

Affordability and acceptability testing – research materials

Qualitative – household: recruitment screener, pre-read, discussion guide and stimulus. Audio version of pre-read was made available.

Qualitative – vulnerable customers: pre-read (audio version), discussion guide and stimulus.

Qualitative – non household: recruitment screener, pre-read, discussion guide and stimulus

Quantitative – survey and stimulus

**Business plan
2025-2030**



Wessex Water
YTL GROUP

FOR YOU. FOR LIFE.

Overview of the sample

		Wessex	Bristol	Bournemouth
18 'cognitive depths': online; 45-60 minutes; spread of age, gender SEG (11th-14th April)				
Free find		6	6	6
List 'opt ins'		-	-	-
5 x face to face deliberative events x 3 hours				
		BATH (24)		
Free find	We'll have 2 or 3 (or 4 in the case of Bournemouth) tables of 8 per event.	8 x Future customers		
List 'opt ins'		16 x HH customers		
		SALISBURY (16)		
Free find	We can recruit economically vulnerable from opt ins if they occur on the list...but we've included as a sample for free find recruitment as this is the likeliest to be successful.	-		
List 'opt ins'		16 x HH customers		
		TAUNTON (24)		
Free find	Assume 10% overage (as per your original quote – for this and all samples)	4 x Economically vulnerable		
List 'opt ins'		16 x HH customers 4 x Econ vuln (flagged Social Tariff)		
			BRISTOL (24)	
Free find			8 x Future customers	
List 'opt ins'			16 x HH customers	
			WESTON SUPER MARE (24)	
Free find			4 x Economically vulnerable customers	
List 'opt ins'			16 x HH customers 4 x Econ vuln (flagged Social Tariff)	
				BOURNEMOUTH (32)
Free find				8 x Future customers 4 x Economically vulnerable customers
List 'opt ins'				16 x HH customers 4 x Econ vuln (flagged Social Tariff)
Online depths with health vulnerable – 1 hour				
Free find	We will offer an incentive for carers (I've put in £50 for respondent and £50 for carer)	4	4	4
List 'opt ins'		4 (flagged PSR)	4 (flagged PSR)	4 (flagged PSR)
Reconvened online groups with MICRO NHH (i and ii) – 1.5 hours + 1.5 hours				
Free find		3 groups of 6 NHH (18 in total)	2 groups of 6 NHH (12 in total)	1 group of 6 NHH (6 in total)
List 'opt ins'		-	-	-
Online depths with larger NHH up to 1 hour				
Free find		8	4	4
List 'opt ins'		-	-	-

PROJECT SCREENER

Project Number: xxxx

Project Name: **Wessex Water, Bristol Water, Bournemouth Water AAT**

Project Contact: Collette Gartside

Client: Blue Marble

RESEARCH OVERVIEW:

This is for Wessex Water, Bristol Water and Bournemouth Water and will involve recruiting respondents for depths and respondents for f2f deliberative events to take part in a study testing Acceptability and Affordability of elements of Wessex Water, Bristol Water and Bournemouth Water's investment plans. This will allow the regulator, Ofwat, to compare how customers of each water company respond to individual business plans and the impact on their bills.

	WATER SUPPLY	WASTEWATER SERVICES
WESSEX	Wessex	Wessex
BRISTOL	Bristol	Wessex
BOURNEMOUTH	Bournemouth	Wessex

Stage one – Cog depths

- **Cognitive depths:** 18 x 45-60 minute online depths conducted via Zoom/Teams
 - **11th-14th April**
 - **6 x WESSEX-ONLY**
 - **6 x BRISTOL**
 - **6 x BOURNEMOUTH**

Stage two – Main phase:

- **6 x 3 hour f2f deliberative events**
 - **WESSEX Bath – 24 customers**
 - 3rd May 6-9pm
 - Macdonald Bath Spa Hotel - Sydney Road, Bathwick, Bath BA2 6NS
 - **WESSEX Salisbury – 16 customers**
 - 4th May 6-9pm
 - The Guildhall, Salisbury, Wiltshire SP1 1JH
 - **WESSEX Taunton – 24 customers**
 - 5th May 11am-2pm
 - Albermale Centre, Albemarle Rd, Taunton, TA1 1BA
 - **BRISTOL Weston Super Mare – 24 customers**
 - 3rd May 6-9pm
 - The Royal Hotel, 1 S Parade, Weston-super-Mare, BS23 1JP
 - **BRISTOL Bristol – 24 customers**
 - 4th May 6-9pm
 - St Werburghs Community Centre, Horley Road, St Werburghs, Bristol, BS2 9TJ
 - **BOURNEMOUTH Bournemouth – 32 customers**
 - 17th May 6-9pm
 - Kinson Community Centre, Pelhams Park, Millhams Road, Bournemouth, BH10 7LH
- **24 x 1hr Online depths with health vulnerable**

- **8 x WESSEX-ONLY CUSTOMERS, 8 x BRISTOL CUSTOMERS**
 - w/c 1st May onwards
- **8 x BOURNEMOUTH WATER**
 - w/c 8th May onwards

In another screener:

- **16 x 1hr depths with larger NHH**
 - w/c 1st May onwards
- **6 x 90 minute reconvened online groups with MICRO NHH customers (6 per group)**
 - **3 x Bath, 2 x Bristol, 1 x Bournemouth**
 - **1st round** – w/c 8th May
 - **2nd round** – w/c 15th May

Incentive:

- Incentive costs are set at:
 - £100 for HH deliberative events (3 hours + 20 minute pre-task)
 - £50 for cognitive depths
 - £200 for MICRO NHH reconvened groups
 - £100 for larger NHH 1 hour interview
 - £50 for 1 hour interview with vulnerable customers with a further £50 for carer/supporter.
- Payments will be made via BACs (or voucher if preferred) and may take up to **5 working days** following research completion.

