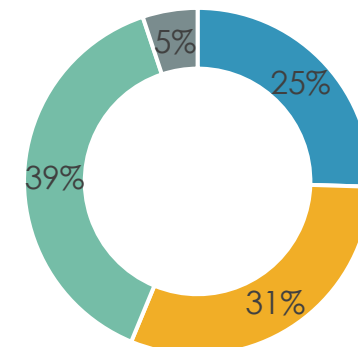
All customers (682)



- Sewage flooding of properties - inside properties
- Sewage flooding of gardens, outbuildings or access points
- Pollution of rivers and bathing waters
- Don't know/Can't say

Additional Plan Components – Sewerage

All customers (682)



- Removing everyone from water poverty
- Preventing excess nitrogen and phosphorous from entering rivers and sea
- Reducing sewage spills
- Don't know/Can't say

Q7. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: Total (682);
WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES

Water Supply Performance Commitments – Importance

Reducing leaks is rated the most important of the water supply PCs overall, although those struggling to pay place slightly greater importance on water quality, and a larger minority of NHH customers rate supply interruptions as most important

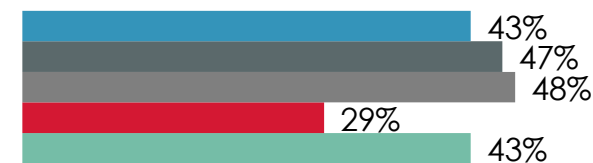
For detailed stimuli shown to respondents, please see Appendix

Which of these three parts of the business plan is the most important to you: Common Performance Commitments (Water)

BW customers



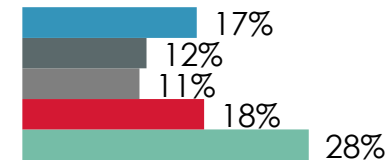
Reducing leaks



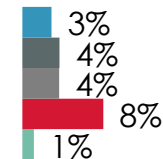
The appearance, taste and smell of tap water



Water supply interruptions, lasting longer than 3 hours



Don't know/Can't say



■ Total (682) ■ Household (592) ■ Vulnerable (243)

■ Struggling to pay (59) ■ NHH (90)

Water supply interruptions, lasting longer than 3 hours

What does this mean? It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected.

How are Bournemouth Water (as part of South West Water) performing on this? Water companies are measured on the length of time properties are without water. The measure used is the duration without water for more than 3 hours by minutes per property. Bournemouth Water's performance on this measure is currently 13 mins 40 seconds. **Bournemouth Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Achieve the target level for supply interruptions by 2025 (at 5 minutes per property) and then maintain this level up to 2030.
How will they do it?	<ul style="list-style-type: none"> Repair water pipes Replace the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.

Reducing leaks

What does this mean? Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

How are Bournemouth Water (as part of South West Water) performing on this? Water companies are measured on the amount of water lost due to leaks in water mains and pipes. The measure used is annual leakage per property served (litres per day). Bournemouth Water's annual leakage currently stands at 108 litres per property per day. **Bournemouth Water met their target last year.**

What is the plan for this?

Benefit by 2030	Reduce leakage from 83.6 litres per property per day in 2025 to 78 in 2030 and so reduce the amount of water Bournemouth Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> Repair leaks when they find them Replace old water mains Help customers to replace their leaky pipes too.
Cost on bill	This will add £5 to the average annual bill (excluding inflation) by 2030.

Appearance, taste and smell of tap water

What does this mean? Tap water may look, taste or smell different to usual. When it is not safe to drink, people may prefer bottled water until it returns to normal.

How are Bournemouth Water (as part of South West Water) performing on this? Water companies are measured on the number of customer contacts regarding the appearance, taste and smell of tap water per 1,000 population. Bournemouth Water currently receives 1.55 contacts regarding the appearance, taste and smell of tap water per 1,000 population in the area. **Bournemouth Water met their target for this metric last year.**

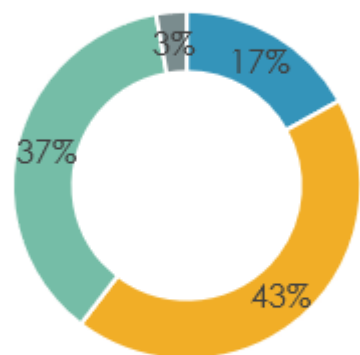
What is the plan for this?

Benefit by 2030	Reduce the number of contacts about the appearance, taste and smell of tap water from 1.55 per 1,000 population in 2025 to 1.10 per 1,000 population in 2030.
How will they do it?	<ul style="list-style-type: none"> Replace cast iron mains which can cause a brown tinge to tap water.
Cost on bill	This will add £4 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you? Quantitative data

Performance Commitments – Water

All customers (682)



- Water supply interruptions lasting longer than 3 hours
- Reducing leaks
- The appearance, taste and smell of tap water
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Reducing leaks:** customers were shocked and frustrated by the amount of water lost through leakage
 - Customers would like to see a more ambitious target here

- **Appearance, taste and smell of tap water:** a high priority – water quality is crucial as it is a basic need
 - Not something that customers want to compromise on, and the investment cost is relatively low

- **Supply interruptions:** compared with other performance commitments, this feels like a medium-level priority
 - Doesn't feel like a massive problem faced by customers in this region

*"I bet so many people have leaky toilets, taps, things like that. I fixed a leaky toilet at home recently. Sometimes it's so subtle you can barely see it's just leaking a tiny bit. And it uses probably so much water."
HH Bournemouth*

Additional water supply plan components – Importance

Improving tap water through treatment works and replacing lead pipes was deemed the most important priority to address out of the three additional plan components. Installing smart meters more important amongst NHH customers

For detailed stimuli shown to respondents, please see Appendix

Bournemouth Water Installing smart water meters

What is this? Smart water meters can encourage water saving by increasing customers' awareness of their water use, they can reduce wastage, identify leaks, and make bills fairer, as all pay for what they use.

What is the current situation? 80% of properties in the Bournemouth Water region have a smart meter, but very few have a smart water meter not possible to see water use in real-time.

What is the plan for this?

Benefit by 2030 Installing smart water meters will save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also encourage fairer ways to charge customers.

How will they do it? Across the Bournemouth Water region:
 • A programme of installing smart meters: 350,000 smart meters installed by 2030 (and all customers to have one by 2040)
 • Help customers to use less water through efficiency advice and smart meters.

Cost on bill This will add £2 to the average annual bill (excluding inflation) by 2030.

Bournemouth Water Improving tap water quality through upgrading treatment works and replacing lead pipes

What does this mean? Lead pipes still connect some customers' properties to the water mains, meaning there is a risk that traces of lead can get into tap water. There is also a very small risk of microbiological contamination of tap water.

What is the current situation?

- Lead pipes on customers' properties (owned by customers) affect 80,000 properties in the region. Currently harmless chemical additives in the water supply to prevent any negative impact of lead pipes on health.
- Low risk of microbiological contamination of water which would result in a 'boil your tap water' notice.

What is the plan for this?

Benefit by 2030 Reduce risk of lead exposure for 5,000 properties between 2020 and 2030; reduce risk of boil your tap water notice.

How will they do it?

- Offer a mix of free and subsidised replacement for lead pipes by customers; those on low incomes receive free replacement.
- Upgrade water treatment works.

Cost on bill This will add £8 to the average annual bill (excluding inflation) by 2030.

Bournemouth Water Developing new and more flexible water supplies

What is this? Investing in new supplies of water such as reservoirs and increasing the capacity to treat this water. Investing in large pipes to move water around the region more flexibly.

What is the current situation? Climate change and growing population mean that in future there will be greater pressure on sources of water, and more water will need to be taken (or 'abstracted') from environmentally sensitive sites.

What is the plan for this?

Benefit by 2030 Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.

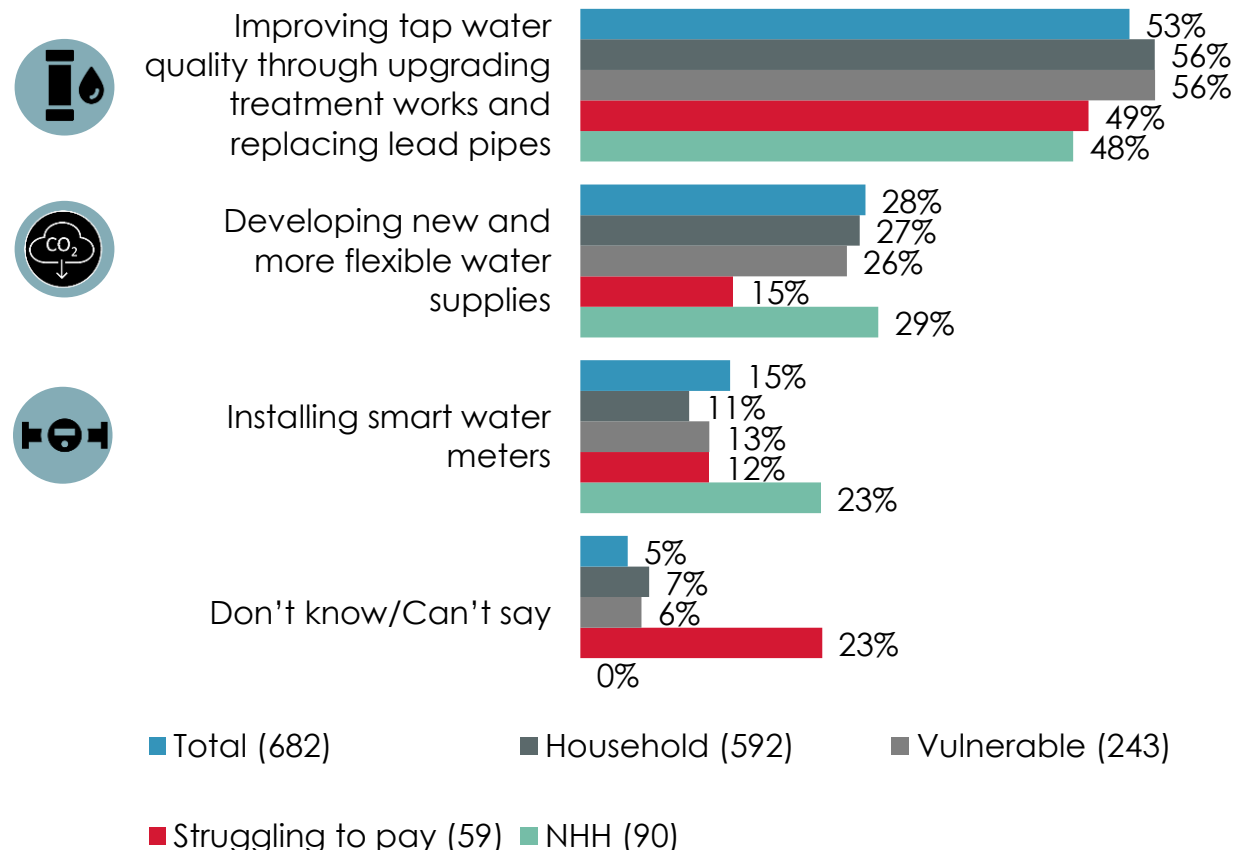
How will they do it?

- Develop a new reservoir from a disused quarry.
- Develop new groundwater sources.
- Increase water treatment capacity.
- Build a new water re-use plant to recycle wastewater into clean water.
- Start to build a major new regional reservoir in the Mendip Hills.

Cost on bill This will add £13 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Additional Plan Components (Water)

BW customers

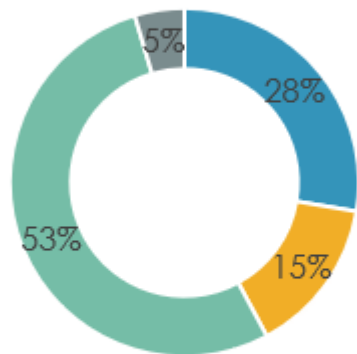


Q7b. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: (682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Additional Plan Components – Water

All customers
(682)



■ Developing new and more flexible water supplies

■ Installing smart water meters

■ Improving tap water quality through upgrading treatment works and replacing lead pipes

■ Don't know/Can't say



Qualitative insights based on deliberative discussions

- Replacing lead pipes:** if keeping the lead pipes in place is dangerous, customers feel this is urgent and agree with proposed plan.
 - However, if the health concerns are not serious, they don't see the need to spend on this investment.
- Developing new and more flexible water supplies:** customers are supportive of this investment as resilience is vital to ensure we have enough water in future.
- Smart meters:** Smart meters are considered to only really benefit water companies, with minimal benefit for customers – a non-urgent investment.
 - There is scepticism around how well they work, how much can be saved (financially) and whether it should be a priority.
 - Previous poor experience (with energy providers) plays a role for some customers.

"It's an easy win!"
HH
Bournemouth

"This feels more like a nice to have than a must have."
HH Bournemouth

Sewerage Performance Commitments – Importance

All customer groups rated pollution and bathing waters the most important issue to address. However, for those struggling financially mitigating internal sewage flooding was almost as important as addressing pollution.

Sewage flooding of properties – internal

What does this mean? An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

How are Wessex Water performing on this? Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 1.42 incidents of internal sewer flooding per 10,000 properties.

Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce internal sewer flooding incidents from 1.42 to 1.17 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

Sewage flooding of properties – external

What does this mean? An escape of sewage into gardens or access points to peoples' properties is inconvenient and unpleasant and can restrict access.

How are Wessex Water performing on this? Water companies are measured on the incidents of sewage flooding gardens or outbuildings. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 19.2 incidents of external sewer flooding per 10,000 properties.

Wessex Water did not meet their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce external sewer flooding from 19.2 to 14.5 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

Pollution of rivers and bathing waters

What does this mean? Discharges from sewage works can affect rivers and bathing waters have a minimal effect on the river or effect depending on the scale.

How are Wessex Water performing on this? Water companies are measured on the number of incidents per 10,000 km of sewer. Wessex Water currently have 20.6 pollution incidents per 10,000 km of sewer.

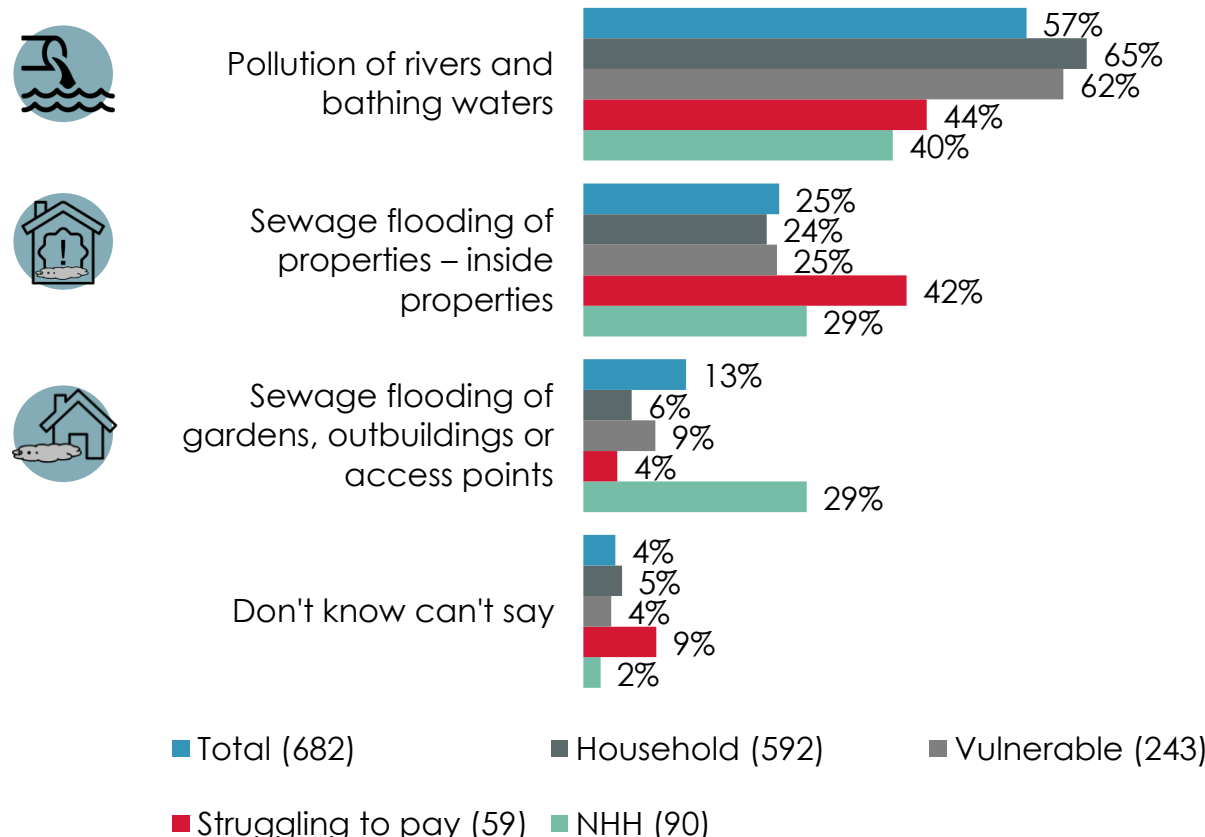
Wessex Water did not meet their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce pollution incidents from 20.6 to 10 per 10,000 km of sewer.
How will they do it?	<ul style="list-style-type: none"> Installing more monitors to predict when incidents might occur Using artificial intelligence to improve their response times Cleaning sewers more often to stop problems before they occur.
Cost on bill	This will add £5 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Common Performance Commitments (Sewerage)

BW customers

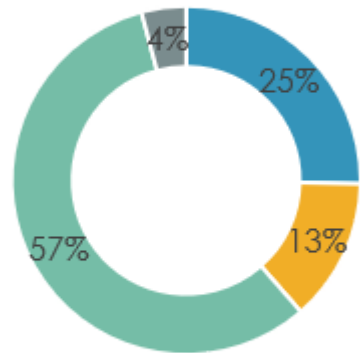


Q7c. Based on what you have just read, which of these three parts of the business plan is the most important to you?
Base Household and Non household bill payers: Total (682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Performance Commitments – Sewerage

All customers
(682)



- Sewage flooding of properties - inside properties
- Sewage flooding of gardens, outbuildings or access points
- Pollution of rivers and bathing waters
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Pollution of rivers and bathing waters:** a high priority investment – pollution is felt to be a big issue at the moment

"The thing that seems to affect us is pollution..."
HH Bournemouth

- **Internal sewer flooding and External sewer flooding:** These investments were considered lower priority – flooding doesn't feel like a pertinent issue in the Bournemouth region
 - Some considered that they would be paying for customers in other areas to benefit

Additional sewerage plan components – Importance

Share of vote amongst the three additional plan components relatively equally split, though reducing sewage spills and preventing excess of nitrogen/phosphorus gains the slightly more traction than addressing water poverty.

FOR YOU. FOR LIFE. Removing everyone from water poverty

What does this mean? Water poverty is when a household spends more than 5% of its disposable income on the water bill.

What is the current situation? Wessex Water have already given financial support to 55,000 households in water poverty. This is known as a 'social tariff' as the support is paid for through other customers' bills. There are likely to be many more households in the region who need help in the future.

What is the plan for this?

Benefit by 2030 Remove everyone from water poverty by 2030, so all customers will be able to afford their bill.

How will they do it?

- Giving financial support to more customers in water poverty - increasing assistance to help around 100,000 households in total
- Continuing to work with partners such as Citizens Advice
- Making it easier to get support, through automatic bill reductions
- Funding community projects.

Cost on bill This will add £24 to the average annual bill (excluding inflation) by 2030 for all those customers not on a social tariff.

For detailed stimuli shown to respondents, please see Appendix

FOR YOU. FOR LIFE. Preventing excess nitrogen and phosphorus from entering rivers and sea

Legally required

What does this mean? Large parts of the natural environment in the region have been negatively affected by too much nitrogen and phosphorus entering rivers and seas from industry, wastewater and agriculture.

What is the current situation? There is new legislation to ensure the health of rivers and coastal water environments is restored by reducing the levels of nitrogen and phosphorus.

What is the plan for this?

Restore the quality of rivers and coastal waters by preventing 1,500 tonnes of nitrogen and phosphorus from entering rivers and the sea.

- Installing nitrogen and phosphorus removal technology at Wessex Water's treatment works
- Where they can, work in partnership with farmers and landowners to prevent nitrogen and phosphorus getting washed from the land into rivers and the sea
- Creating wetland areas to naturally absorb nitrogen and phosphorus.

Cost on bill This will add £57 to the average annual bill (excluding inflation) by 2030.

FOR YOU. FOR LIFE. Reducing sewage spills

Legally required

What does this mean? When there is too much rain to handle, storm overflows allow sewage to escape into a river or the sea.

What is the current situation? Wessex Water have many storm overflows, which, when they spill, help to reduce the quality of water in rivers and the sea. Long-term targets have been set by Wessex Water to reduce the use of storm overflows.

What is the plan for this?

Wessex Water will reduce spills at 148 sites, focusing on sensitive sites to reduce the environmental impact.

How will they do it?

- Increasing storm water storage at sites
- Working with local communities to reduce the rain water entering the sewers
- Building natural solutions like wetlands to provide a form of treatment before it enters the river.

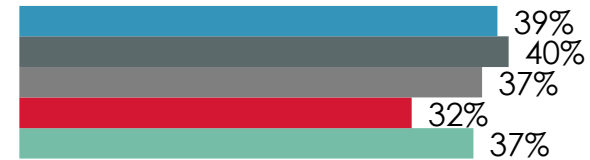
Cost on bill This will add £23 to the average annual bill (excluding inflation) by 2030.

Which of these three parts of the business plan is the most important to you: Additional Plan Components (Sewerage)

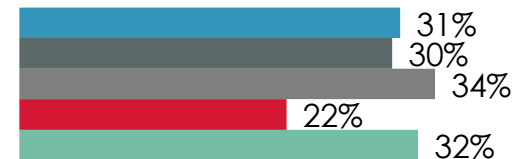
BW customers



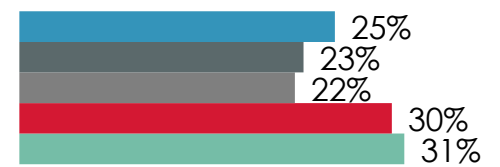
Reducing sewage spills



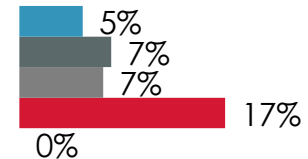
Preventing excess nitrogen and phosphorus from entering rivers and sea



Removing everyone from water poverty



Don't know/Can't say



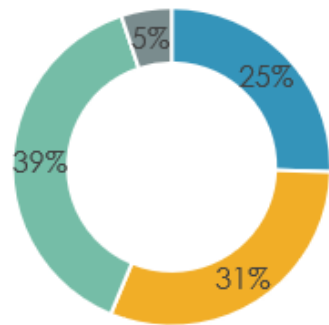
■ Total (682) ■ Household (592) ■ Vulnerable (243)
 ■ Struggling to pay (59) ■ NHH (90)

Q7d. Based on what you have just read, which of these three parts of the business plan is the most important to you?
 Base Household and Non household bill payers: Total (682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Which of these three parts of the business plan is the most important to you? Quantitative data

Additional Plan Components – Sewerage

All customers
(682)



- Removing everyone from water poverty
- Preventing excess nitrogen and phosphorous from entering rivers and sea
- Reducing sewage spills
- Don't know/Can't say



Qualitative insights based on deliberative discussions

- **Sewage spills (Legally required):** an important investment that should definitely go ahead, and could potentially be more ambitious – a big issue that is affecting waters across the UK
- However, strong feelings that this falls under the responsibility of water companies and is something they should be dealing with ASAP
- **Nutrient removal (Legally required):** urgent and important from the environmental side of things, but the cost and impact to bills is high
- Want to ensure the investment is being made for the right reasons (for the environment) and not just to build more houses and make more profit
- **Water poverty:** generally, customers support the investment in that it will help those who are struggling
- But the cross-subsidy mechanism appears risky as it could push others into water poverty
- If funding through bills, customers are inclined to choose the slowest plan option

"150 is not a lot.
How many sewers are there? They should just complete the job."
Future
Bournemouth

A close-up photograph of a person's hands interacting with a silver laptop. The left hand is pointing at the screen, while the right hand is on the trackpad. The person is wearing a black fitness tracker on their left wrist and a silver ring on their right ring finger. A semi-transparent teal banner with white text is overlaid across the center of the image.