Overall sample structure:

Stage 1	Quotas
<p>6 cognitive depths per region</p> <p>45-60 minutes</p>	<p>Wessex:</p> <ul style="list-style-type: none"> ● 6 x HH customers (A) <ul style="list-style-type: none"> ○ Spread of age ○ 50:50 gender mix ○ SEG: 2 x AB, 2 x C1C2, 2 x DE <p>Bristol:</p> <ul style="list-style-type: none"> ● 6 x HH customers (A) <ul style="list-style-type: none"> ○ Spread of age ○ 50:50 gender mix ○ SEG: 2 x AB, 2 x C1C2, 2 x DE <p>Bournemouth:</p> <ul style="list-style-type: none"> ● 6 x HH customers (A) <ul style="list-style-type: none"> ○ Spread of age ○ 50:50 gender mix ○ SEG: 2 x AB, 2 x C1C2, 2 x DE
MAIN STAGE	Quotas
<p>WESSEX BATH – deliberative event with HH customers</p> <p>24 respondents (8 per table)</p> <p>3 hours</p>	<p>8 x Future customers (FREEFIND) (C)</p> <ul style="list-style-type: none"> ● See definition below <p>16 x HH customers (LISTS) (A)</p> <ul style="list-style-type: none"> ● See definition below

WESSEX SALISBURY – deliberative event with HH customers 16 respondents (8 per table) 3 hours	16 x HH customers (LISTS) (A) <ul style="list-style-type: none"> • See definition below
WESSEX TAUNTON – deliberative event with HH customers 24 respondents (8 per table) 3 hours	4 x Economically vulnerable customers (FREEFIND) (Bi) <ul style="list-style-type: none"> • See definition below 16 x HH customers (LISTS) (A) <ul style="list-style-type: none"> • See definition below 4 x Economically vulnerable (flagged social tariff) (LISTS) (Bi) <ul style="list-style-type: none"> • See definition below
BRISTOL WESTON SUPER MARE – deliberative event with HH customers 24 respondents (8 per table) 3 hours	4 x Economically vulnerable customers (FREEFIND) (Bi) <ul style="list-style-type: none"> • See definition below 16 x HH customers (LISTS) (A) <ul style="list-style-type: none"> • See definition below 4 x Economically vulnerable (flagged social tariff) (LISTS) (Bi) <ul style="list-style-type: none"> • See definition below
BRISTOL BRISTOL – deliberative event with HH customers 24 respondents (8 per table) 3 hours	8 x Future customers (FREEFIND) (C) <ul style="list-style-type: none"> • See definition below 16 x HH customers (LISTS) (A) <ul style="list-style-type: none"> • See definition below
BOURNEMOUTH – deliberative event with HH customers 32 respondents (8 per table) 3 hours	8 x Future customers (FREEFIND) (C) <ul style="list-style-type: none"> • See definition below 4 x Economically vulnerable customers (FREEFIND) (Bi) <ul style="list-style-type: none"> • See definition below 16 x HH customers (LISTS) (A) <ul style="list-style-type: none"> • See definition below 4 x Economically vulnerable (flagged social tariff) (LISTS) (Bi) <ul style="list-style-type: none"> • See definition below
ONLINE DEPTHS WITH HEALTH VULNERABLE 8 respondents 1 hour	4 x Health vulnerable customers (FREEFIND) (Bii) <ul style="list-style-type: none"> • See definition below 4 x Health vulnerable customers (flagged PSR) (LISTS) (Bii) <ul style="list-style-type: none"> • See definition below
RECONVENED ONLINE GROUPS WITH MICRO NHH CUSTOMERS 18 respondents (3 x groups)	18 x MICRO NHH CUSTOMERS (FREEFIND) (D) <ul style="list-style-type: none"> • See definition below

90 minutes	
ONLINE DEPTHS WITH LARGER NHH CUSTOMERS 16 respondents 1 hour	16 x LARGER NHH CUSTOMERS (FREEFIND) (E) <ul style="list-style-type: none"> See definition below

	Quotas	Other characteristics recorded
A HOUSEHOLD CUSTOMERS <i>MIX OF FREE FIND AND CUSTOMER LISTS</i>	Per table for deliberative events: <ul style="list-style-type: none"> 4 under 45; 4 over 45 4 males; 4 females SEG: 2 x AB; 2 x C1; 2 x C2; 2 x DE For depths: <ul style="list-style-type: none"> Spread of age 50:50 gender mix SEG: 2 x AB, 2 x C1C2, 2 x DE 	<ul style="list-style-type: none"> Presence of meter 'green' attitudes (using a simple 4 point scale) Digital use ** Vulnerable indicators *
**Digital exclusion – code statements 3 or 4 Thinking about your life and how you use digital channels such as email, websites, Apps, text messaging etc, which of the below would you say relates to you? <ol style="list-style-type: none"> I prefer to use digital channels I am able to use digital channels even if it is not my preference I prefer not to use digital channels if an alternative is available I don't use digital channels 		
**Health vulnerability indicators <ul style="list-style-type: none"> Health conditions that impact daily living e.g. the ability to work, the need for either daily care; or the need for targeted support to carry out tasks associated with normal living (shopping, cleaning, getting around) A mental health condition that sometimes or always impacts daily living in terms of working or managing certain tasks/situations A physical disability affecting daily living e.g. sight loss, hearing loss, limited mobility Short term health issue: injury, surgery/post op recovery or serious illness that is temporarily impacting the ability to carry on with life in the normal way On a company PSR 		

	Quotas	Other characteristics recorded
Bi HOUSEHOLD CUSTOMERS IN ECONOMIC VULNERABILITY: on low	4 on ST (list recruited) 4 eligible for ST (freefind) 4 males; 4 females 4 under 45; 4 over 45	<ul style="list-style-type: none"> Presence of meter 'green' attitudes (using a simple 4 point scale) Vulnerable indicators * Digital use **

incomes (on or eligible for a social tariff)		
ST eligibility criteria (proxy for non-list recruits): 2 or more apply <ul style="list-style-type: none"> Household income less than £18k pa Struggle to pay household bills (to the point of being in arrears with some/all, using debt consolidation services) In receipt of benefits i.e. Universal Credit/pension credit payments 		

	Quotas per company region	Other characteristics recorded
Bii HOUSEHOLD CUSTOMERS IN HEALTH VULNERABILITY: with health vulnerability (on or eligible for PSR) <i>MIX OF FREE FIND AND CUSTOMER LISTS</i>	4 on PSR (list recruited) 4 eligible for PSR (freefind) 4 males; 4 females 4 under 45; 4 over 45	<ul style="list-style-type: none"> Presence of meter 'green' attitudes (using a simple 4 point scale) Vulnerable indicators * Digital use **

	Quotas per table	Other characteristics recorded
C FUTURE BILL PAYERS <i>FREE FIND</i>	<ul style="list-style-type: none"> Must be 18-30 4 males; 4 females Not currently responsible for the water bill Expect to be responsible for paying water bills in future 	<ul style="list-style-type: none"> Across sample, 8 x tertiary level educated; 8 x secondary level educated Record 'green' attitudes (using a simple 4 point scale) Record vulnerable indicators Record digital use

	Quotas across sample	Other characteristics
D MICRO NHH (Under 10 employees) <i>FREE FIND recruited using commercial and recruiter databases</i>	Representing 4 quartiles of water use and volume (spend) <ul style="list-style-type: none"> Domestic use – low spend Domestic use – high spend Non domestic use – low spend Non domestic use – high spend 	<ul style="list-style-type: none"> Spread of sector Range of locations

	Quotas across sample	Other characteristics
E LARGER NHH (10+ employees) <i>FREE FIND recruited using commercial and recruiter databases</i>	Representing 4 quartiles of water use and volume (spend) <ul style="list-style-type: none"> Domestic use – low spend Domestic use – high spend Non domestic use – low spend Non domestic use – high spend 	<ul style="list-style-type: none"> Spread of sector Range of locations

LIST RECRUITMENT INTRO – those who have registered via link

USE CUSTOMER REFERENCE TO CHECK RESPONDENT REGISTRATION AGAINST CUSTOMER DATA TO DETERMINE:

- **SUITABILITY OF PREFERRED LOCATION**
- **IF ON PSR**
- **IF ON SOCIAL TARIFF**

Hello, am I speaking to _____ (use name on registration)? My name is _____ and I am calling from Beam Fieldwork. Thank you for registering your interest in taking part in the upcoming research on behalf of [Wessex Water/Bristol Water and Wessex Water/Bournemouth Water and Wessex Water].

We would like to invite you to participate in the following research event (choose appropriate choice):

3 hour F2F event in:

- **WESSEX Bath**
 - 3rd May 6-9pm
 - Macdonald Bath Spa Hotel - Sydney Road, Bathwick, Bath BA2 6NS
- **WESSEX Salisbury**
 - 4th May 6-9pm
 - The Guildhall, Salisbury, Wiltshire SP1 1JH
- **WESSEX Taunton**
 - 5th May 11am-2pm
 - Albermale Centre, Albemarle Rd, Taunton, TA1 1BA
- **BRISTOL Weston Super Mare**
 - 3rd May 6-9pm
 - The Royal Hotel, 1 S Parade, Weston-super-Mare, BS23 1JP
- **BRISTOL Bristol**
 - 4th May 6-9pm
 - St Werburghs Community Centre, Horley Road, St Werburghs, Bristol, BS2 9TJ
- **BOURNEMOUTH Bournemouth**
 - 17th May 6-9pm
 - Kinson Community Centre, Pelhams Park, Millhams Road, Bournemouth, BH10 7LH

You will need to arrive 15 minutes before the event and it will last 3 hours. Refreshments will be served and you will receive £100 as a thank you for your time and to cover travel expenses. We will also provide you with an information pack that you will need to read beforehand – at least one day prior to taking part. This will be sent via email – if you will struggle to receive this information in online format please let us know and we can post it to you.

45-60 minute online telephone or video call on Microsoft Teams:

You will need to join the call 5 minutes early and it will last approximately 45 minutes to 1 hour. You will receive £50 as a thank you for your time. We will also provide you with an information pack that you will need to read beforehand – at least one day prior to taking part. This will be sent via email – if you will struggle to receive this information in online format please let us know and we can post it to you.

FREEFIND RECRUITMENT INTRO

Hello, my name is _____ and I am from _____, a market research company.

We are looking for people to take part in an exciting, in-depth project on behalf of [Wessex Water/Bristol Water and Wessex Water/Bournemouth Water and Wessex Water].

This is what the project is all about: all water companies make future plans on what investments are needed to make sure customers have secure, reliable and high-quality water services – both today and in the future. [Wessex Water/Bristol Water and Wessex Water/Bournemouth Water and Wessex Water] have been talking to thousands of customers, businesses and stakeholders over the last two years to help develop their future plans. They have now commissioned an independent market research agency, Blue Marble Research, to conduct further customer research.

This will enable you to get a rounded picture of these future plans and tell us how you feel about the proposals: this is important because all investment is ultimately paid for through customer bills – so it is key that you have your say.

We would like to invite you to participate in the following research event (choose appropriate choice):

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HOUSEHOLD SCREENER

Are you interested in taking part? If yes, then to ensure that we get a broad range of people involved we need to ask you a few additional questions about your life and attitudes. Are you happy for me to take you through some questions?

Q1: Contact details – for List recruits confirm information from registration form and take postal address to confirm postcode:

a) Respondent Name:	
b) Respondent Mobile Number:	
c) Respondent Email Address:	
d) Respondent Postal Address (postcode must be within 5 miles of research venue and must be their household address – not their business address)	
e) Customer reference (for List recruits)	

RECORD FOR INFO

FOR F2F EVENTS:

- CHECK POSTCODE AGAINST CUSTOMER DATA SHEET IF LISTS. IF IT IS DIFFERENT TO THE ONE LISTED, USE GOOGLE MAPS TO CHECK THAT IT IS WITHIN 5 MILES OF VENUE. IF NECESSARY, OFFER ALTERNATIVE LOCATION.
- IF FREEFIND, CHECK POSTCODE TO CHECK WHETHER WESSEX, BOURNEMOUTH OR BRISTOL WATER SUPPLY CUSTOMER AND CHECK IT IS WITHIN 5 MILES OF VENUE.

FOR ONLINE DEPTHS:

- IF FREEFIND, CHECK POSTCODE TO CHECK WHETHER WESSEX, BOURNEMOUTH OR BRISTOL WATER SUPPLY CUSTOMER

Q2: Age:

SEE SPECIFIC QUOTAS

Q3: Please can I ask you to confirm which gender you identify as?

Male	1
Female	2
Prefer to self-describe	3
Prefer not to say	4

SEE SPECIFIC QUOTAS

Q4A: For classification purposes, which of the following best describes the profession of the person in your household with the largest income.