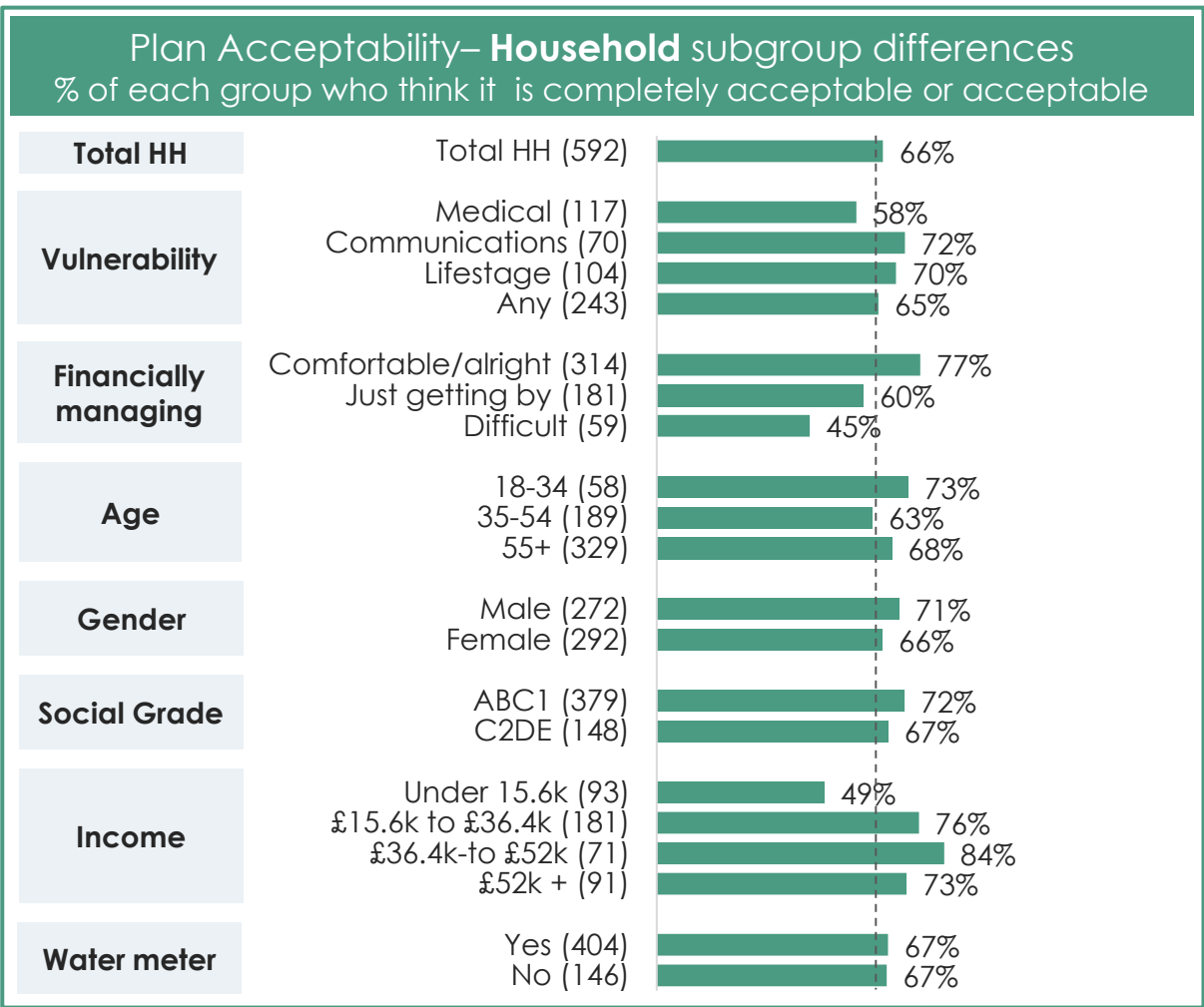
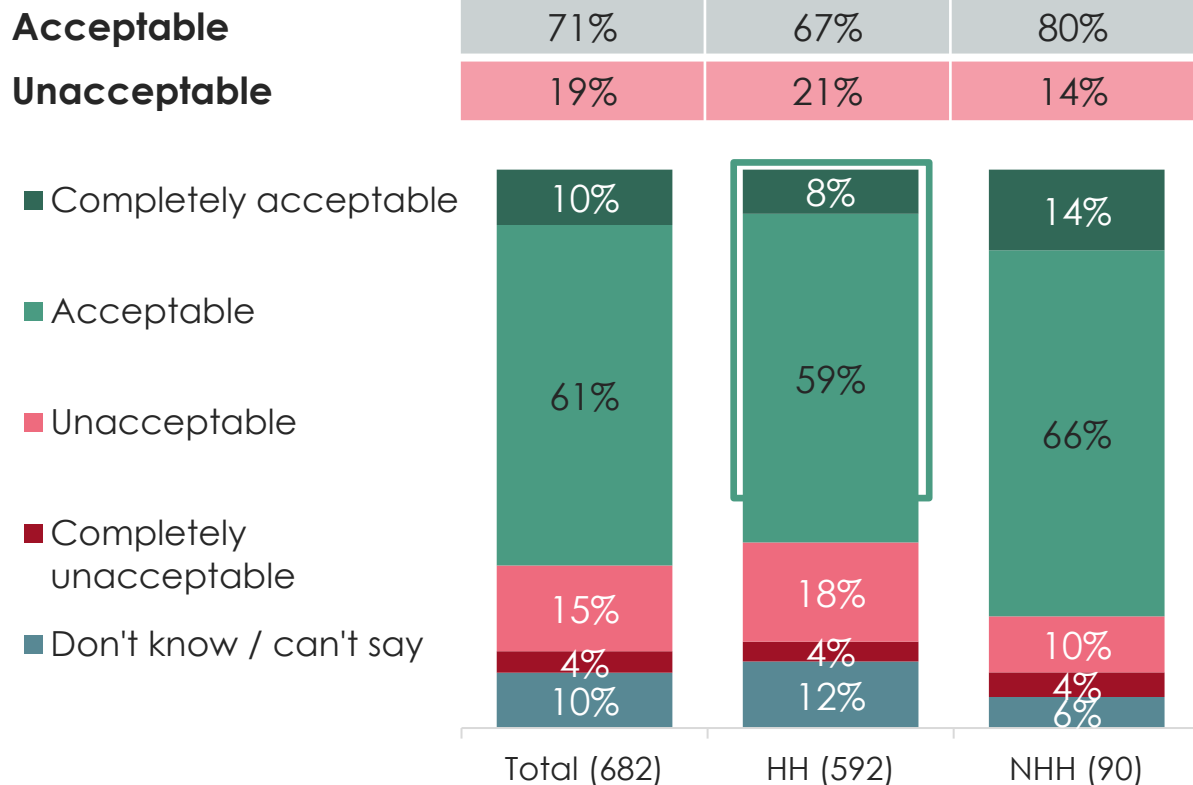
Acceptability of proposed plans

7 in 10 accept BW's overall plan – this jumps to 4 in 5 amongst NHH customers

There is not a lot of variation within the HH segments, though those in more comfortable financial situations were more likely to accept it than those in lowest income bracket.



Acceptability of plan

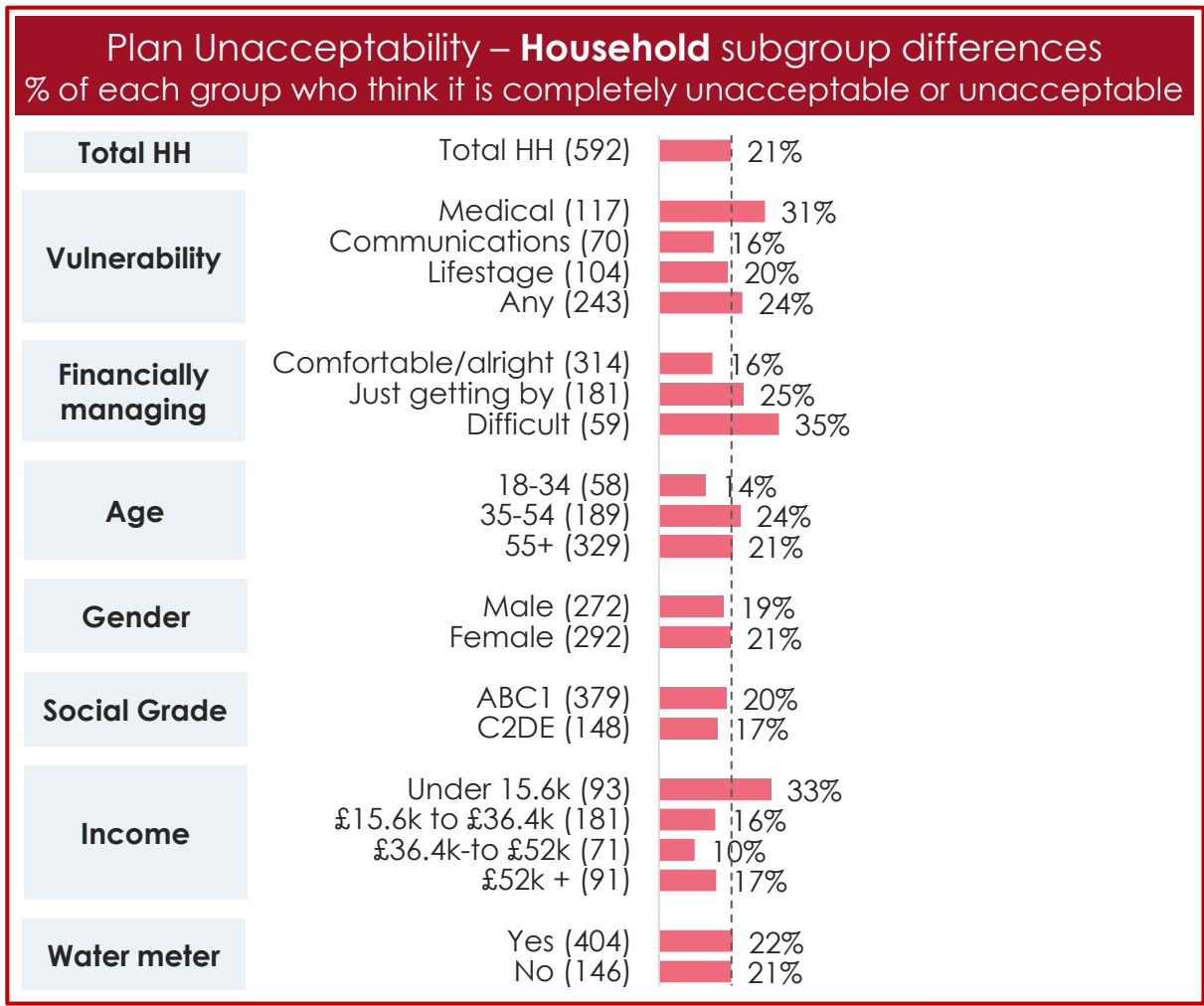
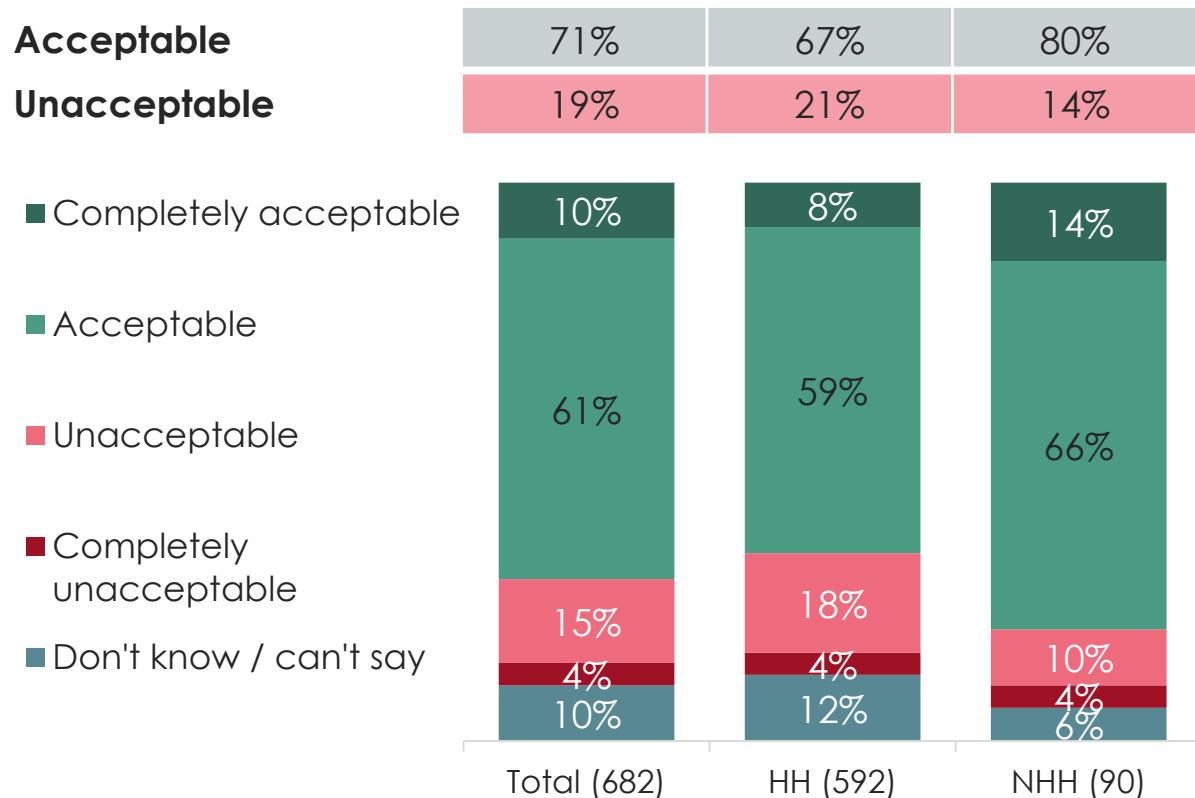


Just under a fifth feel the overall plan is unacceptable

Financial circumstance primarily drives levels of unacceptability



Acceptability of overall plan



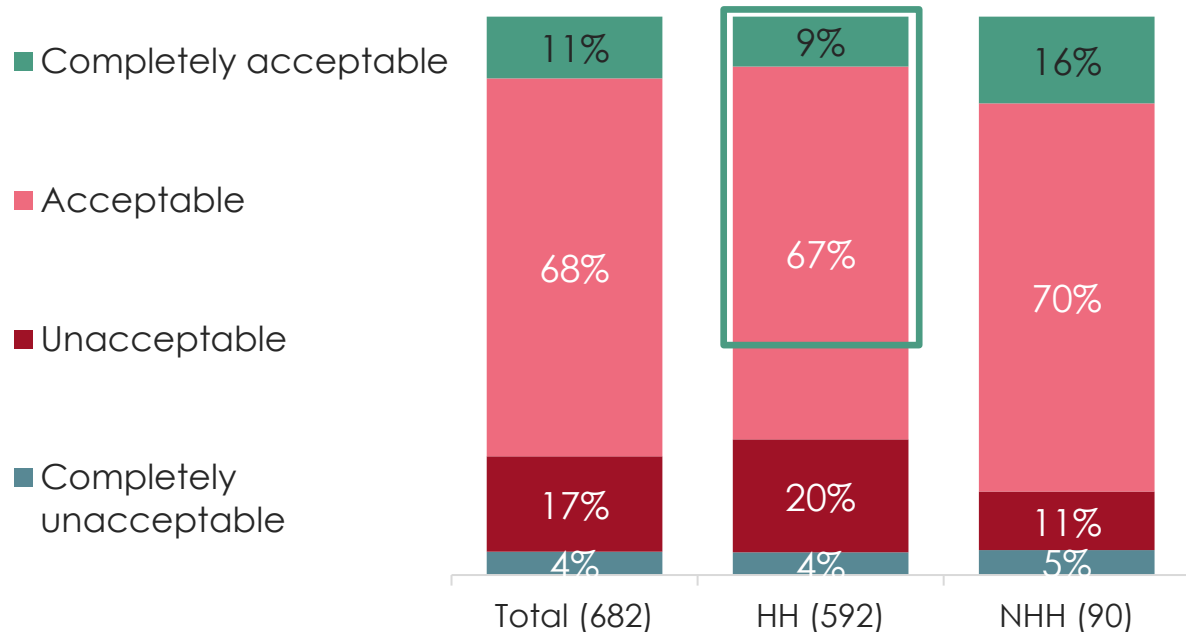
When excluding DK answers, almost 8 in 10 accept BW's overall plan

There is not a lot of variation within the HH segments, though those in more comfortable financial situations were more likely to accept it than those in lowest income bracket.



Acceptability of plan

Acceptable	79%	76%	85%
Unacceptable	21%	24%	16%



Data excluding 'don't know'

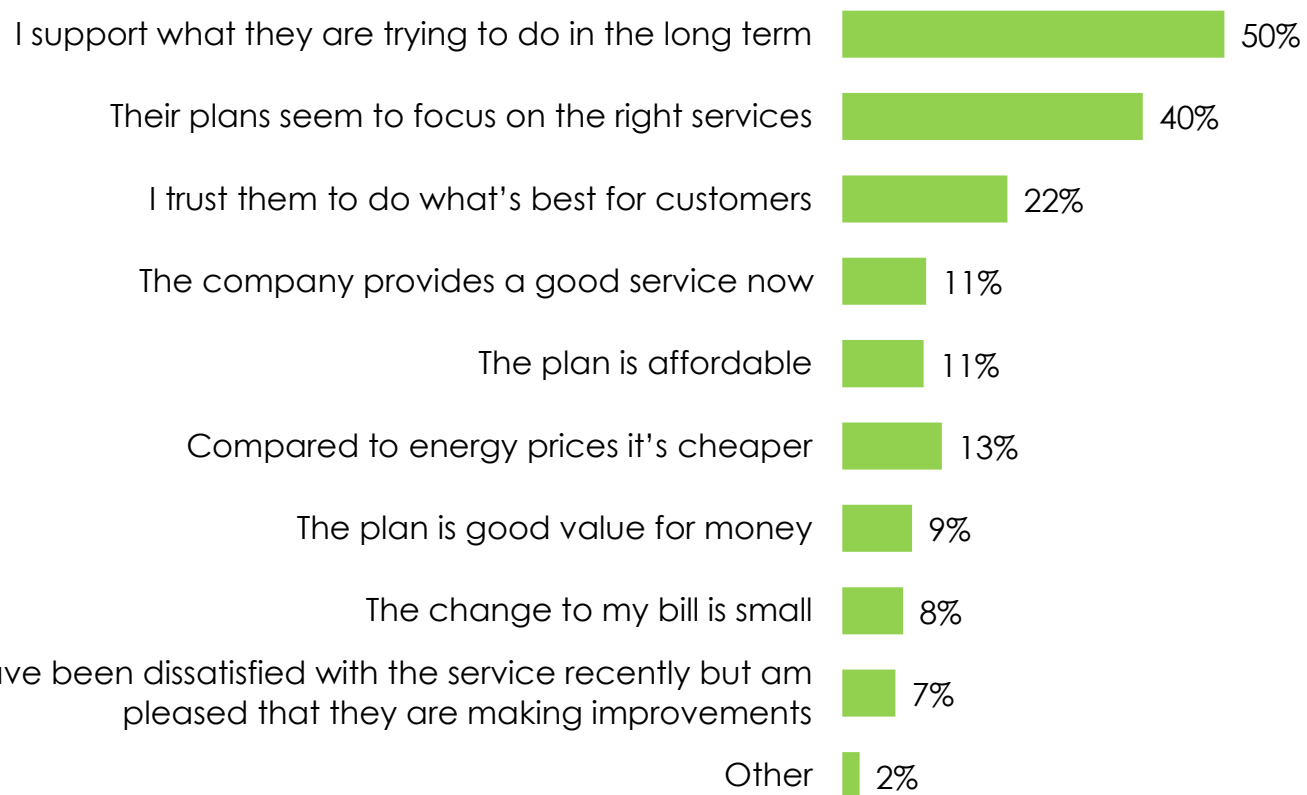
Reasons for accepting the plan were similar to those seen in the qualitative

The key reasons for accepting the plan is that it addresses the right priorities and they are aligned with the long term plan.



Reasons for accepting the plan

(Household and Non household customers who found the plans acceptable)



*"Even if it's expensive, these are where the priorities are. This is more important."
HH Bournemouth*

*"For me, my company gave me a 10% increase to account for inflation. It's scary to look at the (bill increase) numbers right now, but everything is crazy right now anyway. Water is important, so even though it looks like my bill might double, it still seems worth it."
HH Bournemouth*

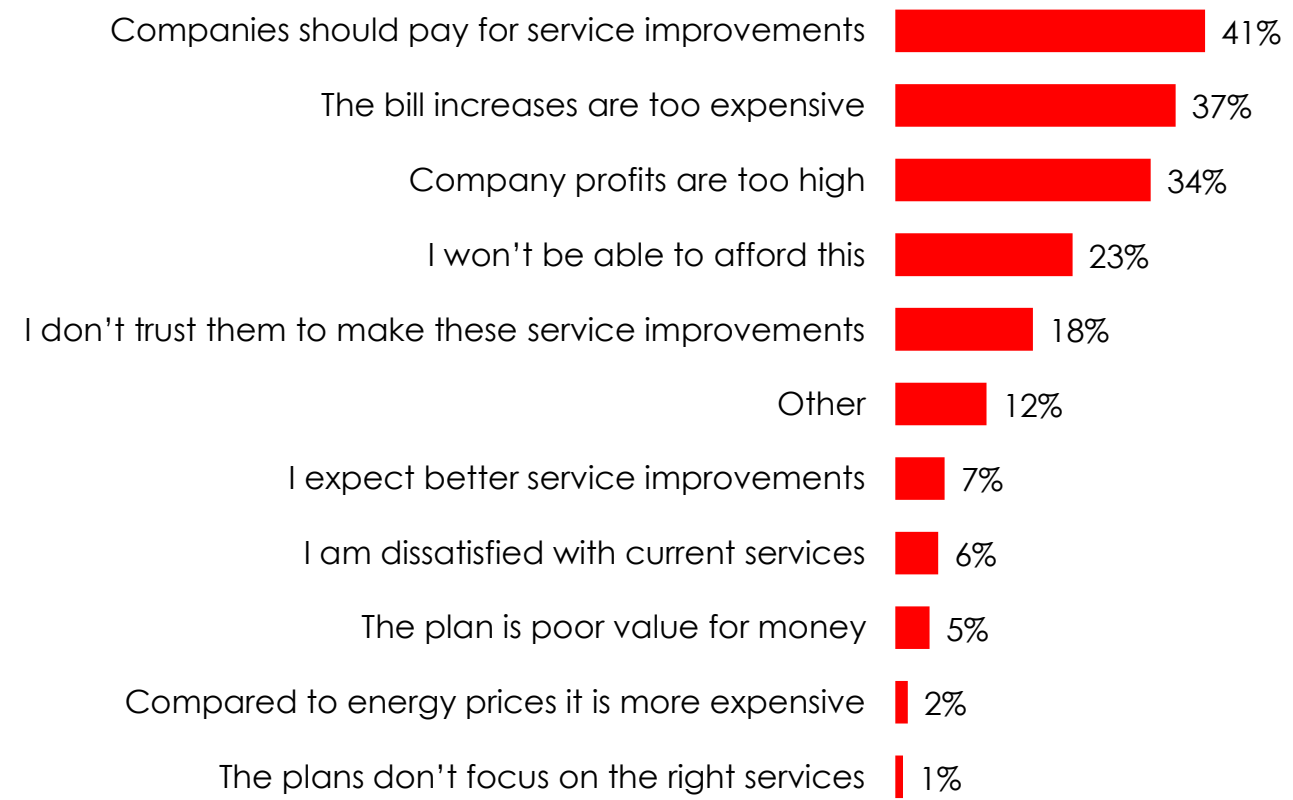
Reasons for not accepting the plan revolve around company profits and cost

Customers reject the plan on the basis that it is too expensive. A notable proportion believe that the water companies should pay for the investments and a third feel that water company profits are too high



Reasons for not accepting the plan

(Household and Non household customers who found the plans unacceptable)



*"Seems a lot because I mean my bill for last year was hundred and 80 pounds. Just add ons are going to be more than that. That doesn't seem right to me."
HH Bournemouth*

*"It's hard to know... how much pay is going to increase in time and everything like that. Hard to know. It does feel like bills going up."
HH Bournemouth*

Acceptability of proposed plan for water supply services

Focusing just on the aspects of the plans for the water supply services, 3 in 4 accept these plans. Levels of support are comparable across HH and NHH groups, but lower amongst those financially stretched (however, they are not more likely to find it unacceptable)

For detailed stimuli shown to respondents, please see Appendix

Bournemouth Water's plan for water services 2025-30

These are **key elements** of Bournemouth Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
Maintain target level for supply interruptions from 2025 to 2030	£0
Reduce leakage per property per day from 83.6 litres in 2025 to 78 in 2030	£5
Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£4
Developing new water supplies	£13
Install 350,000 smart water meters across the whole South West region	£2
Improving tap water quality	£8

£/yr means the **added amount** on to the **average current annual bill** (excluding inflation) by 2030

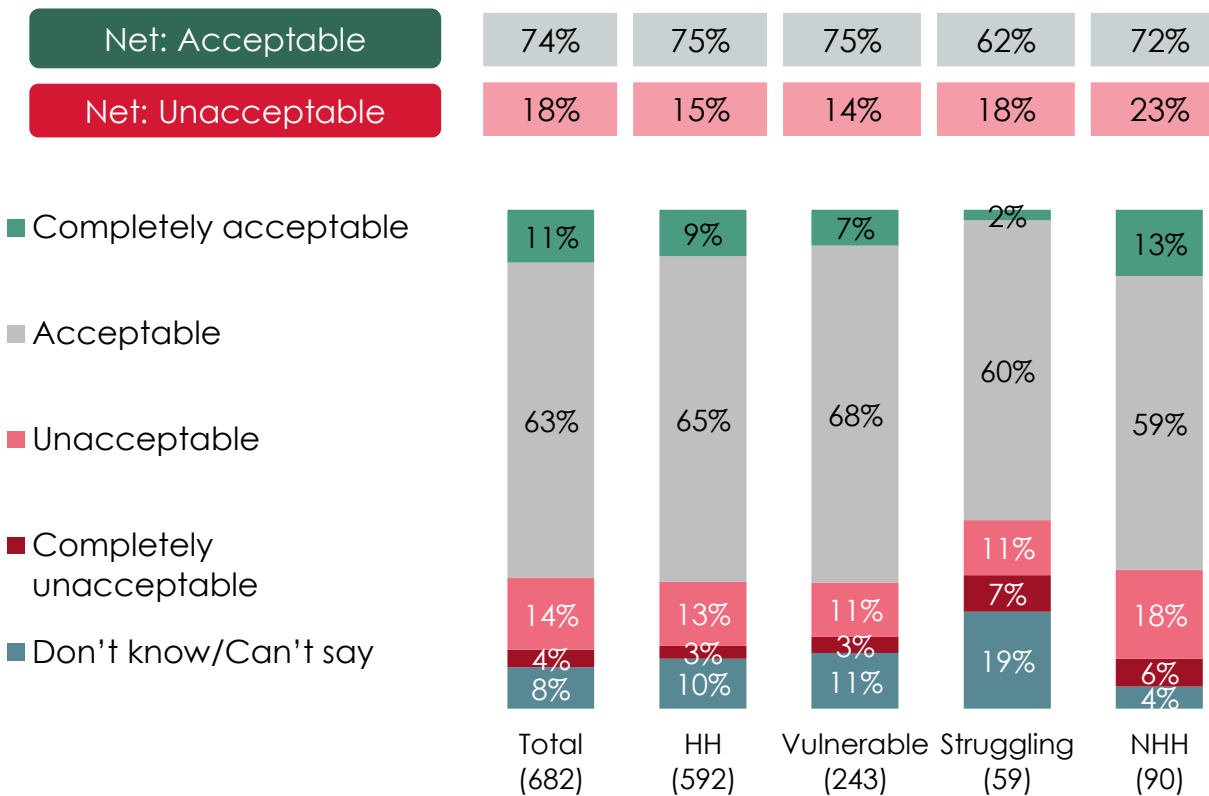
Bournemouth Water's plan for water services 2025-30

These are **key elements** of Bournemouth Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
Maintain target level for supply interruptions from 2025 to 2030	£0
Reduce leakage per property per day from 83.6 litres in 2025 to 78 in 2030	£14
Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£12
Developing new water supplies	£37
Install 350,000 smart water meters across the whole South West region	£7
Improving tap water quality	£22

£/yr means the **added amount** based on an **example annual bill of £500** today (excluding inflation) by 2030

How acceptable or unacceptable is the business plan for the water supply services?



Acceptability of proposed plan for sewerage services

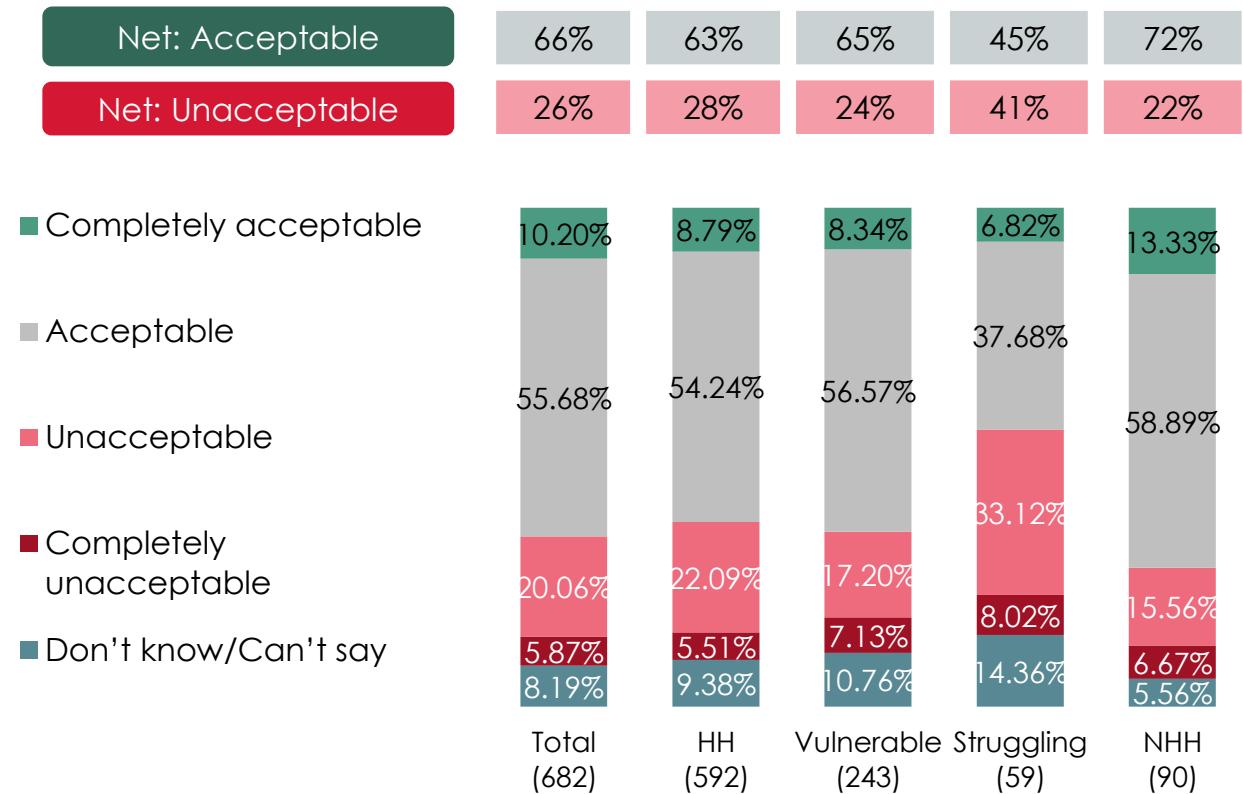
There is slightly less support for the sewerage related investments; NHH customers are more likely to be in favour of these plans. Those financially stretched are least support of the plan, with an equal proportion of this subgroup for and against the sewerage service plans.

For detailed stimuli shown to respondents, please see Appendix

Wessex Water's plan for sewerage services 2025-30	
These are key elements of Wessex Water's business plan only, and do not make up the full set of activities or costs.	
By 2030...	£/yr
Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£2
Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£2
Reduce pollution incidents from 20.6 to 15.7 per 10,000km of sewer	£5
Remove everyone from water poverty	£24
Prevent excess nitrogen and phosphorous entering rivers & sea <i>(Legally required)</i>	£57
Reduce sewage spills at 148 sites, focusing on sensitive sites <i>(Legally required)</i>	£23
£/yr means the added amount on to the average current annual bill (excluding inflation) by 2030	

Wessex Water's plan for sewerage services 2025-30	
These are key elements of Wessex Water's business plan only, and do not make up the full set of activities or costs.	
By 2030...	£/yr
Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£5
Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£5
Reduce pollution incidents from 20.6 to 15.7 per 10,000km of sewer	£12
Remove everyone from water poverty	£0
Prevent excess nitrogen and phosphorous entering rivers & sea <i>(Legally required)</i>	£137
Reduce sewage spills at 148 sites, focusing on sensitive sites <i>(Legally required)</i>	£55
£/yr means the added amount (excluding inflation) on to an example current annual bill of £1,000 by 2030.	

How acceptable or unacceptable is the business plan for the sewerage services?



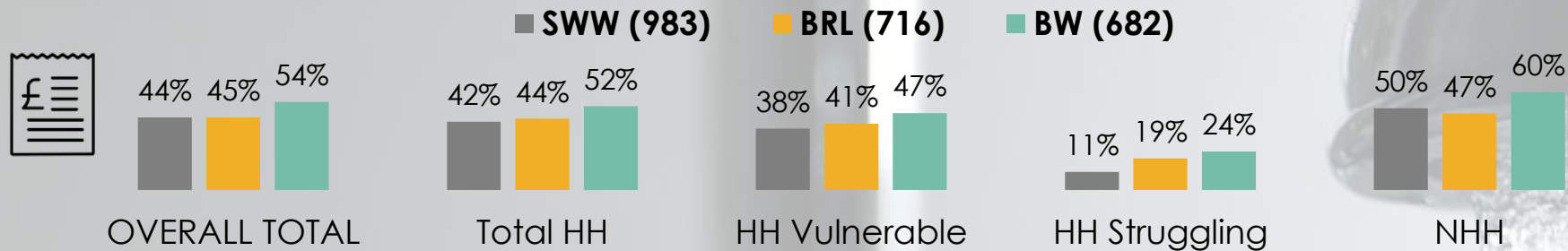
Q10b. Based on everything you have seen and read Bournemouth Water's proposed business plan for sewerage services, how acceptable or unacceptable is it to you? **Base** Household and Non household bill payers: Total (682); **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**



Summary

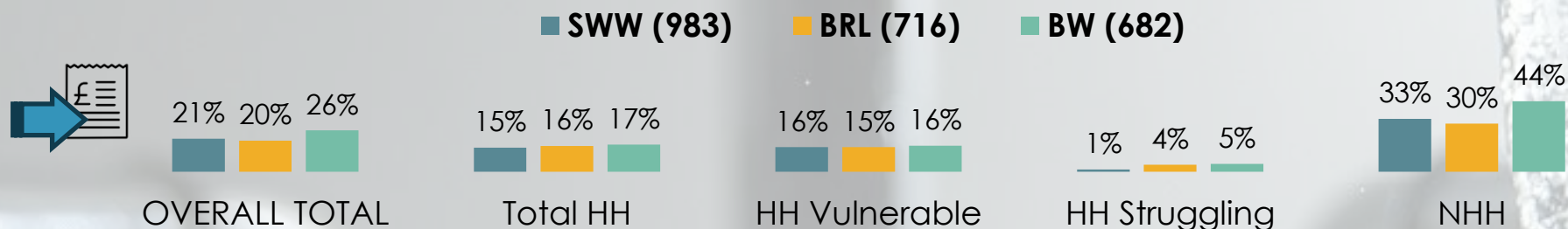
Easy to afford bill now

Easy to afford – current bill



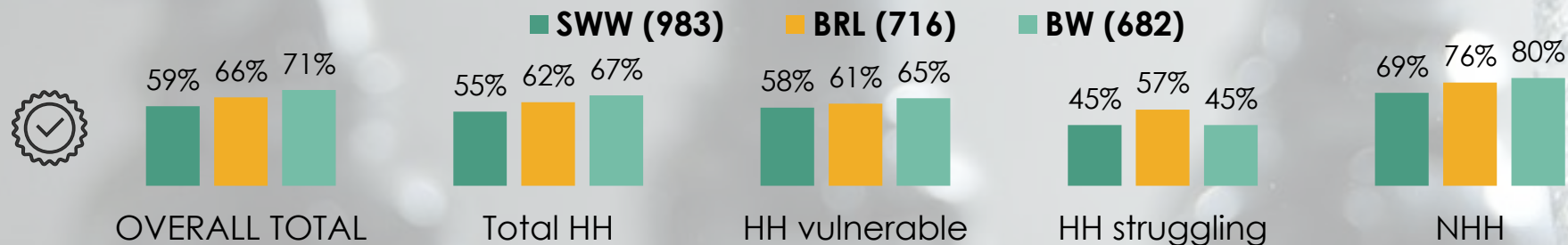
Would be easy to afford future bill

Easy to afford – future bill



Plan Acceptability

Find it acceptable



1

Across the SBB regions, customers have a similar outlook on their financial situation. Both phases of the research observed only a small proportion of customers viewing their financial circumstances as 'comfortable' and a pessimistic outlook on future finances – with a greater number of customers anticipating their situation deteriorating, as opposed to improving over the next few years.

2

Despite the financial squeeze customers feel, only a small proportion say they find it difficult to afford their current water and sewerage bill. However, a significant proportion of customers say they think it would be difficult to afford the proposed future bills. Customers were surprised by the extent of the bill increases when the proposed bill profiles were presented at the qualitative stage. This is consistent across SWW, BRL and BW.

3

Levels of acceptability of the proposed business plans are mixed (SWW: 56%; BRL: 71%; BW: 66%) with SWW gaining the least support and BRL having the highest level of customer endorsement for the proposed Business Plan. Across the three water companies, the water supply investments gained more support than sewerage related investments. NHH customers are more likely to find the overall plans acceptable.

4

Those who accept the proposed business plans feel the plan is aligned to their priorities and agree with the long-term ambitions, with customers across the regions rating pollution related issues and improving tap water through upgrading treatment works and lead pipes as the most important components for their water companies to address.

5

Despite the many feeling they cannot afford the proposed future bills; affordability is not the key reason for rejecting the proposed business plans. The qualitative research reveals that levels of affordability, to a certain extent, reflects a reluctance to pay for investments, as opposed to an inability to afford them. This seems to be echoed in the quantitative survey which shows that across the board, customers feel that water companies should be paying for these investments and that water companies' profits are perceived to be too high, particularly for SWW, with almost half of rejectors citing this as their main reason for rejecting the SWW business plan.

A photograph of two people in a meeting. One person, wearing a blue shirt and a black watch, is pointing with a black pen at a document on a table. The other person, wearing a black and white striped shirt, is looking at the document. The table is covered with various data visualization charts, including bar graphs, line graphs, and infographics. A semi-transparent blue banner is overlaid across the middle of the image, containing the word "Appendices" in white text. The background is slightly blurred, showing a checkered pattern.

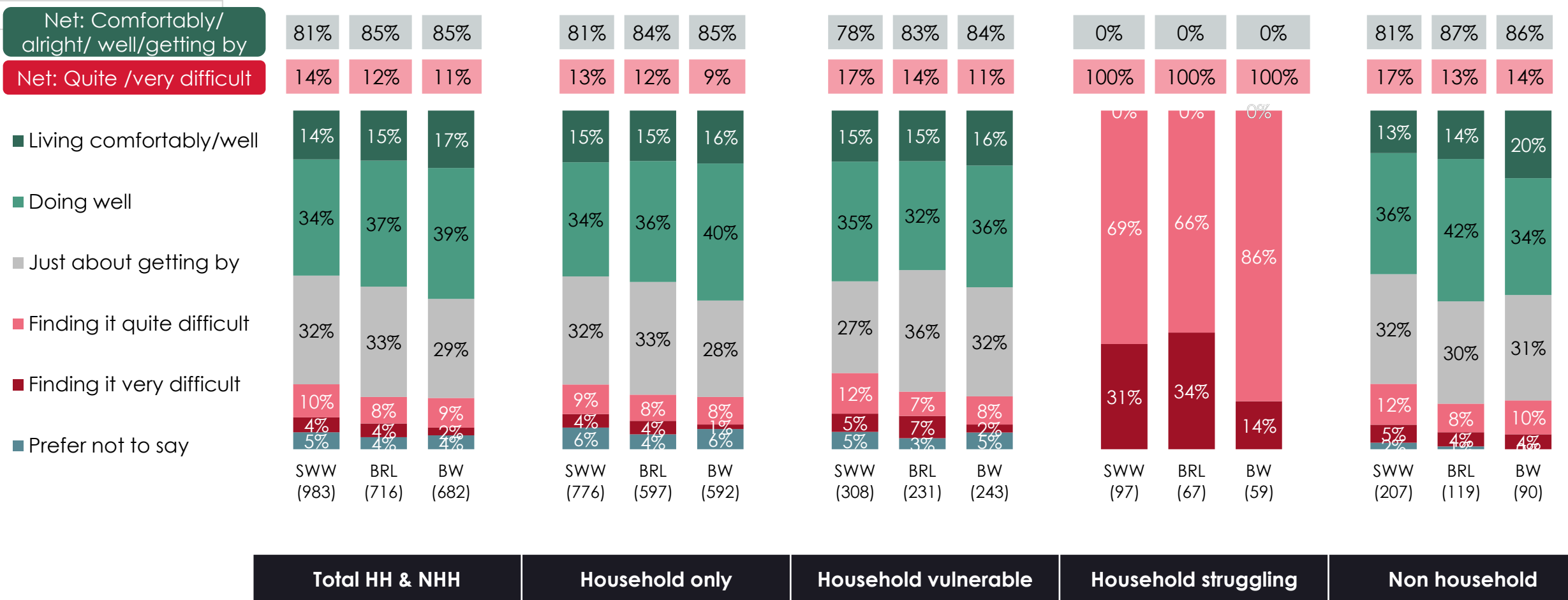
Appendices



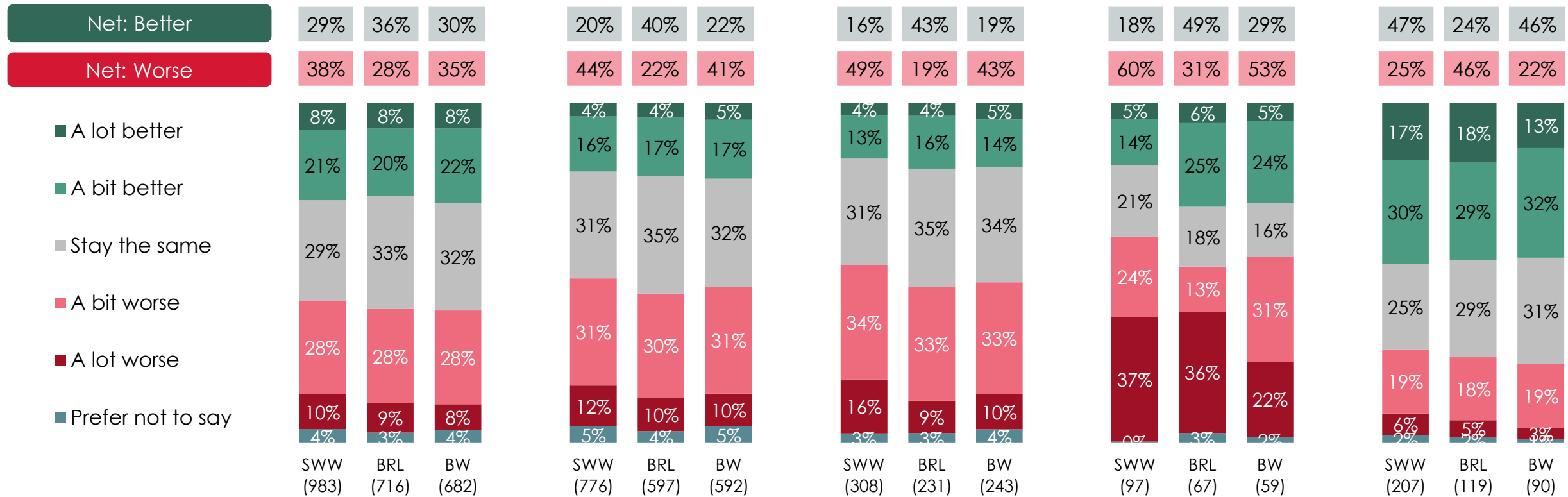
Appendix 1 – Full breakdown of results – South West Water



How well managing financially now?