Higher managerial/ professional/ administrative (e.g. Doctor, Solicitor, Board Director)	1	A
Intermediate managerial/ professional/ administrative (e.g. trainee Doctor or Solicitor, Director of small company, middle management)	2	B
Supervisory / junior managerial/ professional/ administrative (e.g. Office worker, Foreman, Salesperson)	3	C1
Student	4	C1
Skilled manual worker (e.g. Bricklayer, Carpenter, Plumber, Painter, HGV/Bus driver, pub/bar worker)	5	C2
Semi or unskilled manual work (e.g. Manual workers, apprentice, Caretaker, van driver, shop assistant)	6	D
Casual worker – not in permanent employment	7	E
Housewife/ Homemaker	8	E
Retired and living on state pension	9	E
Unemployed or not working due to long-term sickness	10	E
Full-time carer of other household member	11	E

SEE SPECIFIC QUOTAS

Q4B: Do you or does anyone in your household work for any of the following, or have worked at the following within the past 5 years?

	Yes	No
Any water service provider or job related to the water industry (e.g. water company or any of its affiliates e.g. Ofwat, Defra, CCW, DWI, EA)	CLOSE	

Q4C: What is your occupation:.....

MUST NOT BE ASSOCIATED WITH A WATER SERVICE PROVIDER E.G. WATER COMPANY OR ANY OF ITS AFFILIATES (OFWAT, DEFRA, CCW, DWI, EA). MUST NOT WORK IN MARKET RESEARCH, ADVERTISING, PR OR MEDIA.

Q4D: What is the highest level of education you have completed:

Schooling until age 16	1
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Schooling until age 18	2
Trade / technical school or college	3
University degree	4
Postgraduate degree	5

CODE 1, 2, 3 – CLASSIFY AS SECONDARY EDUCATION

CODE 4, 5 – CLASSIFY AS TERTIARY EDUCATION

SEE SPECIFIC QUOTAS FOR FUTURE CUSTOMERS

NO QUOTA FOR OTHER CUSTOMERS – JUST RECORD

Q5A: Who in your household is responsible for paying the water bill at home?

	I am solely responsible for paying this bill	I am jointly responsible for paying this bill	I do not pay this bill. It is the responsibility of someone else in the household (parent/the home owner)	I do not pay - this is paid through rent/landlord or other way
Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ALL (EXCEPT FUTURE CUSTOMERS) TO BE SOLELY OR JOINTLY RESPONSIBLE FOR PAYING WATER BILL

ALL FUTURE CUSTOMERS ARE TO NOT BE EITHER SOLELY OR JOINTLY RESPONSIBLE FOR PAYING THEIR WATER BILL

Q5B: Does your home have a water meter?

A water meter	YES <input type="checkbox"/>	NO <input type="checkbox"/>	UNSURE <input type="checkbox"/>	NO QUOTA
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NO QUOTA – RECORD FOR INFO ONLY

Q5C: Water companies offer some customers a lower bill if the income of the household is low. This is sometimes called a Social Tariff.

Are you in receipt of any support from your water provider?

a) Yes, I am	PLEASE RECORD WHAT SUPPORT SCHEME
b) No, I am not	
c) I don't know	

SOME CUSTOMERS MAY NOT KNOW THEY ARE ON A SOCIAL TARIFF, OR VICE VERSA. THIS QUESTION IS FOR INFO ONLY – FINANCIALLY VULNERABLE QUOTA SHOULD BE DETERMINED BY BEING RECORDED AS ON SOCIAL TARIFF IN CUSTOMER DATA, OR CODING AGREE TO AT LEAST 2 OUT OF 3 STATEMENTS AT NEXT QUESTION

IF YES, PLEASE RECORD NAME OF SCHEME(S) THEY RECEIVE

Q6: Which of the following statements apply to you?

	Agree	Disagree
Household income less than £18k pa	<input type="checkbox"/>	<input type="checkbox"/>
Struggle to pay household bills (to the point of being in arrears with some/all, using debt consolidation services)	<input type="checkbox"/>	<input type="checkbox"/>
In receipt of benefits e.g. Universal Credit/pension credit payments/means tested benefits	<input type="checkbox"/>	<input type="checkbox"/>

ECONOMICALLY VULNERABLE RESPONDENTS MUST CODE AGREE TO AT LEAST 2 OUT OF 3 STATEMENTS OR BE RECORDED AS ON A SOCIAL TARIFF IN CUSTOMER DATA

SEE SPECIFIC QUOTAS

Q7A: We are looking to include people who may need additional help and support due to a variety of reasons including health conditions. I'm going to show you a list of different circumstances which may or may not relate to you or someone in your household. Please can you tell me which if any of the following apply – and I will stress again, this is all in confidence.

- Health conditions that impact daily living e.g. the ability to work, the need for either daily care; or the need for targeted support to carry out tasks associated with normal living (shopping, cleaning, getting around)
- A mental health condition that sometimes or always impacts daily living in terms of working or managing certain tasks/situations
- A physical disability affecting daily living e.g. sight loss, hearing loss, limited mobility
- Short term health issue: injury, surgery/post op recovery or serious illness that is temporarily impacting the ability to carry on with life in the normal way
- On a company Priority Services Register (Recruiter to refer to customer data to see if respondent is on PSR, then confirm in screening)

SEE SPECIFIC QUOTAS – IF ANY OF THE ABOVE APPLY THE RESPONDENT WILL CLASSIFY AS HEALTH VULNERABLE. RECRUITER TO REFER TO CUSTOMER DATA TO SEE IF RESPONDENT IS ON PSR, THEN CONFIRM IN SCREENING.

Q7B: Thinking about your life and how you use digital channels such as email, websites, Apps, text messaging etc, which of the below would you say best describes you?

1. I prefer to use digital channels
2. I am able to use digital channels even if it is not my preference

3. I prefer not to use digital channels if an alternative is available
4. I don't use digital channels

NO QUOTA – RECORD FOR INFO ONLY

Q7C: Thinking about your attitude towards environmental issues, which of the below would you say best describes you?

1. I don't tend to think about my impact on the environment in my day-to-day life.
2. It's an added bonus if what I'm doing is environmentally friendly but it's not a big issue for me.
3. I think about my impact on the environment and try to do things to make a difference whenever I can (e.g., I make green choices but ideally this doesn't cost me more in money or effort)
4. I'm very concerned about my impact on the environment and make considerable effort to reduce it (e.g., I spend more time, effort and/or money in order to make green choices)

NO QUOTA – RECORD FOR INFO ONLY

Q8: As part of this research, the sessions will be audio and/or video recorded for analysis purposes. Everything you say will remain confidential. Are you happy to participate?

a) Yes, I am	
b) No, I am not	CLOSE

ALL MUST BE HAPPY WITH BEING AUDIO/VIDEO RECORDED

Thank you so much for answering my questions, you meet all the eligibility requirements so it would be great if you could take part.