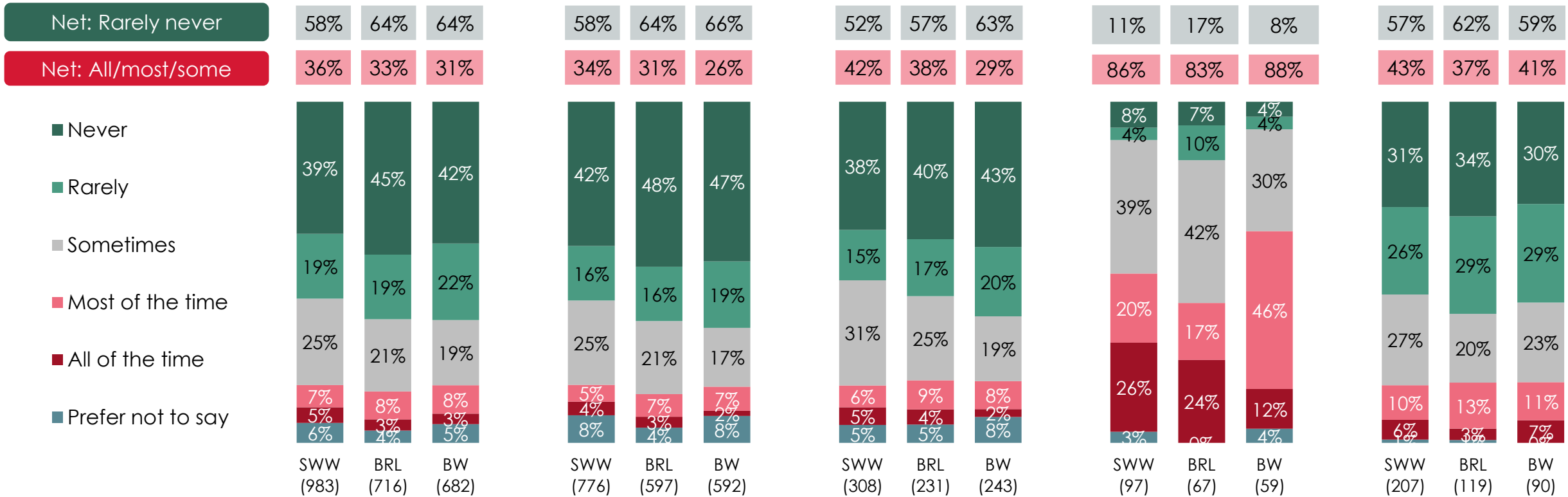
Expect financial situation to get...?



Total HH & NHH **Household only** **Household vulnerable** **Household struggling** **Non household**

Q3. Thinking about your household's/organisation's financial situation over the next few years up to 2030, do you expect it to get:
Base Base Household and Non household bill payers: Total SWW(983) BRL (716) Bournemouth water (682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

How often do you struggle to pay your bills in the last year?

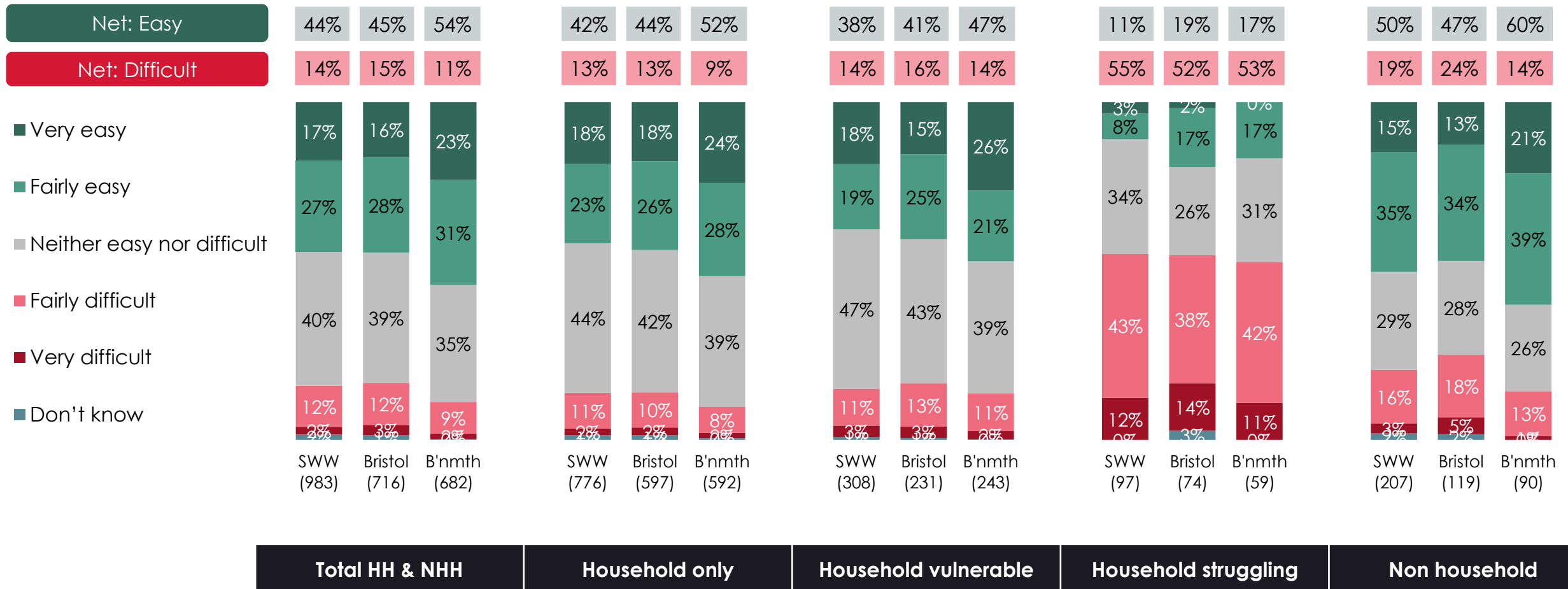


Total HH & NHH	Household only	Household vulnerable	Household struggling	Non household
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Q1. Thinking about your household's /organisation's finances over the last year, how often, if at all, have you struggled to pay at least one of your household/ it's bills? **Base** Household and Non household bill payers: Total SWW(983) BRL (716) BW(682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**



How easy or difficult is it to afford to pay current water and sewerage bill?



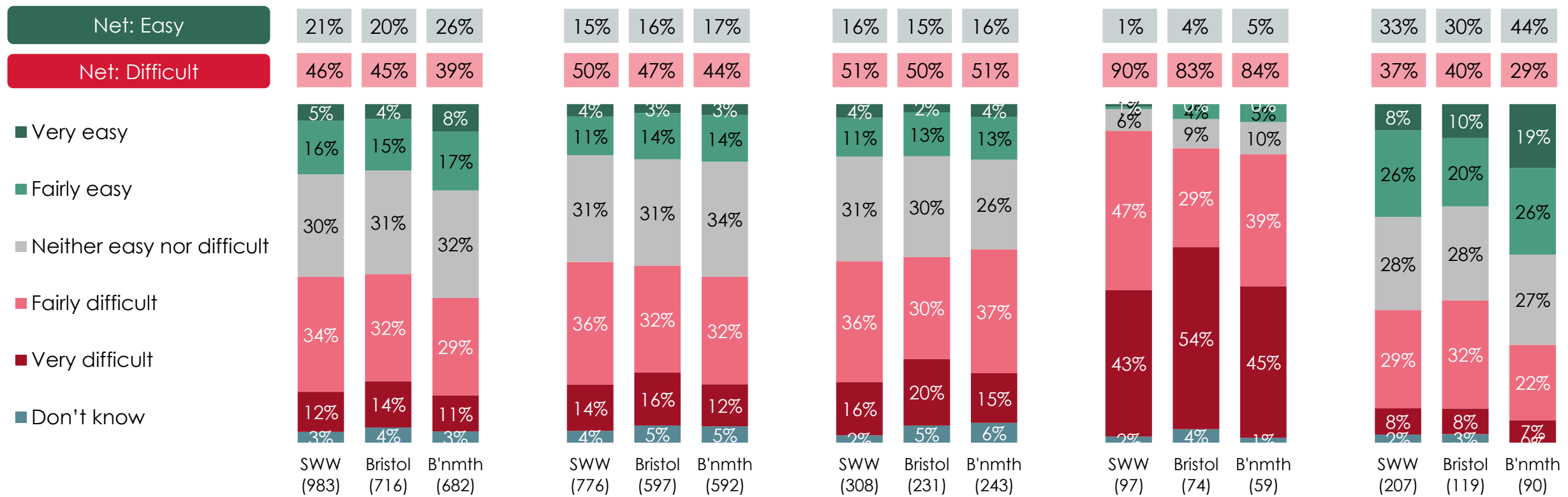
Q4. How easy or difficult is it for you to afford to pay your/your organisation current water and sewerage bill?

Base Household and Non household bill payers: Total SWW (983) BRL (716) BW (682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Future bill affordability based on bill impact



How easy or difficult do you think it would be to afford these water and sewerage bills?



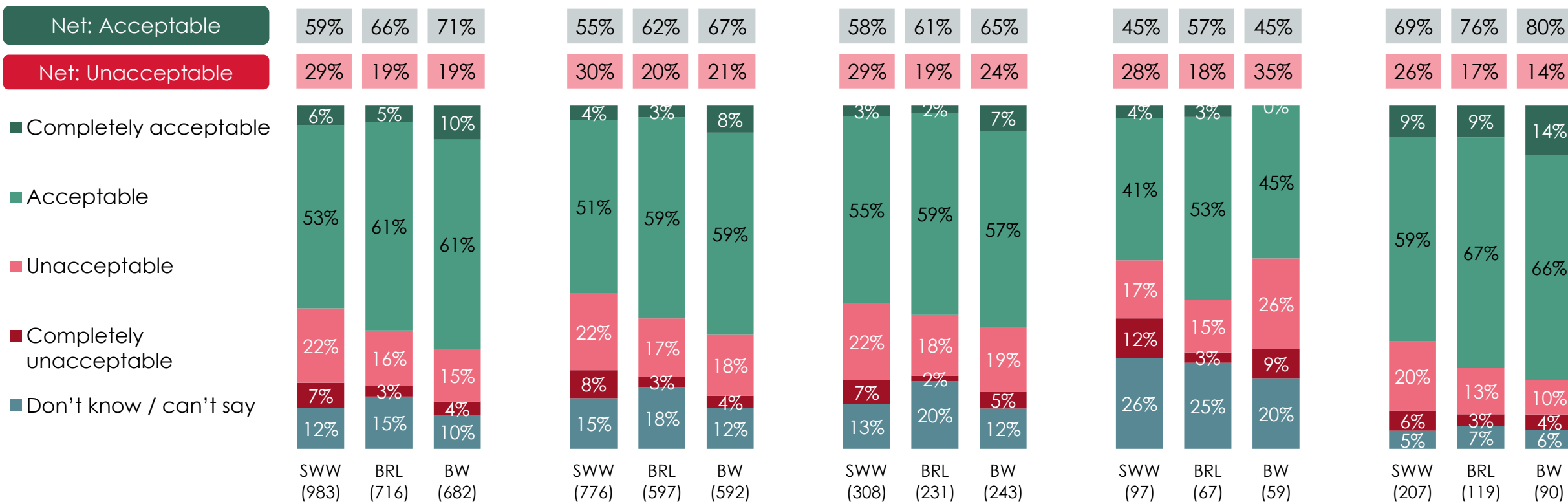
Total HH & NHH **Household only** **Household vulnerable** **Household struggling** **Non household**

Q5. How easy or difficult do you think it would be for you to afford these water and sewerage bills?
Base Household and Non household bill payers: Total SWW(983) BRL (716) BW(682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

Acceptability of overall plan



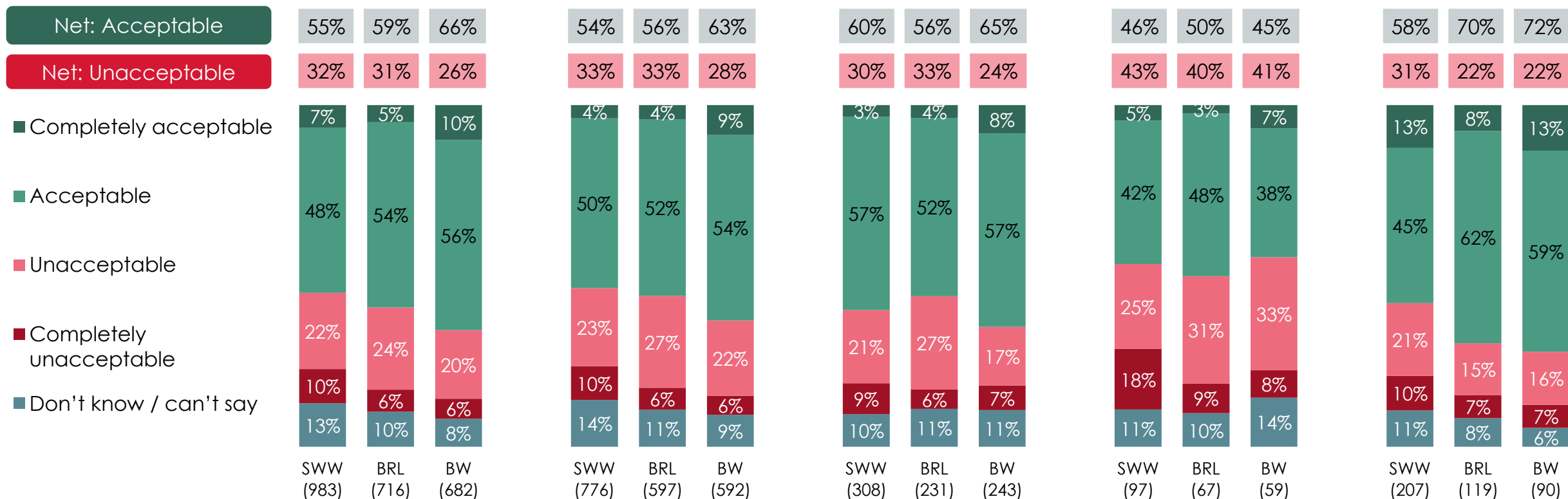
How acceptable is the overall plan?



Total HH & NHH	Household only	Household vulnerable	Household struggling	Non household
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Q8. Based on everything you have seen and read about XXX proposed business plan, how acceptable or unacceptable is it to you?
Base Household and Non household bill payers: Total SWW(983) BRL (716) BW(682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

How acceptable or unacceptable is the business plan for the sewerage services?



Total HH & NHH	Household only	Household vulnerable	Household struggling	Non household
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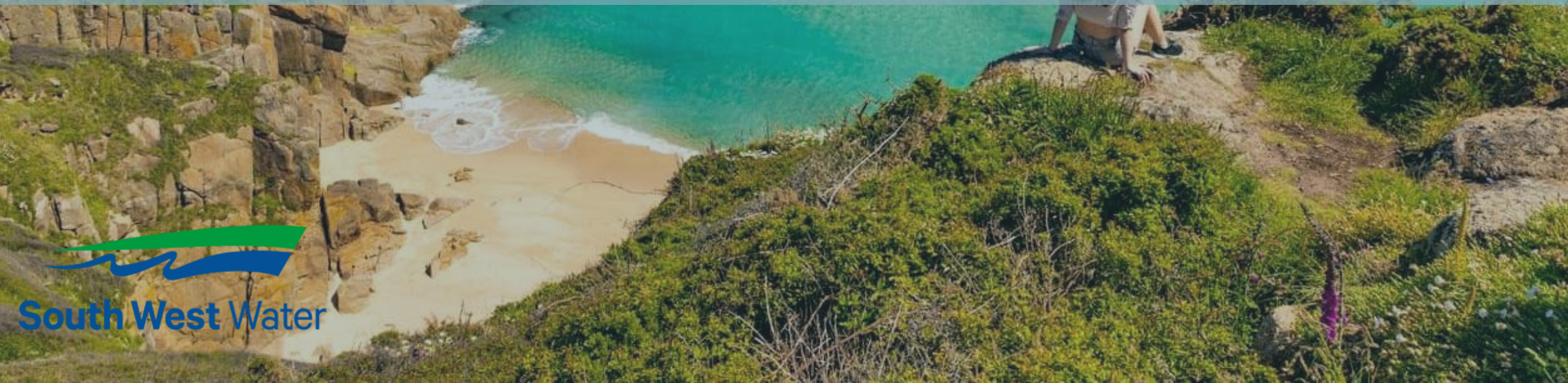
Q10b. Based on everything you have seen and read XXX Water's proposed business plan for sewerage services, how acceptable or unacceptable is it to you? **Base** Household and Non household bill payers: Total SWW(983) BRL (716) BW(682). **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**

A photograph showing two people in a meeting. One person, wearing a blue shirt and a black watch, is pointing at a document with a black pen. The other person, wearing a black and white striped shirt, is looking at the document. The document contains various data visualizations, including bar charts, pie charts, and infographics. A semi-transparent blue banner is overlaid across the middle of the image, containing the text 'Appendix 2 – Survey stimuli'.

Appendix 2 – Survey stimuli



South West Water



South West Water

STIM 1A_SWW_HH



Water supply interruptions, lasting longer than 3 hours



What does this mean? It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected.

How are South West Water performing on this?
Water companies are measured on the length of time properties are without water. The measure used is the duration without water for more than 3 hours by minutes per property.
South West Water's performance on this measure is currently 13 mins 40 seconds.
South West Water did not meet their target for this metric last year.

What is the plan for this?

Benefit by 2030	Achieve the target level for supply interruptions by 2025 and then maintain this level up to 2030.
How will they do it?	<ul style="list-style-type: none"> Repair water pipes. Replace the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.

STIM 1A_SWW_NHH



Water supply interruptions, lasting longer than 3 hours



What does this mean? It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected.

How are South West Water performing on this?
Water companies are measured on the length of time properties are without water. The measure used is the duration without water for more than 3 hours by minutes per property.
South West Water's performance on this measure is currently 13 mins 40 seconds.
South West Water did not meet their target for this metric last year.

What is the plan for this?

Benefit by 2030	Achieve the target level for supply interruptions by 2025 and then maintain this level up to 2030.
How will they do it?	<ul style="list-style-type: none"> Repair water pipes. Replace the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.

STIM 1B_SWW_HH and NHH

How do water companies perform on the length of time properties are without water?




The measure used is the duration without water for more than 3 hours by minutes per property.
Companies with the *lowest* numbers perform best for this service.

South West Water perform 14th out of 17 companies overall on this measure:

	min:sec	
Portsmouth Water	02:21	<p>Better performance</p> <p>Worse performance</p>
Bristol Water	02:31	
SES Water	02:58	
SSC	03:15	
Affinity Water	03:43	
Wessex Water	04:12	
United Utilities Water	07:58	
Southern Water	09:22	
Anglian Water	09:48	
Yorkshire Water	10:38	
Thames Water	11:03	
Northumbrian Water	11:45	
Severn Trent Water	12:39	
South West Water	13:40	
Dwr Cymru	16:12	
Hafren Dyfrdwy	37:28	
South East Water	72:33	

STIM 2A_SWW_HH



Reducing leaks


What does this mean? Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

How are South West Water performing on this? Water companies are measured on the amount of water lost due to leaks from water mains and pipes. The measure used is annual leakage per property served (litres per day). South West Water's annual leakage currently stands at 108 litres per property per day. **South West Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce leakage from 103 litres per property per day in 2025 to 78 litres in 2030 and so reduce the amount of water South West Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> • Repair leaks when they find them. • Replace old water mains. • Help customers to replace their leaky pipes too.
Cost on bill	This will add £7 to the average annual bill (excluding inflation) by 2030.

STIM 2A_SWW_NHH



Reducing leaks

What does this mean? Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

How are South West Water performing on this? Water companies are measured on the amount of water lost due to leaks from water mains and pipes. The measure used is annual leakage per property served (litres per day). South West Water's annual leakage currently stands at 108 litres per property per day. **South West Water met their target for this metric last year.**

What is the plan for this?



Benefit by 2030	Reduce leakage from 103 litres per property per day in 2025 to 78 litres in 2030 and so reduce the amount of water South West Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> • Repair leaks when they find them. • Replace old water mains. • Help customers to replace their leaky pipes too.
Cost on bill	Based on an example annual bill of £1000 today, this will add £9 to the annual bill by 2030 (excluding inflation).

STIM 2B_SWW_HH and NHH


How do water companies perform on the amount of water lost due to leaks from water mains and pipes?


The measure used is annual leakage per property served (litres per day).
Companies with the lowest numbers perform best for this service.

South West Water perform 10th out of 19 companies overall on this measure:

	Litres / day	
Bristol Water	65.0	Better performance 
Essex and Suffolk	76.4	
Portsmouth Water	77.0	
SES Water	78.7	
Anglian Water	80.2	
Southern Water	83.2	
South East Water	87.6	
Cambridge Water	90.7	
Wessex Water	103.3	
South West Water	107.7	
Northumbrian Water	108.3	Worse performance 
Affinity Water	108.7	
Dwr Cymru	112.3	
South Staffs Water	113.5	
Severn Trent Water	119.7	
Yorkshire Water	122.9	
United Utilities Water	124.2	
Hafren Dyfrdwy	131.0	
Thames Water	151.5	

STIM 3A_SWW_HH



The appearance, taste and smell of tap water 


What does this mean? Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.


How are South West Water performing on this? Water companies are measured on the number of customer contacts received regarding the appearance, taste and smell of tap water. The measure used is the number of customer contacts regarding incidents, per 1,000 population. South West Water currently receives 1.55 contacts per 1,000 population in the area (this is a total of c.3,000 contacts per year). **South West Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce the number of contacts about appearance, taste and smell of tap water from 1.33 per 1,000 population in 2025 to 1.10 per 1,000 population in 2030.
How will they do it?	<ul style="list-style-type: none"> Replace cast iron mains which can cause a brown tinge to tap water
Cost on bill	This will add £6 to the average annual bill (excluding inflation) by 2030.

STIM 3A_SWW_NHH



The appearance, taste and smell of tap water 


What does this mean? Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

How are South West Water performing on this? Water companies are measured on the number of customer contacts received regarding the appearance, taste and smell of tap water. The measure used is the number of customer contacts regarding incidents, per 1,000 population. South West Water currently receives 1.55 contacts per 1,000 population in the area (this is a total of c.3,000 contacts per year). **South West Water met their target for this metric last year.**

What is the plan for this?



Benefit by 2030	Reduce the number of contacts about appearance, taste and smell of tap water from 1.33 per 1,000 population in 2025 to 1.10 per 1,000 population in 2030.
How will they do it?	<ul style="list-style-type: none"> Replace cast iron mains which can cause a brown tinge to tap water
Cost on bill	Based on an example annual bill of £1000 today, this will add £8 to the annual bill by 2030 (excluding inflation).

STIM 3B_SWW_HH & NHH


How do water companies perform on number of customer contacts received regarding appearance, taste and smell of tap water? 