The answers to the questions I've just been through with you will now be shared with BEAM Fieldwork who will share these with the Research Agency. BEAM Fieldwork will be in touch to confirm your place on the research via email, chat to you further about the research on the phone and [RECRUITER TO PICK]:

- a) *Confirm the date, time and location for your f2f event and give you some information about the pre-read*
- b) *Book in a suitable date and time for your Teams meeting with Blue Marble and give you some information about the pre-read*

We will be sending the pre-read information via email. Please let us know if you will struggle to receive the materials via email and we can arrange to have these posted to you.

Recruiter Declaration

I confirm that this recruitment screener has been carried out with the respondent named, and that it was done in accordance with the instructions of BEAM Fieldwork and the Code of Conduct of the Market Research Society.

Recruiter Name:

PROJECT SCREENER



Recruiter Signature:

Date:

PART ONE

**Thank you for agreeing to participate in this important project.
The research event will involve discussing future investment plans for Wessex Water**

- Please read the following information before coming to the research event. This is designed to give you some background information to the topics we will be discussing.
- This exercise should take no longer than 20 minutes
- There are 3 sections to read: this is Part One
- **Please don't worry if you don't understand or remember the information** – it will all be recapped during the research – and there will be time for questions.
- Please complete the short survey at the end of the document at least the day before the event.

Water companies in England and Wales

There are 11 water companies that provide **both water and sewerage services**

There are also 5 companies that provide **water services only**

Some households have 2 separate suppliers:

e.g. some people in Bristol receive **water services from Bristol Water** and **sewerage services from Wessex Water**

Water companies are regional: people have to receive water services from the company that covers where they live



This is the Wessex Water region

Wessex Water provides essential services across Somerset, Wiltshire, Dorset, Bath & Bristol.

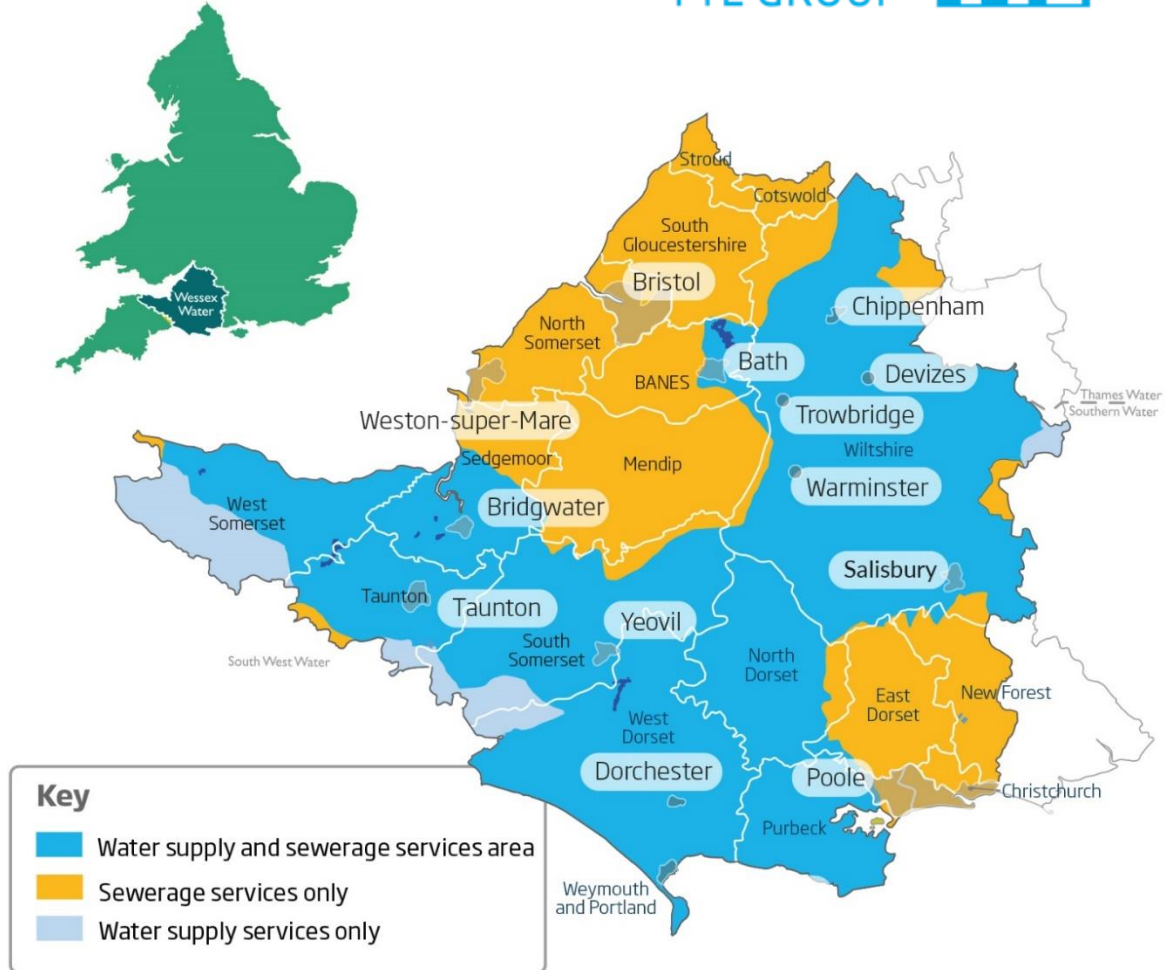
- It directly employs over 2,700 people

It provides sewerage services for the whole region:

- Approx. 2.9m people and 57,000 businesses

It provides water supply services for all areas excluding Bristol Water and Bournemouth Water areas:

- Approx. 1.4m people and 44,000 businesses



Every five years, **water companies develop a 'business plan'** that sets out how they want to develop their services, and the proposed cost to customers.

As customers are not able to choose their water company, water companies must give them a say about **what they want from their services and the price they pay.**

Talking to customers also helps water companies **prioritise what to do first or what to do most of** – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.





The business plan and prices are then **finalised by Ofwat** in a process known as the Price Review. There is more information about this here: 'All about the price review'.

Available at:

<https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are **'acceptable'** to you and whether you can **afford** the proposed bills from 2025-2030.

Companies also have to show to Ofwat that their **plans reflect what their customers want** – that means refining the plans based on what customers tell them.





1.
Water is collected
groundwater,
reservoirs or
rivers and treated



2.
Clean water
supplied to
customers



3.
Customers
receive a safe
supply of water



4.
Customers
flush waste
water



5.
Wastewater is
collected and
piped to sewage
pumping stations



6.
Wastewater
treated at
recycling centres
& returned to the
environment

7.
Customer services and
billing based locally



1.
Water is collected
groundwater,
reservoirs or
rivers and treated



2.
Clean water
supplied to
customers

Water quality
monitored by Drinking
Water Inspectorate



3.
Customers
receive a safe
supply of water

Satisfaction
monitored by Ofwat



4.
Customers
flush waste
water

Activities monitored
by Environment
Agency



5.
Wastewater is
collected and
piped to sewage
pumping stations



6.
Wastewater
treated at
recycling centres
& returned to the
environment

7.
Customer services and
billing based locally

Bills set by Ofwat



Water companies are currently part way through their five-year business plan for 2020 to 2025. They have **service level targets, called 'performance commitments'**, in every five-year business plan.

These **targets are based on what customers have previously told companies they would like them to do**, and on Ofwat's assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

We are now going to show you how well your water and/or sewerage company is doing on some of their performance commitments, compared to other water companies in England and Wales. These performance commitments are a snapshot of the wide range of services companies provide. We are showing these examples as customers have told us they are particularly important to them.

Water companies have to provide **reliable services**, and plan for their services to be **resilient** to changing weather patterns and demand from consumers.

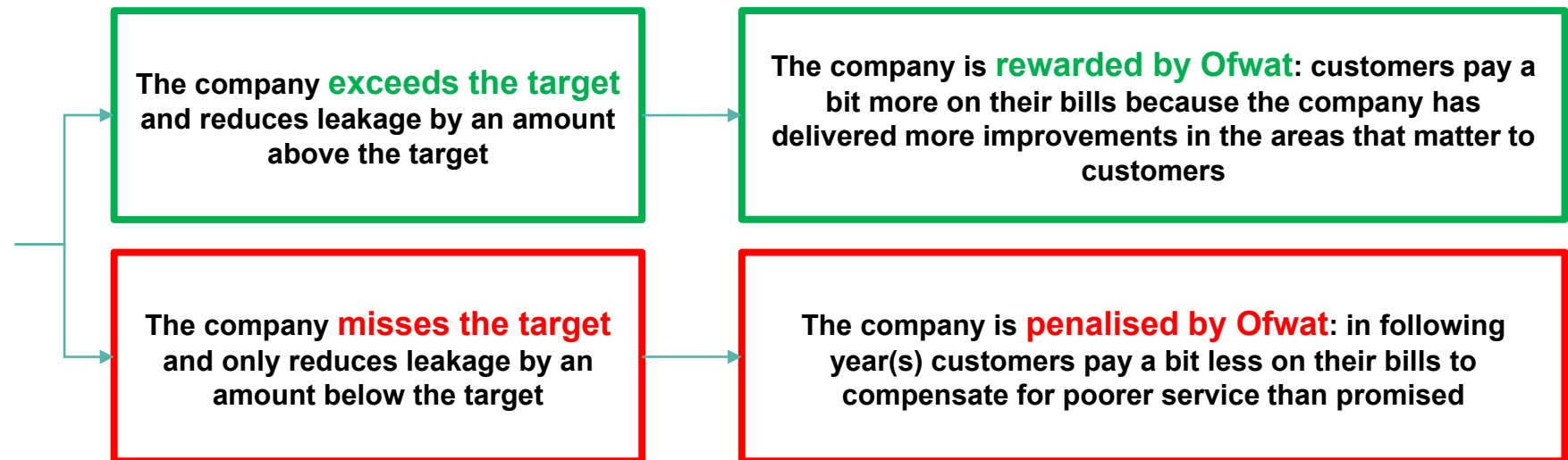
Companies can **miss** or **exceed** performance commitment targets for a number of reasons.

For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets

Example:

Water company sets a performance commitment based on customer priorities:

To reduce leakage from water mains and pipes





How has my bill been affected by Ofwat's penalties and incentives?

- Last year Wessex Water **passed 31** and **failed 11** performance commitment targets (with 2 neither passing or failing) earning them an overall reward of **£5.2m** that they could receive via customer bills (which would equate to £12 per household)
- However with bills already increasing it has deferred this reward so customer bills have not increased to pay for it.

PART TWO

Next we are showing you how Wessex Water performs in relation to other water companies across England and Wales

- The water industry uses a number of measures to assess performance. Because the water companies are very different in size and number of customers, these measures are often 'normalised' to give a fair comparison
 - E.g. on the next slide you'll see information about the number of minutes households are without water per property per year. This is an average: in reality, most houses don't experience problems but some will be without water for longer periods. But to be able to compare companies, the total interruption time is divided by all households in the region
- Please read the information and consider where you are happy with Wessex Water's performance – and where you would like to see improvements.

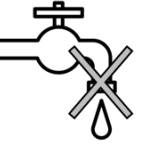
Water supply interruptions, without warning, for over 3 hours

If a water supply is interrupted without warning for over 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