The measure used is the number of customer contacts regarding incidents, per 1,000 population. **Companies with the lowest numbers perform best for this service.**


South West Water perform 14th out of 17 companies overall on this measure:

	Contacts per 1,000 population	
Portsmouth Water	0.41	 Better performance
Thames Water	0.49	
SES Water	0.58	
Affinity Water	0.73	
SSC	0.76	
Severn Trent Water	0.93	
Northumbrian Water	0.97	
Anglian Water	1.03	
Yorkshire Water	1.09	
Southern Water	1.1	
Wessex Water	1.17	
South East Water	1.34	
Bristol Water	1.38	
South West Water	1.55	
Hafren Dyfrdwy	1.71	
United Utilities Water	1.79	
Dwr Cymru	2.38	
		 Worse performance

STIM 7A_SWW_HH



Sewage flooding of properties – internal




What does this mean? An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

How are South West Water performing on this? Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. South West Water currently has 0.76 incidents of internal sewer flooding per 10,000 connections. **South West Water met their target for this metric last year.**


What is the plan for this?

Benefit by 2030	Continue meeting target for the number of properties affected by internal sewage flooding, per 10,000.
How will they do it?	South West Water will continue to meet the target despite a growing population and more intensive rainfall. <ul style="list-style-type: none"> • They will increase sewer capacity through sewer upsizing and more storage tanks for wastewater • This stops rainwater from getting into sewers where possible.
Cost on bill	This will add £4 to the average annual bill (excluding inflation) by 2030.

STIM 7A_SWW_NHH



Sewage flooding of properties – internal




What does this mean? An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

How are South West Water performing on this? Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. South West Water currently has 0.76 incidents of internal sewer flooding per 10,000 connections. **South West Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Continue meeting target for the number of properties affected by internal sewage flooding, per 10,000.
How will they do it?	South West Water will continue to meet the target despite a growing population and more intensive rainfall. <ul style="list-style-type: none"> • They will increase sewer capacity through sewer upsizing and more storage tanks for wastewater • This stops rainwater from getting into sewers where possible.
Cost on bill	Based on an example annual bill of £1000 today, this will add £6 to the annual bill by 2030 (excluding inflation).

STIM 7B_SWW_HH and NHH


How do water companies perform on the incidents of sewage flooding inside properties? 

The measure used is the number of properties affected by sewage flooding, per 10,000. **Companies with the lowest numbers perform best for this service.**


South West Water perform 1st out of 11 companies overall on this measure:

	No. properties affected per 1,000	
South West Water	0.76	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;">↑ Better performance</div> <div style="margin-top: 10px;">↓ Worse performance</div> </div>
Dwr Cymru	1.36	
Wessex Water	1.42	
Severn Trent Water	1.61	
Anglian Water	1.73	
Northumbrian Water	1.84	
Hafren Dyfrdwy	2.34	
Yorkshire Water	2.83	
United Utilities	2.97	
Southern Water	3.04	
Thames Water	3.46	

Only the companies that provide sewerage services are included in this comparison



Sewage flooding of properties - external




What does this mean? An escape of sewage into gardens or access points to peoples' properties is inconvenient and unpleasant and can restrict access.


How are South West Water performing on this? Water companies are measured on the incidents of sewage flooding gardens or outbuildings. The measure used is the number of properties affected, per 10,000. South West Water currently has 18 incidents of external sewer flooding per 10,000 connections. **South West Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Maintain external flooding at 2025 target levels at 14 incidents per 10,000 connections
How will they do it?	<ul style="list-style-type: none"> South West Water will improve performance from today's level and maintain the 2025 target level despite a growing population and more intensive rainfall South West Water will increase sewer capacity through sewer upsizing and more storage tanks for wastewater This will stop rainwater from getting into sewers where possible.
Cost on bill	This will add £6 to the average annual bill (excluding inflation) by 2030.



Sewage flooding of properties - external



What does this mean? An escape of sewage into gardens or access points to peoples' properties is inconvenient and unpleasant and can restrict access.

How are South West Water performing on this? Water companies are measured on the incidents of sewage flooding gardens or outbuildings. The measure used is the number of properties affected, per 10,000. South West Water currently has 18 incidents of external sewer flooding per 10,000 connections. **South West Water met their target for this metric last year.**


What is the plan for this?

Benefit by 2030	Maintain external flooding at 2025 target levels at 14 incidents per 10,000 connections
How will they do it?	<ul style="list-style-type: none"> South West Water will improve performance from today's level and maintain the 2025 target level despite a growing population and more intensive rainfall South West Water will increase sewer capacity through sewer upsizing and more storage tanks for wastewater This will stop rainwater from getting into sewers where possible.
Cost on bill	Based on an example annual bill of £1000 today, this will add £9 to the annual bill by 2030 (excluding inflation).

How do water companies perform on the incidents of sewage flooding gardens or outbuildings?

The measure used is the number of properties affected by sewage flooding gardens or outbuildings, per 10,000.


Companies with the lowest numbers perform best for this service.




South West Water perform **5th out of 11** companies overall on this measure:

	No. properties affected per 1,000	
Thames Water	9.4	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;">Better performance</div> <div style="margin-bottom: 10px;">↑</div> <div style="margin-bottom: 10px;">↓</div> <div style="margin-bottom: 10px;">Worse performance</div> </div>
Severn Trent Water	10.8	
Anglian Water	14.6	
United Utilities	18.1	
South West Water	18.1	
Hafren Dyfrdwy	19.1	
Wessex Water	19.2	
Yorkshire Water	19.5	
Southern Water	19.5	
Dwr Cymru	26.3	
Northumbrian Water	26.6	

Only the companies that provide sewerage services are included in this comparison



Pollution of rivers and bathing waters




What does this mean? Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale.


How are South West Water performing on this? Water companies are measured on the number of incidents of pollution of rivers and streams. The measure used is number of incidents per 10,000km of sewer. South West Water currently has 86.6 pollution incidents per 10,000km of sewer. **South West Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6 per 10,000km of sewer in 2030; reduce serious pollution incidents to zero.
How will they do it?	<ul style="list-style-type: none"> Enhance sewer maintenance programme to reduce sewer collapses and blockages – which often cause pollution Increase their ability to cope with more intensive rainfall, to prevent pollution and protect the environment.
Cost on bill	This will add £10 to the average annual bill (excluding inflation) by 2030.



Pollution of rivers and bathing waters



What does this mean? Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale.


How are South West Water performing on this? Water companies are measured on the number of incidents of pollution of rivers and streams. The measure used is number of incidents per 10,000km of sewer. South West Water currently has 86.6 pollution incidents per 10,000km of sewer. **South West Water did not meet their target for this metric last year.**

What is the plan for this?



Benefit by 2030	Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6 per 10,000km of sewer in 2030; reduce serious pollution incidents to zero.
How will they do it?	<ul style="list-style-type: none"> Enhance sewer maintenance programme to reduce sewer collapses and blockages – which often cause pollution Increase their ability to cope with more intensive rainfall, to prevent pollution and protect the environment.
Cost on bill	Based on an example annual bill of £1000 today, this will add £14 to the annual bill by 2030 (excluding inflation).

How do water companies perform on the number of incidents of pollution of rivers and streams?


The measure used is the number of incidents per 10,000km of sewer. **Companies with the *lowest* numbers perform best for this service.**




South West Water perform **10th out of 11** companies overall on this measure:

	No. incidents per 10,000km of sewer	
United Utilities Water	17.7	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;">Better performance</div>   <div style="margin-top: 10px;">Worse performance</div> </div>
Wessex Water	20.6	
Severn Trent Water	21.8	
Dwr Cymru	22.9	
Northumbrian Water	23.0	
Thames Water	24.9	
Yorkshire Water	27.4	
Anglian Water	33.8	
Hafren Dyfrdwy	39.8	
South West Water	86.6	
Southern Water	93.6	

Only the companies that provide sewerage services are included in this comparison



Developing new and more flexible water supplies




What is this? Investing in new supplies of water such as reservoirs and increasing the capacity to treat this water. Investing in large pipes to move water around the region more flexibly.


What is the current situation? Climate change and growing population mean that in future there will be greater pressure on sources of water, and more water will need to be taken (or 'abstracted') from environmentally sensitive sites .

What is the plan for this?

Benefit by 2030	Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.
How will they do it?	<ul style="list-style-type: none"> Develop a new reservoir from a disused quarry. Develop new groundwater sources. Increase water treatment capacity. Build a new water re-use plant to recycle wastewater into clean water. Start to build a major new regional reservoir in the Mendip Hills.
Cost on bill	This will add £17 to the average annual bill (excluding inflation) by 2030.



Developing new and more flexible water supplies





What is this? Investing in new supplies of water such as reservoirs and increasing the capacity to treat this water. Investing in large pipes to move water around the region more flexibly.

What is the current situation? Climate change and growing population mean that in future there will be greater pressure on sources of water, and more water will need to be taken ('abstracted') from environmentally sensitive sites .

What is the plan for this?

Benefit by 2030	Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.
How will they do it?	<ul style="list-style-type: none"> Develop a new reservoir from a disused quarry. Develop new groundwater sources. Increase water treatment capacity. Build a new water re-use plant to recycle wastewater into clean water. Start to build a major new regional reservoir in the Mendip Hills.
Cost on bill	Based on an example annual bill of £1000 today, this will add £24 to the annual bill by 2030 (excluding inflation).



 **Installing smart water meters** 

What does this mean? Smart water meters can encourage water saving by increasing customers' awareness of their water use. They can reduce wastage by helping identify leaks, and they make bills fairer, as all customers pay for what they use.

What is the current situation? 80% of properties in the South West Water region have a basic water meter, but very few have a smart water meter so it is not possible to see water use in real-time.

What is the plan for this?

Benefit by 2030	Installing smart water meters will help save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also enable new fairer ways to charge customers.
How will they do it?	<ul style="list-style-type: none"> • A programme of installing smart meters: 350,000 smart meters installed by 2030 (and all customers to have one by 2040). • Support customers to use less water with water efficiency advice and support.
Cost on bill	This will add £3 to the average annual bill (excluding inflation) by 2030.


 **Installing smart water meters** 

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What is the plan for this?

Benefit by 2030	Installing smart water meters will help save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also enable new fairer ways to charge customers.
How will they do it?	<ul style="list-style-type: none"> • A programme of installing smart meters: 350,000 smart meters installed by 2030 (and all customers to have one by 2040). • Support customers to use less water with water efficiency advice and support.
Cost on bill	Based on an example annual bill of £1000 today, this will add £5 to the annual bill by 2030 (excluding inflation).



Developing new and more flexible water supplies




What is this? Investing in new supplies of water such as reservoirs and increasing the capacity to treat this water. Investing in large pipes to move water around the region more flexibly.


What is the current situation? Climate change and growing population mean that in future there will be greater pressure on sources of water, and more water will need to be taken (or 'abstracted') from environmentally sensitive sites .

What is the plan for this?

Benefit by 2030	Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.
How will they do it?	<ul style="list-style-type: none"> Develop a new reservoir from a disused quarry. Develop new groundwater sources. Increase water treatment capacity. Build a new water re-use plant to recycle wastewater into clean water. Start to build a major new regional reservoir in the Mendip Hills.
Cost on bill	This will add £17 to the average annual bill (excluding inflation) by 2030.



Developing new and more flexible water supplies




What is this? Investing in new supplies of water such as reservoirs and increasing the capacity to treat this water. Investing in large pipes to move water around the region more flexibly.


What is the current situation? Climate change and growing population mean that in future there will be greater pressure on sources of water, and more water will need to be taken ('abstracted') from environmentally sensitive sites .

What is the plan for this?

Benefit by 2030	Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.
How will they do it?	<ul style="list-style-type: none"> Develop a new reservoir from a disused quarry. Develop new groundwater sources. Increase water treatment capacity. Build a new water re-use plant to recycle wastewater into clean water. Start to build a major new regional reservoir in the Mendip Hills.
Cost on bill	Based on an example annual bill of £1000 today, this will add £24 to the annual bill by 2030 (excluding inflation).



Net zero operational emissions and creating new habitats




What does this mean? Operational net zero means that a company, on balance, does not add any carbon into the atmosphere through operations that it directly controls. Ways of achieving operational net zero can include planting trees and restoring peatland, which help create new habitats for wildlife.


What is the current situation? South West Water uses electricity and gas to run their sites, fuel to run vehicles and chemicals to treat water.

What is the plan for this?

Benefit by 2030	Make the company's operations carbon neutral and create 85,000 hectares of natural habitats
How will they do it?	<ul style="list-style-type: none"> • Moving entirely to electric vehicles • Develop renewable energy at sites owned by South West Water • Plant 300,000 trees to remove greenhouse gases from the atmosphere • Peatland and seagrass restoration • 1,000 'smart' ponds to create new habitats and help reduce flooding
Cost on bill	This will add £6 to the average annual bill (excluding inflation) by 2030.



Net zero operational emissions and creating new habitats




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How will they do it?	<ul style="list-style-type: none"> • Moving entirely to electric vehicles • Develop renewable energy at sites owned by South West Water • Plant 300,000 trees to remove greenhouse gases from the atmosphere • Peatland and seagrass restoration • 1,000 'smart' ponds to create new habitats and help reduce flooding
Cost on bill	Based on an example annual bill of £1000 today, this will add £9 to the annual bill by 2030 (excluding inflation).



Reduce storm overflow spills




Legally required

What is this? Storm overflows can spill sewage mixed with rainwater into rivers and the sea after heavy periods of rainfall.


What is the current situation? South West Water have a 'Water Fit' programme which is investing £330m to reduce storm overflows by 2025.

What is the plan for this?

Benefit by 2030	Reducing the use of storm overflows in 275 locations, prioritising shellfish waters, bathing waters and environmentally sensitive sites. These sites will spill fewer than 10 times per annum.
How will they do it?	Use a mix of solutions, e.g. building larger sewers, and storage tanks to slow down flows in the network, stopping rainwater from getting into our sewers where possible and slowing down rainfall through wetlands and ponds.
Cost on bill	This will add £55 to the average annual bill (excluding inflation) by 2030.



Reduce storm overflow spills




Legally required

What is this? Storm overflows can spill sewage mixed with rainwater into rivers and the sea after heavy periods of rainfall.


What is the current situation? South West Water have a 'Water Fit' programme which is investing £330m to reduce storm overflows by 2025.

What is the plan for this?

Benefit by 2030	Reducing the use of storm overflows in 275 locations, prioritising shellfish waters, bathing waters and environmentally sensitive sites. These sites will spill fewer than 10 times per annum
How will they do it?	Use a mix of solutions, e.g. building larger sewers, and storage tanks to slow down flows in the network, stopping rainwater from getting into our sewers where possible and slowing down rainfall through wetlands and ponds.
Cost on bill	Based on an example annual bill of £1000 today, this will add £79 to the annual bill by 2030 (excluding inflation).



Improving river and coastal water quality by preventing discharge of excess nutrients




Legally required

What does this mean? The quality of water in rivers and estuaries is negatively affected by excess nutrients like nitrogen and phosphorous. These get into rivers from water companies' wastewater treatment works, as well as industry and agriculture.


What is the current situation? South West Water meet current legal standards for levels of nutrients they discharge into rivers from their treatment works. But tougher standards are being introduced to improve water quality in rivers and estuaries. In some environmentally sensitive areas, the new legal requirements mean housing developments have been stopped – as they would cause excessive discharge of nutrients into nearby rivers.

What is the plan for this?

Benefit by 2030	Halving negative impact of wastewater treatment works on rivers (as measured by The Environment Agency) and improving river & coastal water quality.
How will they do it?	<ul style="list-style-type: none"> Upgrade 37 wastewater treatment works to meet tighter environmental standards, including 7 works to enable new housing development.
Cost on bill	This will add £18 to the average annual bill (excluding inflation) by 2030.



Improving river and coastal water quality by preventing discharge of excess nutrients



Legally required













What does this mean? The quality of water in rivers and estuaries is negatively affected by excess nutrients like nitrogen and phosphorous. These get into rivers from water companies' wastewater treatment works, as well as industry and agriculture.

What is the current situation? South West Water meet current legal standards for levels of nutrients they discharge into rivers from their treatment works. But tougher standards are being introduced to improve water quality in rivers and estuaries. In some environmentally sensitive areas, the new legal requirements mean housing developments have been stopped – as they would cause excessive discharge of nutrients into nearby rivers.













What is the plan for this?

Benefit by 2030	Halving negative impact of wastewater treatment works on rivers (as measured by The Environment Agency) and improving river & coastal water quality.
How will they do it?	<ul style="list-style-type: none"> Upgrade 37 wastewater treatment works to meet tighter environmental standards, including 7 works to enable new housing development.
Cost on bill	Based on an example annual bill of £1000 today, this will add £25 to the annual bill by 2030 (excluding inflation).







STIM 13_SWW_HH

These are key elements of the business plan only and do not make up the full set of activities or costs.		
By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030.	£0
	Reduce leakage from 103 litres per property per day in 2025 to 78 in 2030.	£7
	Reduce contacts about tap water quality to from 1.3 to 1.1 per 1,000 population.	£6
	Continue meeting target for internal sewage flooding of properties.	£4
	Reduce outdoor sewer flooding to 14 incidents per 10,000 connections.	£6
	Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6.	£10
	Increase water supply by the equivalent used by 150,000 people.	£17
	Install 350,000 smart water meters.	£3
	Improve water quality and reduce risk of lead exposure for over 5,000 homes.	£11
	Make the company's operations carbon neutral & create new habitats.	£6
	Reduce the use of storm overflows in 275 locations. <i>(legally required)</i>	£55
	Improve river/coastal water quality by preventing discharge of excess nutrients <i>(legally required)</i>	£18
£/yr means the added amount on to the average current annual bill (excluding inflation) by 2030		

STIM 13_SWW_NHH







These are key elements of the business plan only and do not make up the full set of activities or costs.		
By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030.	£0
	Reduce leakage from 103 litres per property per day in 2025 to 78 in 2030.	£9
	Reduce contacts about tap water quality to from 1.3 to 1.1 per 1,000 population.	£8
	Continue meeting target for internal sewage flooding of properties.	£6
	Reduce outdoor sewer flooding to 14 incidents per 10,000 connections.	£9
	Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6.	£14
	Increase water supply by the equivalent used by 150,000 people.	£24
	Install 350,000 smart water meters.	£5
	Improve water quality and reduce risk of lead exposure for over 5,000 homes.	£16
	Make the company's operations carbon neutral & create new habitats.	£9
	Reduce the use of storm overflows in 275 locations. <i>(legally required)</i>	£79
	Improve river/coastal water quality by preventing discharge of excess nutrients <i>(legally required)</i>	£25
£/yr means the added amount on an example annual bill of £1000 today (excluding inflation) by 2030		

STIM 14_SWW_HH

By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage from 103 litres per property per day in 2025 to 78 in 2030	£7
	Reduce contacts about tap water quality from 1.3 to 1.1 per 1,000 population	£6
	Increase water supply by the equivalent used by 150,000 people	£17
	Install 350,000 smart water meters	£3
	Improve water quality and reduce risk of lead exposure for over 5,000 homes	£11

£/yr means the **added amount** on to the **average** current annual bill (excluding inflation) by 2030

STIM 14_SWW_NHH

By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage from 103 litres per property per day in 2025 to 78 in 2030	£9
	Reduce contacts about tap water quality to from 1.3 to 1.1 per 1,000 population	£8
	Increase water supply by the equivalent used by 150,000 people	£24
	Install 350,000 smart water meters	£5
	Improve water quality and reduce risk of lead exposure for over 5,000 homes	£16







£/yr means the **added amount** based on an **example annual bill of £500** today (excluding inflation) by 2030

STIM 15_SWW_HH



South West Water's plan for sewerage services 2025-30

These are **key elements** of South West Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
 Continue meeting target for internal sewage flooding of properties	£4
 Reduce outdoor sewer flooding to 14 incidents per 10,000 connections	£6
 Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6	£10
 Make the company's operations carbon neutral & create new habitats	£6
 Reduce the use of storm overflows in 275 locations (<i>legally required</i>)	£55
 Improve river/coastal water quality by preventing discharge of excess nutrients (<i>legally required</i>)	£18







£/yr means the **added amount** on to the **average** current annual bill (excluding inflation) by 2030

STIM 15_SWW_NHH



South West Water's plan for sewerage services 2025-30

These are **key elements** of South West Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
 Continue meeting target for internal sewage flooding of properties	£6
 Reduce outdoor sewer floods to 14 incidents per 10,000 properties	£9
 Reduce pollution incidents from 19.5 per 10,000km of sewer in 2025, to 13.6	£14
 Make the company's operations carbon neutral & create new habitats.	£9
 Reduce the use of storm overflows in 275 locations (<i>legally required</i>)	£79
 Improve river/coastal water quality by preventing discharge of excess nutrients (<i>legally required</i>)	£25


£/yr means the **added amount** based on an **example annual bill of £500** today (excluding inflation) by 2030

Bristol^zWater




**BRISTOL
WATER**

the what we're made of.



Water supply interruptions, lasting longer than 3 hours




What does this mean? It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected.


How are Bristol Water performing on this?
Water companies are measured on the length of time properties are without water. The measure used is the duration without water for more than 3 hours by minutes per property. Bristol Water's performance on this measure is currently 2 mins 31 secs.
Bristol Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	The duration without water for more than 3 hours by minutes per property stays at, or better than, the current target level (of 5 minutes).
How will they do it?	Maintaining 2024/25 performance by <ul style="list-style-type: none"> Repairing water pipes Replacing the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.



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What is the plan for this?

Benefit by 2030	The duration without water for more than 3 hours by minutes per property stays at, or better than, the current target level (of 5 minutes).
How will they do it?	Maintaining 2024/25 performance by <ul style="list-style-type: none"> Repairing water pipes Replacing the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.


How do water companies perform on the length of time properties are without water?




The measure used is the duration without water for more than 3 hours by minutes per property.
Companies with the lowest numbers perform best for this service.

*Bristol Water perform **2nd out of 17** companies overall on this measure:*

	min:sec	
Portsmouth Water	02:21	
Bristol Water	02:31	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;">Better performance</div> <div style="margin-bottom: 10px;">↑</div> <div style="margin-bottom: 10px;">↓</div> <div style="margin-bottom: 10px;">Worse performance</div> </div>
SES Water	02:58	
SSC	03:15	
Affinity Water	03:43	
Wessex Water	04:12	
United Utilities Water	07:58	
Southern Water	09:22	
Anglian Water	09:48	
Yorkshire Water	10:38	
Thames Water	11:03	
Northumbrian Water	11:45	
Severn Trent Water	12:39	
South West Water	13:40	
Dwr Cymru	16:12	
Hafren Dyfrdwy	37:28	
South East Water	72:33	



Reducing leaks




What does this mean? Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.


How are Bristol Water performing on this?
Water companies are measured on the amount of water lost due to leaks from water mains and pipes. The measure used is annual leakage per property served (litres per day). Bristol Water's annual leakage currently stands at 65 litres per property per day. **Bristol Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce the amount lost from 56.5 litres per property per day in 2025 to 50.7 in 2030 and so reduce the amount of water Bristol Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> Repairing leaks when they find them Replacing old water mains Helping customers to replace their leaky pipes.
Cost on bill	This will add £5 to the average annual bill (excluding inflation) by 2030.