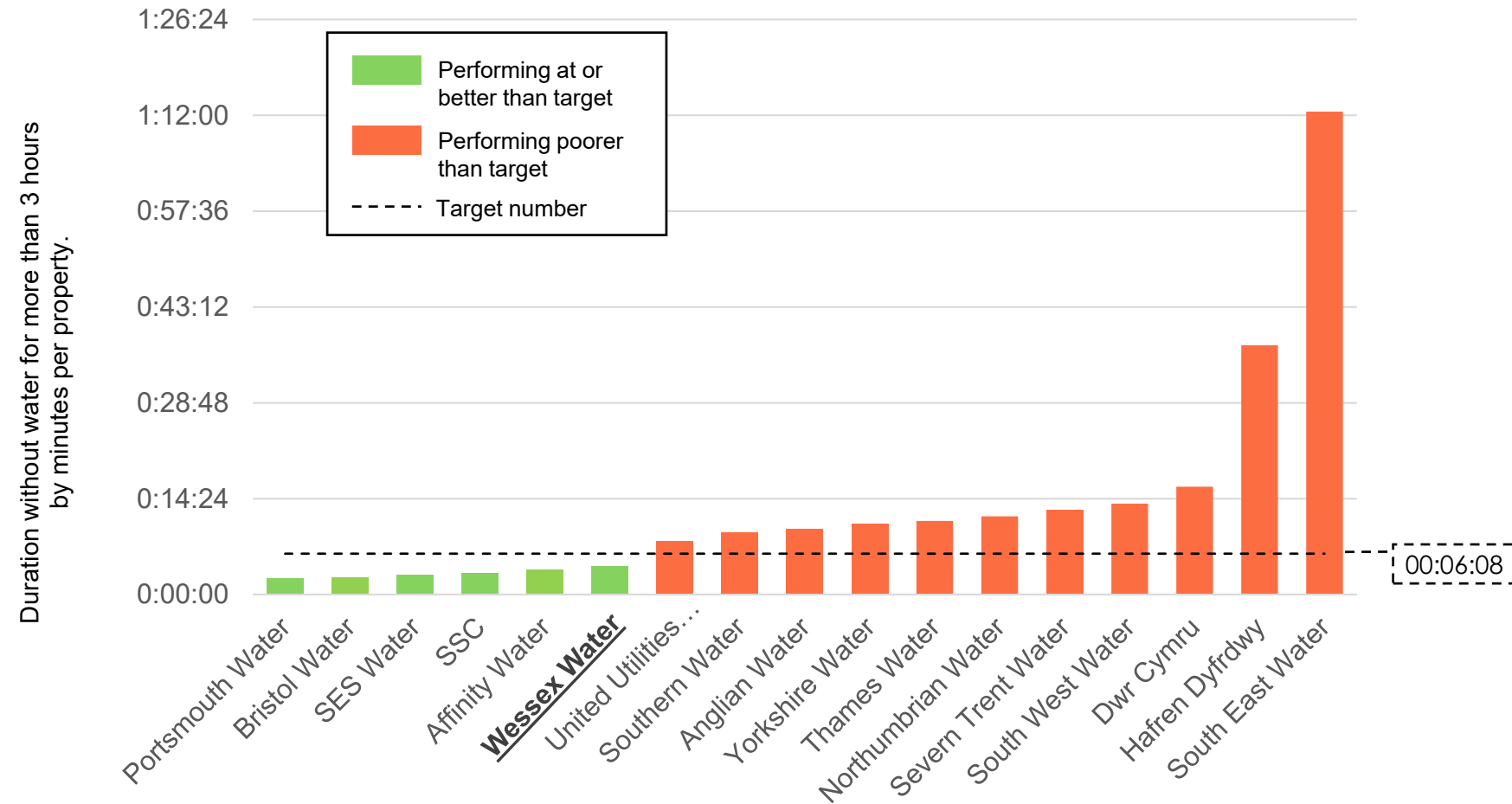
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-62%
Bristol Water	-59%
SES Water	-52%
SSC	-47%
Affinity Water	-39%
Wessex Water	-32%
United Utilities Water	+30%
Southern Water	+53%
Anglian Water	+60%
Yorkshire Water	+73%
Thames Water	+80%
Northumbrian Water	+92%
Severn Trent Water	+106%
South West Water	+123%
Dwr Cymru	+164%
Hafren Dyfrdwy	+511%
South East Water	+1083%

Water companies measured on the length of time properties are without water.



Duration without water for more than 3 hours
by minutes per property.
(A lower bar / number is better.)



The appearance, taste and smell of tap water

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.

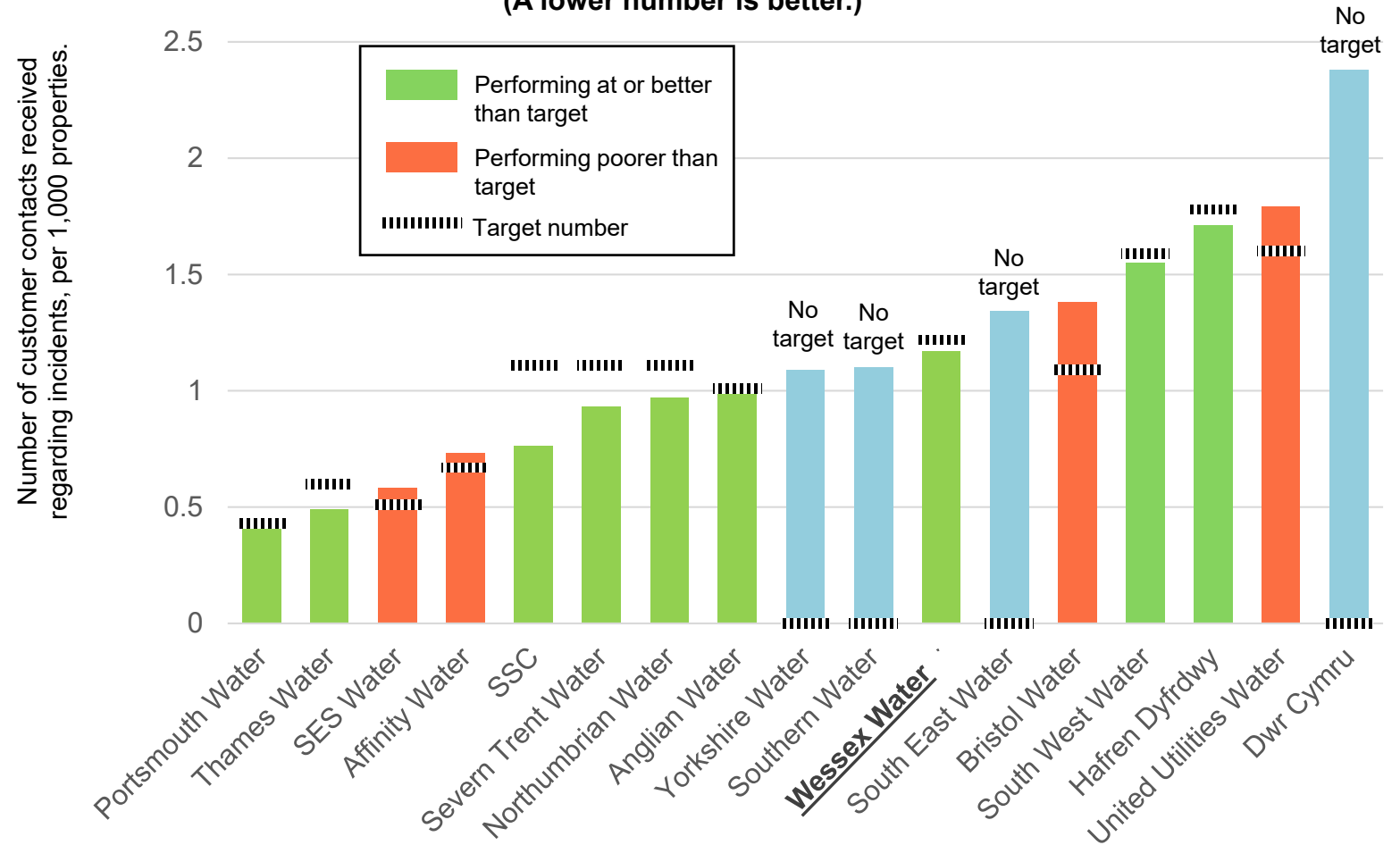
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-5%
Thames Water	-18%
SES Water	+14%
Affinity Water	+9%
SSC	-32%
Severn Trent Water	-16%
Northumbrian Water	-13%
Anglian Water	+2%
Yorkshire Water	No target
Southern Water	No target
Wessex Water	-4%
South East Water	No target
Bristol Water	+27%
South West Water	-3%
Hafren Dyfrdwy	-4%
United Utilities Water	+12%
Dwr Cymru	No target