Reducing leaks




What does this mean? Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

How are Bristol Water performing on this?
Water companies are measured on the amount of water lost due to leaks from water mains and pipes. The measure used is annual leakage per property served (litres per day). Bristol Water's annual leakage currently stands at 65 litres per property per day. **Bristol Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce the amount lost from 56.5 litres per property per day in 2025 to 50.7 in 2030 and so reduce the amount of water Bristol Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> Repairing leaks when they find them Replacing old water mains Helping customers to replace their leaky pipes.
Cost on bill	Based on an example annual bill of £1000 today, this will add £11 to the annual bill by 2030 (excluding inflation).


How do water companies perform on the amount of water lost due to leaks from water mains and pipes?




The measure used is annual leakage per property served (litres per day).
Companies with the lowest numbers perform best for this service.

Bristol Water perform 1st out of 19 companies overall on this measure:

	Litres / day	
Bristol Water	65.0	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;">Better performance</div> <div style="margin-bottom: 10px;">↑</div> <div style="margin-bottom: 10px;">↓</div> <div style="margin-bottom: 10px;">Worse performance</div> </div>
Essex and Suffolk	76.4	
Portsmouth Water	77.0	
SES Water	78.7	
Anglian Water	80.2	
Southern Water	83.2	
South East Water	87.6	
Cambridge Water	90.7	
Wessex Water	103.3	
South West Water	107.7	
Northumbrian Water	108.3	
Affinity Water	108.7	
Dwr Cymru	112.3	
South Staffs Water	113.5	
Severn Trent Water	119.7	
Yorkshire Water	122.9	
United Utilities Water	124.2	
Hafren Dyfrdwy	131.0	
Thames Water	151.5	



The appearance, taste and smell of tap water




What does this mean? Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.


How are Bristol Water performing on this? Water companies are measured on the number of customer contacts received regarding the appearance, taste and smell of tap water per 1,000 population. Bristol Water currently receives 1.38 contacts regarding incidents per 1,000 population in the area. **Bristol Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce the current number of contacts about appearance, taste and smell of tap water from 1.38 to 1.10 per 1,000 population in 2030.
How will they do it?	<ul style="list-style-type: none"> Replace cast iron mains which can cause a brown tinge to tap water.
Cost on bill	This will add £3 to the average annual bill (excluding inflation) by 2030.



The appearance, taste and smell of tap water




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How are Bristol Water performing on this? Water companies are measured on the number of customer contacts received regarding the appearance, taste and smell of tap water per 1,000 population. Bristol Water currently receives 1.38 contacts regarding incidents per 1,000 population in the area. **Bristol Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce the current number of contacts about appearance, taste and smell of tap water from 1.38 to 1.10 per 1,000 population in 2030.
How will they do it?	<ul style="list-style-type: none"> Replace cast iron mains which can cause a brown tinge to tap water.
Cost on bill	Based on an example annual bill of £1000 today, this will add £7 to the annual bill by 2030 (excluding inflation).


How do water companies perform on number of customer contacts received regarding appearance, taste and smell of tap water?




The measure used is the number of customer contacts regarding incidents, per 1,000 population. **Companies with the lowest numbers perform best for this service.**

Bristol Water perform 13th out of 17 companies overall on this measure:


	Contacts per 1,000 population
Portsmouth Water	0.41
Thames Water	0.49
SES Water	0.58
Affinity Water	0.73
SSC	0.76
Severn Trent Water	0.93
Northumbrian Water	0.97
Anglian Water	1.03
Yorkshire Water	1.09
Southern Water	1.1
Wessex Water	1.17
South East Water	1.34
Bristol Water	1.38
South West Water	1.55
Hafren Dyfrdwy	1.71
United Utilities Water	1.79
Dwr Cymru	2.38




Better performance



Worse performance



Net zero operational emissions and creating new habitats




What does this mean? Operational net zero means that a company, on balance, does not add any carbon into the atmosphere through operations that it directly controls. Ways of achieving operational net zero can include planting trees and restoring peatland, which help create new habitats for wildlife.


What is the current situation? Bristol Water uses electricity and gas to run their sites and pump water to homes, fuel to run vehicles and chemicals to treat water.

What is the plan for this?

Benefit by 2030	Make the company's operations carbon neutral and create 40,000 hectares of natural habitats
How will they do it?	<ul style="list-style-type: none"> Moving entirely to electric vehicles Develop renewable energy at sites owned by Bristol Water Plant 200,000 trees to remove greenhouse gases from the atmosphere Peatland and seagrass restoration 1,000 'smart' ponds to create new habitats and help reduce flooding.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.



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Cost on bill	Based on an example annual bill of £1000 today, this will add £4 to the annual bill by 2030 (excluding inflation).



Installing smart water meters




What does this mean? Smart water meters can encourage water saving by increasing customers' awareness of their water use. They can reduce wastage by helping identify leaks, and they make bills fairer, as all customers pay for what they use.


What is the current situation? Just over 64% of households in the Bristol Water region have a basic water meter, very few households have a smart water meter, so it is not possible to see water use in real-time.

What is the plan for this?

Benefit by 2030	Installing smart water meters will help save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also enable new fairer ways to charge customers.
How will they do it?	Bristol Water will install smart meters in 175,000 properties by 2030 Support customers to use less water with water efficiency advice and support.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.



Installing smart water meters




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What is the current situation? Just over 64% of households in the Bristol Water region have a basic water meter, very few households have a smart water meter, so it is not possible to see water use in real-time.

What is the plan for this?

Benefit by 2030	Installing smart water meters will help save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also enable new fairer ways to charge customers.
How will they do it?	Bristol Water will install smart meters in 175,000 properties by 2030 Support customers to use less water with water efficiency advice and support.
Cost on bill	Based on an example annual bill of £1000 today, this will add £4 to the annual bill by 2030 (excluding inflation).



Improving tap water quality through upgrading treatment works and replacing lead pipes




What does this mean? Lead pipes still connect some customers' properties to the water mains, meaning there is a risk that traces of lead can get into tap water. There is also a very small risk of microbiological contamination of tap water.

What is the current situation?


- Lead pipes on customers' properties (owned by customers) affect 140,000 properties in the region. Currently harmless chemical additives are added into the water supply to prevent any negative impact of lead pipes on health.
- Low risk of microbiological contamination of tap water which would result in a 'boil your water' notice.

What is the plan for this?

Benefit by 2030	Reduce risk of lead exposure for at least 10,000 properties between 2025-30, and reduce risk of microbiological contamination of tap water for all.
How will they do it?	<ul style="list-style-type: none"> • Offer a mix of free and subsidised replacement for lead pipes owned by customers; those on the lowest incomes receive free replacement • Upgrade water treatment works.
Cost on bill	This will add £10 to the average annual bill (excluding inflation) by 2030.



Improving tap water quality through upgrading treatment works and replacing lead pipes



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What is the current situation?

- Lead pipes on customers' properties (owned by customers) affect 140,000 properties in the region. Currently harmless chemical additives are added into the water supply to prevent any negative impact of lead pipes on health.
- Low risk of microbiological contamination of tap water which would result in a 'boil your water' notice.

What is the plan for this?

Benefit by 2030	Reduce risk of lead exposure for at least 10,000 properties between 2025-30, and reduce risk of microbiological contamination of tap water for all.
How will they do it?	<ul style="list-style-type: none"> • Offer a mix of free and subsidised replacement for lead pipes owned by customers; those on the lowest incomes receive free replacement • Upgrade water treatment works.
Cost on bill	Based on an example annual bill of £1000 today, this will add £22 to the annual bill by 2030 (excluding inflation).

FOR YOU. FOR LIFE.
 Wessex Water
YTL GROUP

Sewage flooding of properties – internal

What does this mean? An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

How are Wessex Water performing on this?
 Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 1.42 incidents of internal sewer flooding per 10,000 properties.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce internal sewer flooding incidents from 1.42 to 1.17 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

FOR YOU. FOR LIFE.
 Wessex Water
YTL GROUP

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 Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 1.42 incidents of internal sewer flooding per 10,000 properties.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce internal sewer flooding incidents from 1.42 to 1.17 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	Based on an example annual bill of £1000 today, this will add £5 to the annual bill by 2030 (excluding inflation).

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 Wessex Water
YTL GROUP

How do water companies perform on the incidents of sewage flooding inside properties?

The measure used is the number of properties affected by sewage flooding, per 10,000.
Companies with the lowest numbers perform best for this service.


*Wessex Water perform **3rd out of 11** companies overall on this measure:*

	No. properties affected per 1,000	
South West Water	0.76	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="color: green; font-weight: bold; margin-bottom: 10px;">↑ Better performance</div> <div style="color: red; font-weight: bold; margin-top: 10px;">↓ Worse performance</div> </div>
Dwr Cymru	1.36	
Wessex Water	1.42	
Severn Trent Water	1.61	
Anglian Water	1.73	
Northumbrian Water	1.84	
Hafren Dyfrdwy	2.34	
Yorkshire Water	2.83	
United Utilities	2.97	
Southern Water	3.04	
Thames Water	3.46	

Only the companies that provide sewerage services are included in this comparison

FOR YOU. FOR LIFE.
 Wessex Water
YTL GROUP

Sewage flooding of properties – external



What does this mean? An escape of sewage into gardens or access points to peoples’ properties is inconvenient and unpleasant and can restrict access.


How are Wessex Water performing on this? Water companies are measured on the incidents of sewage flooding gardens or outbuildings. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 19.2 incidents of external sewer flooding per 10,000 properties. **Wessex Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce external sewer flooding from 19.2 to 14.5 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

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 Wessex Water
YTL GROUP

Sewage flooding of properties – external



What does this mean? An escape of sewage into gardens or access points to peoples’ properties is inconvenient and unpleasant and can restrict access.


How are Wessex Water performing on this? Water companies are measured on the incidents of sewage flooding gardens or outbuildings. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 19.2 incidents of external sewer flooding per 10,000 properties. **Wessex Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce external sewer flooding from 19.2 to 14.5 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> Raise awareness of what can cause blockages Identify pipes that need to be cleaned or repaired Reduce amount of rainwater entering sewers Invest in new/larger sewers.
Cost on bill	Based on an example annual bill of £1000 today, this will add £5 to the annual bill by 2030 (excluding inflation).

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 Wessex Water
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How do water companies perform on the incidents of sewage flooding gardens or outbuildings?



The measure used is the number of properties affected by sewage flooding gardens or outbuildings, per 10,000. **Companies with the lowest numbers perform best for this service.**

Wessex Water perform **7th out of 11** companies overall on this measure:


	No. properties affected per 1,000	
Thames Water	9.4	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="color: green; font-weight: bold; margin-bottom: 10px;">↑ Better performance</div> <div style="color: red; font-weight: bold; margin-top: 10px;">↓ Worse performance</div> </div>
Severn Trent Water	10.8	
Anglian Water	14.6	
United Utilities	18.1	
South West Water	18.1	
Hafren Dyfrdwy	19.1	
Wessex Water	19.2	
Yorkshire Water	19.5	
Southern Water	19.5	
Dwr Cymru	26.3	
Northumbrian Water	26.6	

Only the companies that provide sewerage services are included in this comparison

STIM 10_WW_HH

FOR YOU. FOR LIFE.
Wessex Water
YTL GROUP

Removing everyone from water poverty



What does this mean? Water poverty is when a household spends more than 5% of its disposable income on the water bill.

What is the current situation? Wessex Water have already given financial support to 55,000 households in water poverty. This is known as a 'social tariff' as the support is paid for through other customers' bills. There are likely to be many more households in the region who need help in the future.


What is the plan for this?

Benefit by 2030	Remove everyone from water poverty by 2030, so all customers will be able to afford their bill.
How will they do it?	<ul style="list-style-type: none"> Giving financial support to more customers in water poverty - increasing assistance to help around 100,000 households in total Continuing to work with partners such as Citizens Advice Making it easier to get support, through automatic bill reductions Funding community projects.
Cost on bill	This will add £12 to the average annual bill (excluding inflation) by 2030 for all those customers not on a social tariff.

STIM 10_WW_NHH

FOR YOU. FOR LIFE.
Wessex Water
YTL GROUP

Removing everyone from water poverty



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What is the current situation? Wessex Water have already given financial support to 55,000 households in water poverty. This is known as a 'social tariff' as the support is paid for through other customers' bills. There are likely to be many more households in the region who need help in the future.

What is the plan for this?

Benefit by 2030	Remove everyone from water poverty by 2030, so all customers will be able to afford their bill.
How will they do it?	<ul style="list-style-type: none"> Giving financial support to more customers in water poverty - increasing assistance to help around 100,000 households in total Continuing to work with partners such as Citizens Advice Making it easier to get support, through automatic bill reductions Funding community projects.
Cost on bill	This will not add anything to your annual bill above what you pay today.

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Preventing excess nitrogen and phosphorous from entering rivers and sea

Legally required

What does this mean? Large parts of the natural environment in the region have been negatively affected by too much nitrogen and phosphorus entering rivers and seas from industry, wastewater and agriculture.



What is the current situation? There is new legislation to ensure the health of rivers and coastal water environments is restored by reducing the levels of nitrogen and phosphorous.

What is the plan for this?

Benefit by 2030	Restore the quality of rivers and coastal waters by preventing 1,500 tonnes of nitrogen and phosphorous from entering rivers and the sea.
How will they do it?	<ul style="list-style-type: none"> Installing nitrogen and phosphorus removal technology at Wessex Water's treatment works Where they can, work in partnership with farmers and landowners to prevent nitrogen and phosphorous getting washed from the land into rivers and the sea Creating wetland areas to naturally absorb nitrogen and phosphorous.
Cost on bill	This will add £57 to the average annual bill (excluding inflation) by 2030.

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Wessex Water
YTL GROUP

Preventing excess nitrogen and phosphorous from entering rivers and sea

Legally required

What does this mean? Large parts of the natural environment in the region have been negatively affected by too much nitrogen and phosphorus entering rivers and seas from industry, wastewater and agriculture.


What is the current situation? There is new legislation to ensure the health of rivers and coastal water environments is restored by reducing the levels of nitrogen and phosphorous.


What is the plan for this?

Benefit by 2030	Restore the quality of rivers and coastal waters by preventing 1,500 tonnes of nitrogen and phosphorous from entering rivers and the sea.
How will they do it?	<ul style="list-style-type: none"> Installing nitrogen and phosphorus removal technology at Wessex Water's treatment works Where they can, work in partnership with farmers and landowners to prevent nitrogen and phosphorous getting washed from the land into rivers and the sea Creating wetland areas to naturally absorb nitrogen and phosphorous.
Cost on bill	Based on an example annual bill of £1000 today, this will add £137 to the annual bill by 2030 (excluding inflation).

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Reducing sewage spills





Legally required

What does this mean? When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea.


What is the current situation? Wessex Water have 1,300 storm overflows, which, when they spill, help reduce the risk of properties being flooded with sewage. Longer-term targets have been set by government to reduce the use of storm overflows.


What is the plan for this?

Benefit by 2030	Wessex Water will reduce spills at 148 sites, focusing on sensitive sites to reduce the environmental impact.
How will they do it?	<ul style="list-style-type: none"> Increasing storm water storage at sites Working with local communities to reduce the rain water entering the sewers Building natural solutions like wetlands to provide a form of treatment before it enters the river.
Cost on bill	This will add £23 to the average annual bill (excluding inflation) by 2030.

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Reducing sewage spills





Legally required

What does this mean? When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea.













What is the current situation? Wessex Water have 1,300 storm overflows, which, when they spill, help reduce the risk of properties being flooded with sewage. Longer-term targets have been set by government to reduce the use of storm overflows.

What is the plan for this?

Benefit by 2030	Wessex Water will reduce spills at 148 sites, focusing on sensitive sites to reduce the environmental impact.
How will they do it?	<ul style="list-style-type: none"> Increasing storm water storage at sites Working with local communities to reduce the rain water entering the sewers Building natural solutions like wetlands to provide a form of treatment before it enters the river.
Cost on bill	Based on an example annual bill of £1000 today, this will add £55 to the annual bill by 2030 (excluding inflation).

STIM 13_BR_WW_HH













These are **key elements** of the business plans only and do not make up the full set of activities or costs.

By 2030...	£/yr
 Maintain target level for supply interruptions from 2025 to 2030	£0
 Reduce leakage per property per day from 56.5 litres in 2025 to 50.7 in 2030	£5
 Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£3
 Become operationally carbon neutral and create 40,000 hectares of habitat	£2
 Install 175,000 smart water meters	£2
 Upgrading treatment works and replace 10,000 lead pipes	£10
 Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£2
 Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£2
 Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£5
 Remove everyone from water poverty	£12
 Prevent excess nitrogen and phosphorous entering rivers and sea (<i>legally required</i>)	£57
 Reduce sewage spills at 148 sites, focusing on sensitive sites (<i>legally required</i>)	£23

£/yr means the **added amount** (excluding inflation) on to the **average** current annual bill by 2030.

STIM 13_BRL_WW_NHH

These are **key elements** of the business plans only and do not make up the full set of activities or costs.

By 2030...	£/yr
 Maintain target level for supply interruptions from 2025 to 2030	£0
 Reduce leakage per property per day from 56.5 litres in 2025 to 50.7 in 2030	£11
 Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£7
 Become operationally carbon neutral and create 40,000 hectares of habitat	£4
 Install 175,000 smart water meters	£4
 Upgrading treatment works and replace 10,000 lead pipes	£22
 Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£5
 Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£5
 Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£12
 Remove everyone from water poverty	£0
 Prevent excess nitrogen and phosphorous entering rivers and sea (<i>legally required</i>)	£137
 Reduce sewage spills at 148 sites, focusing on sensitive sites (<i>legally required</i>)	£55

£/yr means the **added amount** on an **example annual bill of £1000** today (excluding inflation) by 2030



Bristol Water's plan for water supply services 2025-30

These are **key elements** of Bristol Water's business plan only, and do not make up the full set of activities or costs.

By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage per property per day from 56.5 litres in 2025 to 50.7 in 2030	£5
	Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£3
	Become operationally carbon neutral and create 40,000 hectares of habitat	£2
	Install 175,000 smart water meters	£2
	Upgrading treatment works and replace 10,000 lead pipes	£10

£/yr means the **added amount** on to the **average** current annual bill (excluding inflation) by 2030



Bristol Water's plan for water supply services 2025-30

These are **key elements** of Bristol Water's business plan only, and do not make up the full set of activities or costs.







By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage per property per day from 56.5 litres in 2025 to 50.7 in 2030	£11
	Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£7
	Become operationally carbon neutral and create 40,000 hectares of habitat	£4
	Install 175,000 smart water meters	£4
	Upgrading treatment works and replace 10,000 lead pipes	£22

£/yr means the **added amount** on an **example** annual bill of **£500** today (excluding inflation) by 2030



Wessex Water's plan for sewerage services 2025-30

These are **key elements** of Wessex Water's business plan only, and do not make up the full set of activities or costs.







By 2030...	£/yr
 Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£2
 Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£2
 Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£5
 Remove everyone from water poverty	£12
 Prevent excess nitrogen and phosphorous entering rivers and sea <i>(legally required)</i>	£57
 Reduce sewage spills at 148 sites, focusing on sensitive sites <i>(legally required)</i>	£23

£/yr means the **added amount** on to the **average** current annual bill (excluding inflation) by 2030



Wessex Water's plan for sewerage services 2025-30


These are **key elements** of Wessex Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
 Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£5
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 Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£12
 Remove everyone from water poverty	£0
 Prevent excess nitrogen and phosphorous entering rivers and sea <i>(legally required)</i>	£137
 Reduce sewage spills at 148 sites, focusing on sensitive sites <i>(legally required)</i>	£55

£/yr means the **added amount** based on an **example** annual bill of **£500** today (excluding inflation) by 2030



Bournemouth Water

 **Water supply interruptions, lasting longer than 3 hours**



What does this mean? It would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water. Sometimes business operations may be affected.

How are Bournemouth Water (as part of South West Water) performing on this? Water companies are measured on the length of time properties are without water. The measure used is the duration without water for more than 3 hours by minutes per property. Bournemouth Water's performance on this measure is currently 13 mins 40 seconds. **Bournemouth Water did not meet their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Achieve the target level for supply interruptions by 2025 (at 5 minutes per property) and then maintain this level up to 2030.
How will they do it?	<ul style="list-style-type: none"> • Repair water pipes • Replace the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.

 **Water supply interruptions, lasting longer than 3 hours**



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What is the plan for this?



Benefit by 2030	Achieve the target level for supply interruptions by 2025 (at 5 minutes per property) and then maintain this level up to 2030.
How will they do it?	<ul style="list-style-type: none"> • Repair water pipes • Replace the pipes which cause the most problems.
Cost on bill	This will not add anything to your annual bill above what you pay today.

How do water companies perform on the length of time properties are without water?

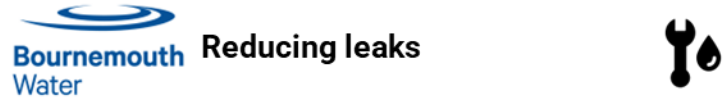


The measure used is the duration without water for more than 3 hours by minutes per property. **Companies with the *lowest* numbers perform best for this service.**

Bournemouth Water perform 14th out of 17 companies overall on this measure:

	min:sec	
Portsmouth Water	02:21	<p>Better performance</p>   <p>Worse performance</p>
Bristol Water	02:31	
SES Water	02:58	
SSC	03:15	
Affinity Water	03:43	
Wessex Water	04:12	
United Utilities Water	07:58	
Southern Water	09:22	
Anglian Water	09:48	
Yorkshire Water	10:38	
Thames Water	11:03	
Northumbrian Water	11:45	
Severn Trent Water	12:39	
Bournemouth Water	13:40	
Dwr Cymru	16:12	
Hafren Dyfrdwy	37:28	
South East Water	72:33	

STIM 2A_BW_HH



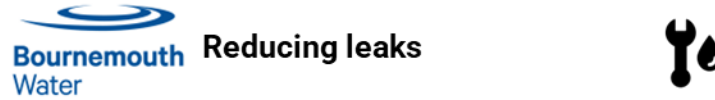
What does this mean? Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

How are Bournemouth Water (as part of South West Water) performing on this? Water companies are measured on the amount of water lost due to leaks from water mains and pipes. The measure used is annual leakage per property served (litres per day). Bournemouth Water's annual leakage currently stands at 108 litres per property per day. **Bournemouth Water met their target last year.**

What is the plan for this?

Benefit by 2030	Reduce leakage from 83.6 litres per property per day in 2025 to 78 in 2030 and so reduce the amount of water Bournemouth Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> • Repair leaks when they find them • Replace old water mains • Help customers to replace their leaky pipes too.
Cost on bill	This will add £5 to the average annual bill (excluding inflation) by 2030.

STIM 2A_BW_NHH



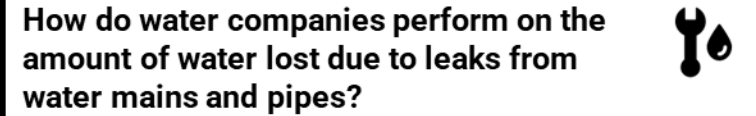
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How will they do it?	<ul style="list-style-type: none"> • Repair leaks when they find them. • Replace old water mains. • Help customers to replace their leaky pipes too.
Cost on bill	Based on an example annual bill of £1000 today, this will add £14 to the annual bill by 2030 (excluding inflation).


STIM 2B_BW_HH_NHH




The measure used is annual leakage per property served (litres per day). **Companies with the lowest numbers perform best for this service.**

Bournemouth Water perform 10th out of 19 companies overall on this measure:

	Litres / day	
Bristol Water	65.0	Better performance ↑ ↓ Worse performance
Essex and Suffolk	76.4	
Portsmouth Water	77.0	
SES Water	78.7	
Anglian Water	80.2	
Southern Water	83.2	
South East Water	87.6	
Cambridge Water	90.7	
Wessex Water	103.3	
Bournemouth Water	107.7	
Northumbrian Water	108.3	
Affinity Water	108.7	
Dwr Cymru	112.3	
South Staffs Water	113.5	
Severn Trent Water	119.7	
Yorkshire Water	122.9	
United Utilities Water	124.2	
Hafren Dyfrdwy	131.0	
Thames Water	151.5	




The appearance, taste and smell of tap water 


What does this mean? Tap water may look discoloured or taste/smell different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

How are Bournemouth Water (as part of South West Water) performing on this? Water companies are measured on the number of customer contacts received regarding the appearance, taste and smell of tap water per 1,000 population. Bournemouth Water currently receives 1.55 contacts regarding incidents per 1,000 population in the area. **Bournemouth Water met their target for this metric last year.**

What is the plan for this?

Benefit by 2030	Reduce the number of contacts about appearance, taste and smell of tap water from 1.33 per 1,000 population in 2025 to 1.10 per 1,000 population in 2030.
How will they do it?	<ul style="list-style-type: none"> Replace cast iron mains which can cause a brown tinge to tap water.
Cost on bill	This will add £4 to the average annual bill (excluding inflation) by 2030.




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What is the plan for this?


Benefit by 2030	Reduce the number of contacts about appearance, taste and smell of tap water from 1.33 per 1,000 population in 2025 to 1.10 per 1,000 population in 2030.
How will they do it?	<ul style="list-style-type: none"> Replace cast iron mains which can cause a brown tinge to tap water.
Cost on bill	Based on an example annual bill of £1000 today, this will add £12 to the annual bill by 2030 (excluding inflation).

How do water companies perform on number of customer contacts received regarding appearance, taste and smell of tap water? 


The measure used is the number of customer contacts regarding incidents, per 1,000 population. **Companies with the lowest numbers perform best for this service.**

Bournemouth Water perform 14th out of 17 companies overall on this measure:

	Contacts per 1,000 population	
Portsmouth Water	0.41	Better performance   Worse performance
Thames Water	0.49	
SES Water	0.58	
Affinity Water	0.73	
SSC	0.76	
Severn Trent Water	0.93	
Northumbrian Water	0.97	
Anglian Water	1.03	
Yorkshire Water	1.09	
Southern Water	1.1	
Wessex Water	1.17	
South East Water	1.34	
Bristol Water	1.38	
Bournemouth Water	1.55	
Hafren Dyfrdwy	1.71	
United Utilities Water	1.79	
Dwr Cymru	2.38	



Developing new and more flexible water supplies




What is this? Investing in new supplies of water such as reservoirs and increasing the capacity to treat this water. Investing in large pipes to move water around the region more flexibly.


What is the current situation? Climate change and growing population mean that in future there will be greater pressure on sources of water, and more water will need to be taken (or 'abstracted') from environmentally sensitive sites.

What is the plan for this?

Benefit by 2030	Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.
How will they do it?	<ul style="list-style-type: none"> Develop a new reservoir from a disused quarry. Develop new groundwater sources. Increase water treatment capacity. Build a new water re-use plant to recycle wastewater into clean water. Start to build a major new regional reservoir in the Mendip Hills.
Cost on bill	This will add £13 to the average annual bill (excluding inflation) by 2030.



Developing new and more flexible water supplies






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What is the plan for this?

Benefit by 2030	Additional supply equivalent to the water used by 150,000 people, allowing abstraction from environmentally sensitive sites to be reduced.
How will they do it?	<ul style="list-style-type: none"> Develop a new reservoir from a disused quarry. Develop new groundwater sources. Increase water treatment capacity. Build a new water re-use plant to recycle wastewater into clean water. Start to build a major new regional reservoir in the Mendip Hills.
Cost on bill	Based on an example annual bill of £1000 today, this will add £37 to the annual bill by 2030 (excluding inflation).




Bournemouth Water Installing smart water meters  



What is this? Smart water meters can encourage water saving by increasing customers' awareness of their water use, they can reduce wastage by helping identify leaks, and make bills fairer, as all customers pay for what they use.

What is the current situation? 80% of properties in the Bournemouth Water region have a basic water meter, but very few have a smart water meter so it is not possible to see water use in real-time.

What is the plan for this?

Benefit by 2030	Installing smart water meters will help save water and help meet new environmental legislation to limit how much water is taken from natural sources. Smart meters also enable new fairer ways to charge customers.
How will they do it?	Across the Bournemouth Water area: <ul style="list-style-type: none"> • A programme of installing smart meters: 350,000 smart meters installed by 2030 (and all customers to have one by 2040) • Help customers to use less water with water efficiency advice and support
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.




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How will they do it?	Across the Bournemouth Water area: <ul style="list-style-type: none"> • A programme of installing smart meters: 350,000 smart meters installed by 2030 (and all customers to have one by 2040) • Help customers to use less water with water efficiency advice and support
Cost on bill	Based on an example annual bill of £1000 today, this will add £7 to the annual bill by 2030 (excluding inflation).



Improving tap water quality through upgrading treatment works and replacing lead pipes




What does this mean? Lead pipes still connect some customers' properties to the water mains, meaning there is a risk that traces of lead can get into tap water. There is also a very small risk of microbiological contamination of tap water.

What is the current situation?


- Lead pipes on customers' properties (owned by customers) affect 80,000 properties in the region. Currently harmless chemical additives are added into the water supply to prevent any negative impact of lead pipes on health.
- Low risk of microbiological contamination of tap water which would result in a 'boil your water' notice.

What is the plan for this?

Benefit by 2030	Reduce risk of lead exposure for at least 5,000 properties between 2025-30, and reduce risk of boil your water notices for all.
How will they do it?	<ul style="list-style-type: none"> • Offer a mix of free and subsidised replacement for lead pipes owned by customers; those on the lowest incomes receive free replacement • Upgrade water treatment works.
Cost on bill	This will add £8 to the average annual bill (excluding inflation) by 2030.



Improving tap water quality through upgrading treatment works and replacing lead pipes



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What is the current situation?


- Lead pipes on customers' properties (owned by customers) affect 80,000 properties in the region. Currently harmless chemical additives are added into the water supply to prevent any negative impact of lead pipes on health.
- Risk of microbiological contamination of tap water is increasing due to increasing pollution of natural water sources.

What is the plan for this?

Benefit by 2030	Reduce risk of lead exposure for at least 5,000 properties between 2025-30, and reduce risk of boil your water notices for all.
How will they do it?	<ul style="list-style-type: none"> • Offer a mix of free and subsidised replacement for lead pipes owned by customers; those on the lowest incomes receive free replacement • Upgrade water treatment works.
Cost on bill	Based on an example annual bill of £1000 today, this will add £23 to the annual bill by 2030 (excluding inflation).

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Sewage flooding of properties – internal



What does this mean? An escape of sewage inside properties is highly inconvenient, disruptive and a potential health risk. In bad cases, people need to move out of their properties while things are put right.

How are Wessex Water performing on this?
Water companies are measured on the incidents of sewage flooding properties. The measure used is the number of properties affected, per 10,000. Wessex Water currently have 1.42 incidents of internal sewer flooding per 10,000 properties.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce internal sewer flooding incidents from 1.42 to 1.17 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> • Raise awareness of what can cause blockages • Identify pipes that need to be cleaned or repaired • Reduce amount of rainwater entering sewers • Invest in new/larger sewers.
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

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Wessex Water
YTL GROUP

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Wessex Water met their target for this metric last year.

What is the plan for this?



Benefit by 2030	Reduce internal sewer flooding incidents from 1.42 to 1.17 incidents per 10,000 properties.
How will they do it?	<ul style="list-style-type: none"> • Raise awareness of what can cause blockages • Identify pipes that need to be cleaned or repaired • Reduce amount of rainwater entering sewers • Invest in new/larger sewers.
Cost on bill	Based on an example annual bill of £1000 today, this will add £5 to the annual bill by 2030 (excluding inflation).

How do water companies perform on the incidents of sewage flooding inside properties?



The measure used is the number of properties affected by sewage flooding, per 10,000.
Companies with the lowest numbers perform best for this service.


Wessex Water perform 3rd out of 11 companies overall on this measure:

	No. properties affected per 1,000	
South West Water	0.76	 <p>Better performance</p>  <p>Worse performance</p>
Dwr Cymru	1.36	
Wessex Water	1.42	
Severn Trent Water	1.61	
Anglian Water	1.73	
Northumbrian Water	1.84	
Hafren Dyfrdwy	2.34	
Yorkshire Water	2.83	
United Utilities	2.97	
Southern Water	3.04	
Thames Water	3.46	

Only the companies that provide sewerage services are included in this comparison

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Pollution of rivers and bathing waters



What does this mean? Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale.


How are Wessex Water performing on this? Water companies are measured on the number of incidents of pollution of rivers and streams. The measure used is number of incidents per 10,000 km of sewer. Wessex Water currently have 20.6 pollution incidents per 10,000 km of sewer.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer.
How will they do it?	<ul style="list-style-type: none"> Installing more monitors to predict when incidents might occur Using artificial intelligence to improve their response times Cleaning sewers more often to stop problems before they occur.
Cost on bill	This will add £5 to the average annual bill (excluding inflation) by 2030.

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Wessex Water
YTL GROUP

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How are Wessex Water performing on this? Water companies are measured on the number of incidents of pollution of rivers and streams. The measure used is number of incidents per 10,000 km of sewer. Wessex Water currently have 20.6 pollution incidents per 10,000 km of sewer.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer.
How will they do it?	<ul style="list-style-type: none"> Installing more monitors to predict when incidents might occur Using artificial intelligence to improve their response times Cleaning sewers more often to stop problems before they occur.
Cost on bill	Based on an example annual bill of £1000 today, this will add £12 to the annual bill by 2030 (excluding inflation).



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How do water companies perform on the number of incidents of pollution of rivers and streams?



The measure used is the number of incidents per 10,000 km of sewer.
Companies with the lowest numbers perform best for this service.

Wessex Water perform 2nd out of 11 companies overall on this measure:


	No. incidents per 10,000 km of sewer	
United Utilities Water	17.7	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="margin-bottom: 10px;">Better performance</div> <div style="margin-bottom: 10px;"></div> <div style="margin-bottom: 10px;"></div> <div>Worse performance</div> </div>
Wessex Water	20.6	
Severn Trent Water	21.8	
Dwr Cymru	22.9	
Northumbrian Water	23.0	
Thames Water	24.9	
Yorkshire Water	27.4	
Anglian Water	33.8	
Hafren Dyfrdwy	39.8	
South West Water	86.6	
Southern Water	93.6	

Only the companies that provide sewerage services are included in this comparison

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Removing everyone from water poverty



What does this mean? Water poverty is when a household spends more than 5% of its disposable income on the water bill.

What is the current situation? Wessex Water have already given financial support to 55,000 households in water poverty. This is known as a 'social tariff' as the support is paid for through other customers' bills. There are likely to be many more households in the region who need help in the future.


What is the plan for this?

Benefit by 2030	Remove everyone from water poverty by 2030, so all customers will be able to afford their bill.
How will they do it?	<ul style="list-style-type: none"> Giving financial support to more customers in water poverty - increasing assistance to help around 100,000 households in total Continuing to work with partners such as Citizens Advice Making it easier to get support, through automatic bill reductions Funding community projects.
Cost on bill	This will add £12 to the average annual bill (excluding inflation) by 2030 for all those customers not on a social tariff.

STIM 10_WW_NHH

FOR YOU. FOR LIFE.
 Wessex Water
YTL GROUP

Removing everyone from water poverty



What does this mean? Water poverty is when a household spends more than 5% of its disposable income on the water bill.


What is the current situation? Wessex Water have already given financial support to 55,000 households in water poverty. This is known as a 'social tariff' as the support is paid for through other customers' bills. There are likely to be many more households in the region who need help in the future.

What is the plan for this?

Benefit by 2030	Remove everyone from water poverty by 2030, so all customers will be able to afford their bill.
How will they do it?	<ul style="list-style-type: none"> Giving financial support to more customers in water poverty - increasing assistance to help around 100,000 households in total Continuing to work with partners such as Citizens Advice Making it easier to get support, through automatic bill reductions Funding community projects.
Cost on bill	This will not add anything to your annual bill above what you pay today.

FOR YOU. FOR LIFE.
Wessex Water
YTL GROUP

Preventing excess nitrogen and phosphorous from entering rivers and sea



Legally required

What does this mean? Large parts of the natural environment in the region have been negatively affected by too much nitrogen and phosphorus entering rivers and seas from industry, wastewater and agriculture.


What is the current situation? There is new legislation to ensure the health of rivers and coastal water environments is restored by reducing the levels of nitrogen and phosphorous.

What is the plan for this?

Benefit by 2030	Restore the quality of rivers and coastal waters by preventing 1,500 tonnes of nitrogen and phosphorous from entering rivers and the sea.
How will they do it?	<ul style="list-style-type: none"> • Installing nitrogen and phosphorus removal technology at Wessex Water’s treatment works • Where they can, work in partnership with farmers and landowners to prevent nitrogen and phosphorous getting washed from the land into rivers and the sea • Creating wetland areas to naturally absorb nitrogen and phosphorous.
Cost on bill	This will add £57 to the average annual bill (excluding inflation) by 2030.

FOR YOU. FOR LIFE.
Wessex Water
YTL GROUP

Preventing excess nitrogen and phosphorous from entering rivers and sea



Legally required

What does this mean? Large parts of the natural environment in the region have been negatively affected by too much nitrogen and phosphorus entering rivers and seas from industry, wastewater and agriculture.


What is the current situation? There is new legislation to ensure the health of rivers and coastal water environments is restored by reducing the levels of nitrogen and phosphorous.


What is the plan for this?

Benefit by 2030	Restore the quality of rivers and coastal waters by preventing 1,500 tonnes of nitrogen and phosphorous from entering rivers and the sea.
How will they do it?	<ul style="list-style-type: none"> • Installing nitrogen and phosphorus removal technology at Wessex Water’s treatment works • Where they can, work in partnership with farmers and landowners to prevent nitrogen and phosphorous getting washed from the land into rivers and the sea • Creating wetland areas to naturally absorb nitrogen and phosphorous.
Cost on bill	Based on an example annual bill of £1000 today, this will add £137 to the annual bill by 2030 (excluding inflation).

FOR YOU. FOR LIFE.
Wessex Water
YTL GROUP

Reducing sewage spills





Legally required

What does this mean? When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea.


What is the current situation? Wessex Water have 1,300 storm overflows, which, when they spill, help reduce the risk of properties being flooded with sewage. Longer-term targets have been set by government to reduce the use of storm overflows.


What is the plan for this?

Benefit by 2030	Wessex Water will reduce spills at 148 sites, focusing on sensitive sites to reduce the environmental impact.
How will they do it?	<ul style="list-style-type: none"> Increasing storm water storage at sites Working with local communities to reduce the rain water entering the sewers Building natural solutions like wetlands to provide a form of treatment before it enters the river.
Cost on bill	This will add £23 to the average annual bill (excluding inflation) by 2030.

FOR YOU. FOR LIFE.
Wessex Water
YTL GROUP

Reducing sewage spills





Legally required













What does this mean? When there is too much rainfall for sewers to handle, storm overflows allow rain water, mixed with sewage, to escape into a separate pipe which eventually flows into a river or the sea.

What is the current situation? Wessex Water have 1,300 storm overflows, which, when they spill, help reduce the risk of properties being flooded with sewage. Longer-term targets have been set by government to reduce the use of storm overflows.

What is the plan for this?





Benefit by 2030	Wessex Water will reduce spills at 148 sites, focusing on sensitive sites to reduce the environmental impact.
How will they do it?	<ul style="list-style-type: none"> Increasing storm water storage at sites Working with local communities to reduce the rain water entering the sewers Building natural solutions like wetlands to provide a form of treatment before it enters the river.
Cost on bill	Based on an example annual bill of £1000 today, this will add £55 to the annual bill by 2030 (excluding inflation).

These are **key elements** of the business plans only and do not make up the full set of activities or costs.

By 2030...	£/yr
 Maintain target level for supply interruptions from 2025 to 2030	£0
 Reduce leakage per property per day from 83.6 litres in 2025 to 78 in 2030	£5
 Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£4
 Developing new water supplies	£13
 Install 350,000 smart water meters across the whole South West Water region	£2
 Improving tap water quality	£8
 Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£2
 Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£2
 Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£5
 Remove everyone from water poverty	£12
 Prevent excess nitrogen & phosphorous entering rivers and the sea (<i>legally required</i>)	£57
 Reduce sewage spills at 148 sites, focusing on sensitive sites (<i>legally required</i>)	£23

£/yr means the **added amount** (excluding inflation) on to the **average** current annual bill by 2030.

These are **key elements** of the business plans only and do not make up the full set of activities or costs.

By 2030...	£/yr
 Maintain target level for supply interruptions from 2025 to 2030	£0
 Reduce leakage per property per day from 83.6 litres in 2025 to 78 in 2030	£14
 Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£12
 Developing new water supplies	£37
 Install 350,000 smart water meters across the whole South West Water region	£7
 Improving tap water quality	£23
 Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£5
 Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£5
 Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£12
 Remove everyone from water poverty	£0
 Prevent excess nitrogen & phosphorous entering rivers and the sea (<i>legally required</i>)	£137
 Reduce sewage spills at 148 sites, focusing on sensitive sites (<i>legally required</i>)	£55

£/yr means the **added amount** based on an **example annual bill of £1000** today (excluding inflation) by 2030



Bournemouth Water's plan for water services 2025-30

These are **key elements** of Bournemouth Water's business plan only, and do not make up the full set of activities or costs.

By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage per property per day from 83.6 litres in 2025 to 78 in 2030	£5
	Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£4
	Developing new water supplies	£13
	Install 350,000 smart water meters across the whole South West region	£2
	Improving tap water quality	£8

£/yr means the **added amount** on to the **average** current annual bill (excluding inflation) by 2030



Bournemouth Water's plan for water services 2025-30

These are **key elements** of Bournemouth Water's business plan only, and do not make up the full set of activities or costs.

By 2030...		£/yr
	Maintain target level for supply interruptions from 2025 to 2030	£0
	Reduce leakage per property per day from 83.6 litres in 2025 to 78 in 2030	£14
	Reduce contacts about water quality from 1.33 per 1,000 population in 2025 to 1.1 per 1,000 in 2030	£12
	Developing new water supplies	£37
	Install 350,000 smart water meters across the whole South West region	£7
	Improving tap water quality	£22

£/yr means the **added amount** based on an **example annual bill of £500** today (excluding inflation) by 2030



Wessex Water's plan for sewerage services 2025-30

These are **key elements** of Wessex Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£2
Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£2
Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£5
Remove everyone from water poverty	£12
Prevent excess nitrogen and phosphorous entering rivers and sea <i>(legally required)</i>	£57
Reduce sewage spills at 148 sites, focusing on sensitive sites <i>(legally required)</i>	£23

£/yr means the **added amount** on to the **average current annual bill** (excluding inflation) by 2030



Wessex Water's plan for sewerage services 2025-30



These are **key elements** of Wessex Water's business plan only, and do not make up the full set of activities or costs.

By 2030...	£/yr
Reduce indoor sewer floods from 1.42 to 1.17 per 10,000 properties	£5
Reduce outdoor sewer floods from 19.2 to 14.5 per 10,000 properties	£5
Reduce pollution incidents from 20.6 to 15.7 per 10,000 km of sewer	£12
Remove everyone from water poverty	£0
Prevent excess nitrogen and phosphorous entering rivers and sea <i>(legally required)</i>	£137
Reduce sewage spills at 148 sites, focusing on sensitive sites <i>(legally required)</i>	£55

£/yr means the **added amount** based on an **example annual bill of £500** today (excluding inflation) by 2030

A photograph showing two people in a meeting. One person, wearing a blue shirt and a black watch, is pointing at a document with a black pen. The other person, wearing a black and white striped shirt, is looking at the document. The document contains various data visualizations, including bar charts, line graphs, and infographics. A semi-transparent blue banner is overlaid across the middle of the image, containing the text 'Appendix 3 – Technical and assurance'.

Appendix 3 – Technical and assurance

TOTAL SAMPLE	QUALITATIVE  203	QUANTITATIVE  2381
Sampling	<p>95 Household customers (HH) 24 Future Customers (FUT) 21 Health vulnerable (H-VULN) 18 Economically Vulnerable (E-VULN) 45 NHH (SME's and large users)</p>	<p>Water and sewerage customers receiving water supply from SWW (983). Water only customers receiving water supply from BRL (716). Water only customer receiving water form Bournemouth Water (682).</p>
Method	<p>7 x 3-hour Deliberative events (in-person) (HH, E-VULN & FUT) 22 x online reconvened groups - 90 min + 90 min (NHH) 24 depth interviews (H-VULN, LARGE NHH)</p>	<ul style="list-style-type: none"> • HH: Push to web <ul style="list-style-type: none"> • N=5880 customers invited for SWW supply area • N=4800 customers invited for BRL supply area • N=4260 customers invited for BW supply area • One reminder was sent to all customers (excluding those who had completed the survey after the first invitation) • NHH: Telephone push to online using business directories & online panel sample
Incentive	<p>£50-100 depending on method/sample (£200 for NHH)</p>	<p>HH - £5 Amazon or Love2Shop voucher NHH - £25 Amazon voucher or £25 donation to Water Aid (or standard panel incentives for B2B panellists)</p>

Sample & method

- No deviations from the prescribed sample & method (in qualitative and quantitative stages)
- Included one reminder in the quantitative*

Questionnaire

- Some minor changes
- Included age bands (agreed by Ofwat)
- Question labelling where Ofwat did not include this detail
- Small (functional) edits to avoid ambiguity esp. relevant to clarify which company
- Printed versions needed additional signposting for routing

Joint plans

- Approach to reminders consistent across SBB companies (SWW, BRL and BW)
- Fieldwork timing slightly different (SWW started later than BRL & BW)

Plan stimulus

- Cognitive testing* led to changes that were agreed by Ofwat and led to industry-wide guidance amends

Quality Control & Analysis

- All according to guidance e.g. removal of 'speeders'



7 x 3hr face-to-face deliberative events

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 3hr event each in person

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Micro NHH

6 x 90min reconvened online focus groups

Stage 1: Participants to attend first 90 min focus group

Stage 2: Participants to attend second 90 min focus group

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Larger NHH

16 x 1hr online video depth

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections

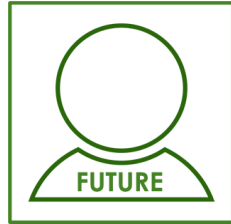


24 x 1hr online video depth

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



4 x 3hr face-to-face deliberative events

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 3hr event each in person

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Micro NHH

3 x 90 min reconvened online focus groups

Stage 1: Participants to attend first 90 min focus group

Stage 2: Participants to attend second 90 min focus group

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Larger NHH

8 x 1hr online video depth

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



8 x 1hr online video depth

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections

Total sample achieved = 99



Household sample achieved = 52/48

- **SEG:** 9 x AB, 28 x C1C2, 10 x DE, 7 x unknown
- **Age:** 16 x under 45, 31 x over 45, 7 x unknown
- **Gender:** 25 x F, 28 x M, 1 x unknown
- **Metering:** 31 x metered, 7 x unmetered, 16 x don't know
- **Recruitment:** 47 x list opt ins, 7 x extras



Economically vulnerable sample achieved = 5/8

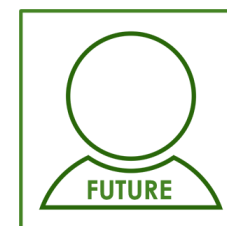
- **Age:** 3 x under 45, 3 x over 45
- **Gender:** 2 x F, 3 x M
- **Metering:** 3 x metered, 2 x unmetered
- **Social tariff:** 0 x ST, 5 x eligible for ST
- **Recruitment:** 5 x free find



Health vulnerable sample achieved = 8/8

- **Age:** 2 x under 45, 6 x over 45
- **Gender:** 6 x F, 2 x M
- **Metering:** 6 x metered, 2 x unmetered
- **PSR status:** 3 x on PSR, 3 x not, 2 unsure
- **Examples of vulnerability include:** Chronic fatigue, limited mobility, chronic pain
- **Recruitment:** 3 X list opt ins 5 X free find

Total number of responding to invitation letter: c240 opted in to participate



Future customer sample achieved = 8/8

- **SEG:** 4 x C1C2
- **Age:** 4 x 18-30
- **Gender:** 3 x F, 1 x M
- **Recruitment:** 4 x free find



Non-household sample achieved = 26/26

- **Size:** 18 x Micro NHH, 7 x larger NHH (over 10 employees)
- **Examples of business type include:** Construction, leisure, hospitality, manufacturing, retail, tourism
- **Usage type:** 16 x domestic, 7 x non-domestic
- **Usage volume:** 8 x low spend, 17 x high spend



Method – Quantitative Research Phase (South West Water)



Household



Non household



Fieldwork dates

11 Aug – 11 Sep 2023

11 Aug – 11 Sep 2023



Sampling

- A randomly selected sample was drawn from the total customer database, within IMD quintile in proportions as prescribed by Ofwat.
- Invitations were sent by email to those customers for whom an email address was held, and by letter to the remainder
 - N=10,000 customers invited for SWW
 - One reminder was sent to all customers (excluding those who had completed the survey after the first invitation)

Two approaches were used:

- Telephone push to online: Dunn & Bradstreet business directory used to generate list of telephone numbers of organisations in each supply area. Numbers randomly called, in order to gather email address and send on email invitation to the survey
- Commercial online business-to-business panels: 5 panel partners were enlisted to provide online sample
- IP address was collected in order to remove any duplicates across the two methods.



Format

Online survey (link provided in emails and letters) plus printed versions provided upon request for those who could not complete online

Online survey only link provided in email)



Incentive

£5 Amazon or Love2Shop voucher

£25 Amazon voucher or £25 donation to Water Aid (or standard panel incentives for B2B panellists)



Response rate

Across the three supply areas (after one reminder):
 c. 10.5% completion rate in response to email invitations
 c. 3.8% completion rate in response to letter invitations

Response rate to the telephone push to online approach was very low at c.0.5%, so online panels needed to be used for the large majority of surveys. Panels used:
Dynata, Bilendi, Pure Spectrum, Walr, Mindforce



2 x 3hr face-to-face deliberative events

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 3hr event each in person

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Micro NHH

2 x 90min reconvened online focus groups

Stage 1: Participants to attend first 90 min focus group

Stage 2: Participants to attend second 90 min focus group

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Larger NHH

4 x 1hr online video depth

Stage 1: Participants go through pre-read pack & fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



8 x 1hr online video depth

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Total sample achieved = 62/64

Top up group of 4 participants to be completed w/c 5th June



Household sample achieved = 25/24

- **SEG:** 5 x AB, 13 x C1C2, 6 x DE, 1 x unknown
- **Age:** 11 x under 45, 13 x over 45, 1 x unknown
- **Gender:** 10 x F, 15 x M
- **Metering:** 11 x metered, 10 x unmetered, 4 x don't know
- **Recruitment:** 24 x list opt ins, 1 x freefind



Future customer sample achieved = 8/8

- **SEG:** 1 x AB, 6 x C1C2, 1 x DE
- **Age:** 8 x 18-30
- **Gender:** 4 x F, 4 x M
- **Recruitment:** 8 x free find



Non-household sample achieved = 16/16

- **Size:** 12 x micro NHH, 4 x larger NHH (over 10 employees)
- **Examples of business type include:** consultancies, accountants, hairdressers
- **Usage type:** 11 x domestic, 5 x non-domestic
- **Usage volume:** 8 x low spend, 8 x high spend
- **Recruitment:** 16 x free find

Total number of opt-ins: 147



Health vulnerable sample achieved = 7/8

- **Age:** 1 x under 45, 6 x over 45
- **Gender:** 5 x F, 2 x M
- **Metering:** 3 x metered, 4 x unmetered
- **PSR status:** 7 x on or eligible for PSR
- **Examples of vulnerability include:** mental health problems, physical health conditions
- **Recruitment:** 3 x list opt ins, 4 x free find



Economically vulnerable sample achieved = 7/8

- **Age:** 3 x under 45, 4 x over 45
- **Gender:** 3 x F, 4 x M
- **Metering:** 4 x metered, 3 x unmetered
- **Social tariff:** 1 x ST, 3 x eligible for ST, 3 x don't know
- **Recruitment:** 6 x free find, 1 x list opt in



Method – Quantitative Research Phase (Bristol Water)



Household



Non household



Fieldwork dates

28 Jul – 03 Sep 2023

4 Aug – 5 Sep 2023



Sampling

- For each supply area a randomly selected sample was drawn from the total customer database, within IMD quintile in proportions as prescribed by Ofwat.
- Invitations were sent by email to those customers for whom an email address was held, and by letter to the remainder
 - N=8,800 for each of BRL supply areas
- One reminder was sent to all customers (excluding those who had completed the survey after the first invitation)

Two approaches were used:

- Telephone push to online: Dunn & Bradstreet business directory used to generate list of telephone numbers of organisations in each supply area. Numbers randomly called, in order to gather email address and send on email invitation to the survey
- Commercial online business-to-business panels: 5 panel partners were enlisted to provide online sample
- IP address was collected in order to remove any duplicates across the two methods.



Format

Online survey (link provided in emails and letters) plus printed versions provided upon request for those who could not complete online

Online survey only link provided in email)



Incentive

£5 Amazon or Love2Shop voucher

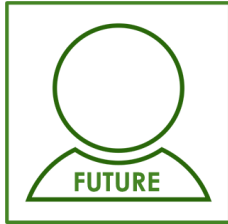
£25 Amazon voucher or £25 donation to Water Aid (or standard panel incentives for B2B panellists)



Response rate

Across the three supply areas (after one reminder):
 c. 7% completion rate in response to email invitations
 c. 6.4% completion rate in response to letter invitations

Response rate to the telephone push to online approach was very low at c.0.5%, so online panels needed to be used for the large majority of surveys. Panels used:
Dynata, Bilendi, Pure Spectrum, Walr, Mindforce



1 x 3hr face-to-face deliberative events

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 3hr event each in person

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Micro NHH

1 x 90min reconvened online focus groups

Stage 1: Participants to attend first 90 min focus group

Stage 2: Participants to attend second 90 min focus group

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Larger NHH

4 x 1hr online video depth

Stage 1: Participants go through pre-read pack & fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



8 x 1hr online video depth

Stage 1: Participants to go through pre-read pack and fill out pre-task survey

Stage 2: Participants to attend 1 x 1hr online depth

Stage 3: Participants to complete post-task survey and answer questions based on their personal bill projections



Total sample achieved = 41

Total number of opt-ins: 81



Household sample achieved = 18/16

- **SEG:** 3 x AB, 4 x C1C2, 7 x DE
- **Age:** 6 x under 45, 8 x over 45
- **Gender:** 10 x F, 8 x M
- **Metering:** 6 x metered, 8 x unmetered
- **Recruitment:** 14 x list opt ins, 4 x extras (free find?)



Future customer sample achieved = 8/8

- **SEG:** 8 x C1C2
- **Age:** 8 x 18-30
- **Gender:** 4 x F, 4 x M
- **Recruitment:** 8 x free find



Non-household sample achieved = 3/10

- **Size:** 3 x micro NHH
- **Examples of business type include:** restaurant, recruitment, transport
- **Usage type:** 2 x domestic, 1 x domestic and non-domestic
- **Usage volume:** 3 x low spend
- **Recruitment:** 3 x free find



Health vulnerable sample achieved = 6/8

- **Age:** 2 x under 45, 4 x over 45
- **Gender:** 3 x F, 3 x M
- **Metering:** 4 x metered, 2 x unmetered
- **PSR status:** 5 x on or eligible for PSR
- **Examples of vulnerability include:** physical health conditions, mental health problems
- **Recruitment:** 5 x list opt ins, 1 x free find



Economically vulnerable sample achieved = 6/8

- **Age:** 1 x under 45, 5 x over 45
- **Gender:** 4 x F, 2 x M
- **Metering:** 4 x metered, 2 x unmetered
- **Social tariff:** 1 x ST, 2 x eligible for ST, 3 x don't know
- **Recruitment:** 3 x free find, 3 x flagged social tariff



Method – Quantitative Research Phase (Bournemouth Water)



Household



Non household



Fieldwork dates

28 Jul – 03 Sep 2023

4 Aug – 5 Sep 2023



Sampling

- For each supply area a randomly selected sample was drawn from the total customer database, within IMD quintile in proportions as prescribed by Ofwat.
- Invitations were sent by email to those customers for whom an email address was held, and by letter to the remainder
 - N=8,800 for each of BW supply areas
- One reminder was sent to all customers (excluding those who had completed the survey after the first invitation)

Two approaches were used:

- Telephone push to online: Dunn & Bradstreet business directory used to generate list of telephone numbers of organisations in each supply area. Numbers randomly called, in order to gather email address and send on email invitation to the survey
- Commercial online business-to-business panels: 5 panel partners were enlisted to provide online sample
- IP address was collected in order to remove any duplicates across the two methods.



Format

Online survey (link provided in emails and letters) plus printed versions provided upon request for those who could not complete online

Online survey only link provided in email)



Incentive

£5 Amazon or Love2Shop voucher

£25 Amazon voucher or £25 donation to Water Aid (or standard panel incentives for B2B panellists)



Response rate

Across the three supply areas (after one reminder):
 c. 7.9% completion rate in response to email invitations
 c. 5.6% completion rate in response to letter invitations

Response rate to the telephone push to online approach was very low at c.0.5%, so online panels needed to be used for the large majority of surveys. Panels used:
Dynata, Bilendi, Pure Spectrum, Walr, Mindforce



- Data weighting was applied following Ofwat guidance
- Five layers of weighting were applied based on the principle of representativeness:
 - Age (within supply areas)
 - Gender (within supply areas)
 - Index of Multiple Deprivation (IMD) quintile (within supply areas)
 - Overall proportions of household : non household based on overall water use (within supply areas)
 - Geographic representation – overall number of customers in each supply area

- To achieve the targets, rim weighting was applied via specialist survey data processing software (Merlin)
- A technical weighting report is available separately
- Key outputs of the weighting report are:
 - Overall unweighted base size: 2,381
 - Overall effective weighted sample size: 1742
 - Min weight: 0.104
 - Max weight: 2.95

PART ONE Weighting for HOUSEHOLD sample within each region			
	SWW	BRL	BW
Age			
Aged 18 to 34 years	16%	21%	16%
Aged 35 to 44 years	14%	18%	16%
Aged 45 to 54 years	17%	18%	16%
Aged 55 to 64 years	18%	17%	17%
Aged 65 to 74 years	17%	13%	16%
Aged 75 years and over	16%	12%	16%
No answer (weighted to survey %)	2%	1%	3%

Q11 Gender			
Female (code 1)	0%	0%	0%
Male (code 2)	0%	0%	0%
Identify in another way / NS (weighted to survey)	6%	4%	5%

IMD Quintile (from sample)			
1	12%	13%	10%
2	28%	17%	16%
3	28%	19%	22%
4	20%	26%	24%
5	12%	25%	28%

PART TWO - Overall sample within each region			
	SWW	BRL	BW
Customer type (based on total water use)			
Household	69%	76%	69%
Non household	31%	24%	31%

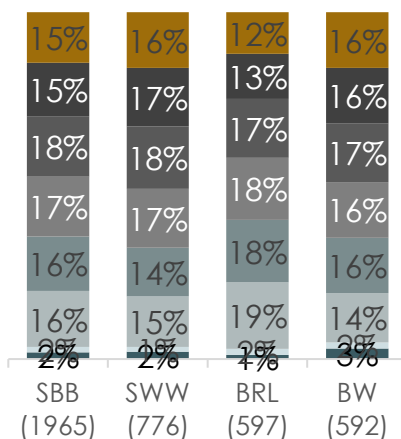
PART THREE OF WEIGHTING - Overall weight of each region applies to combined			
South West Water total (HH and NHH)	53%		
Bournemouth Water Total (HH and NHH)	13%		
Bristol Water Total (HH and NHH)	34%		

Household customer profile

The data for household customers is weighted within supply area to age and gender based on bill payer information, and Index of Multiple Deprivation. The three geographic supply areas are also weighted to their natural proportions overall

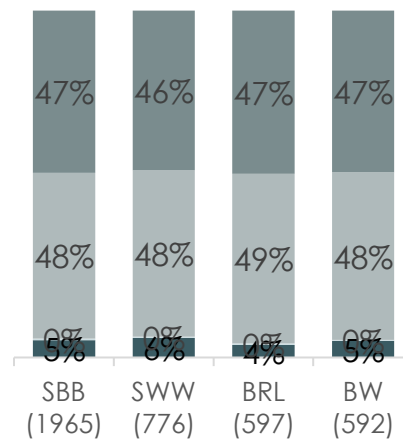
Age

- 75+
- 65-74
- 55-64
- 45-54
- 35-44
- 25-34
- 18-24
- Prefer not to say



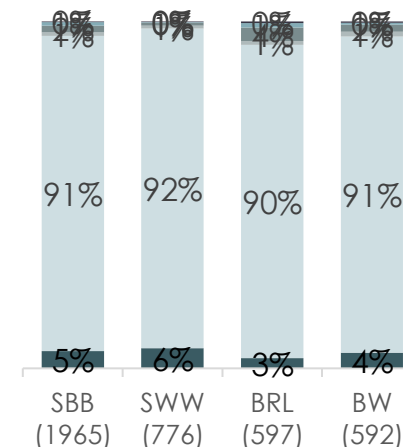
Gender

- Male
- Female
- Other
- Not stated



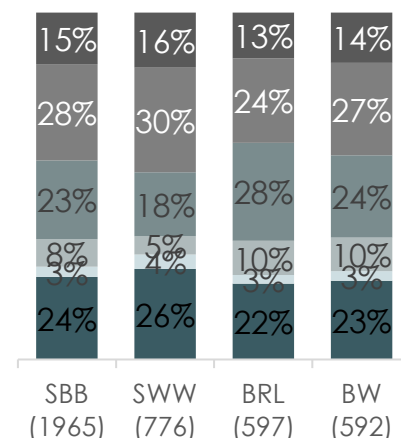
Ethnicity

- Other
- Black
- Asian
- Mixed
- White
- Not stated



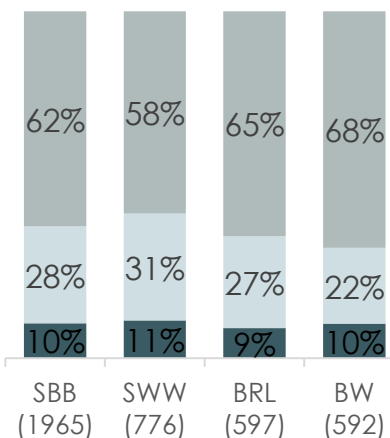
Household Income (pre tax)

- Under £16K
- £16K-36.9K
- £37K-72.8K
- Over £72.8K
- Don't know
- Not stated



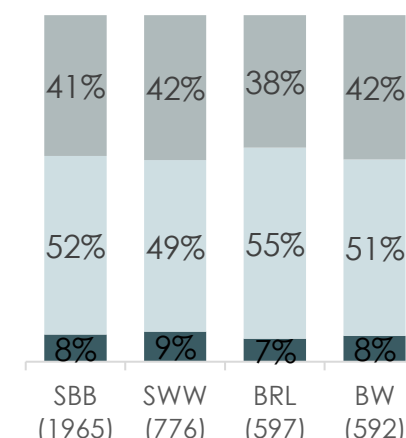
Social Grade

- ABC1
- C2DE
- Not stated



Vulnerability

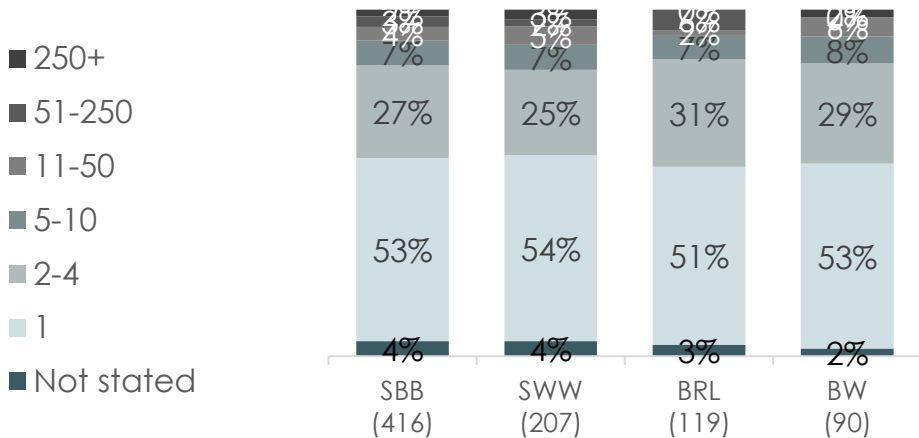
- Any
- None
- Not stated



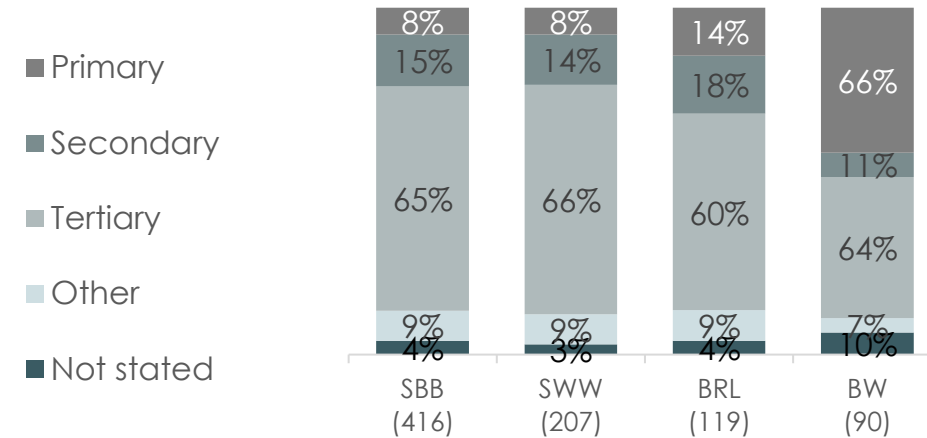
Non-household customer profile

The majority of non-household customers surveyed are SMEs. Sector is unweighted but broadly in line with expected profile of Standard Industrial Classification

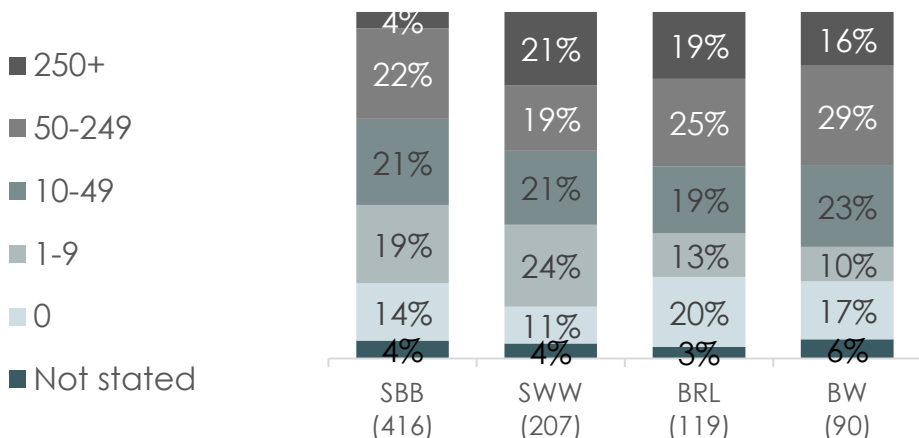
Number of UK sites



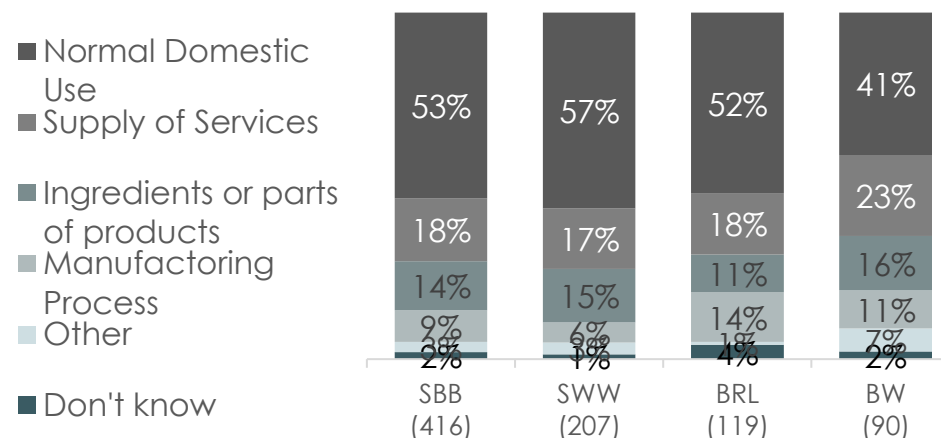
Sector



Number of UK employees



Number of UK employees



Q18. How many sites in the UK does your organisation operate from?; **Q19** How many employees does your organisation have in the UK?; **Q20.** Which of the following best defines the core activity of your organisation? **Q17.** How does your organisation mainly use water at its premises?

Base Total non-household bill payers SWW (207) BRL (119) BW (90) **WEIGHTED % FIGURES ARE DISPLAYED and UNWEIGHTED BASE SIZES**



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