Water companies measured on the number of customer contacts regarding the appearance, taste and smell of tap water.



Number of customer contacts received regarding incidents, per 1,000 properties.
(A lower number is better.)



Sewage flooding of properties

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.

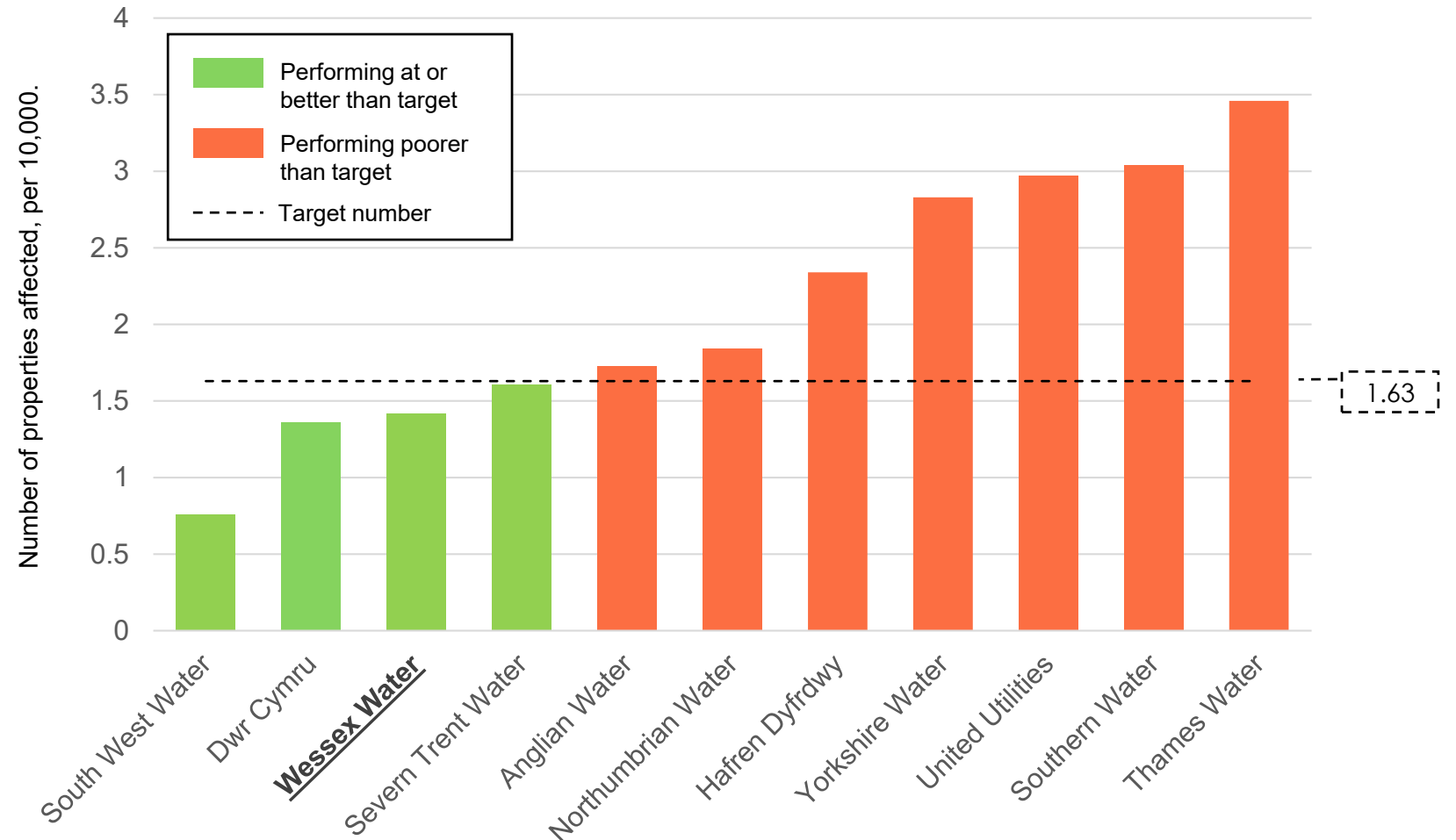
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
South West Water	-53%
Dwr Cymru	-17%
Wessex Water	-13%
Severn Trent Water	-1%
Anglian Water	+6%
Northumbrian Water	+13%
Hafren Dyfrdwy	+44%
Yorkshire Water	+74%
United Utilities Water	+82%
Southern Water	+87%
Thames Water	+112%

Water companies measured on the incidents of sewage flooding properties.



Number of properties affected, per 10,000.
(A lower number is better.)



Sewage flooding of gardens or outbuildings

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

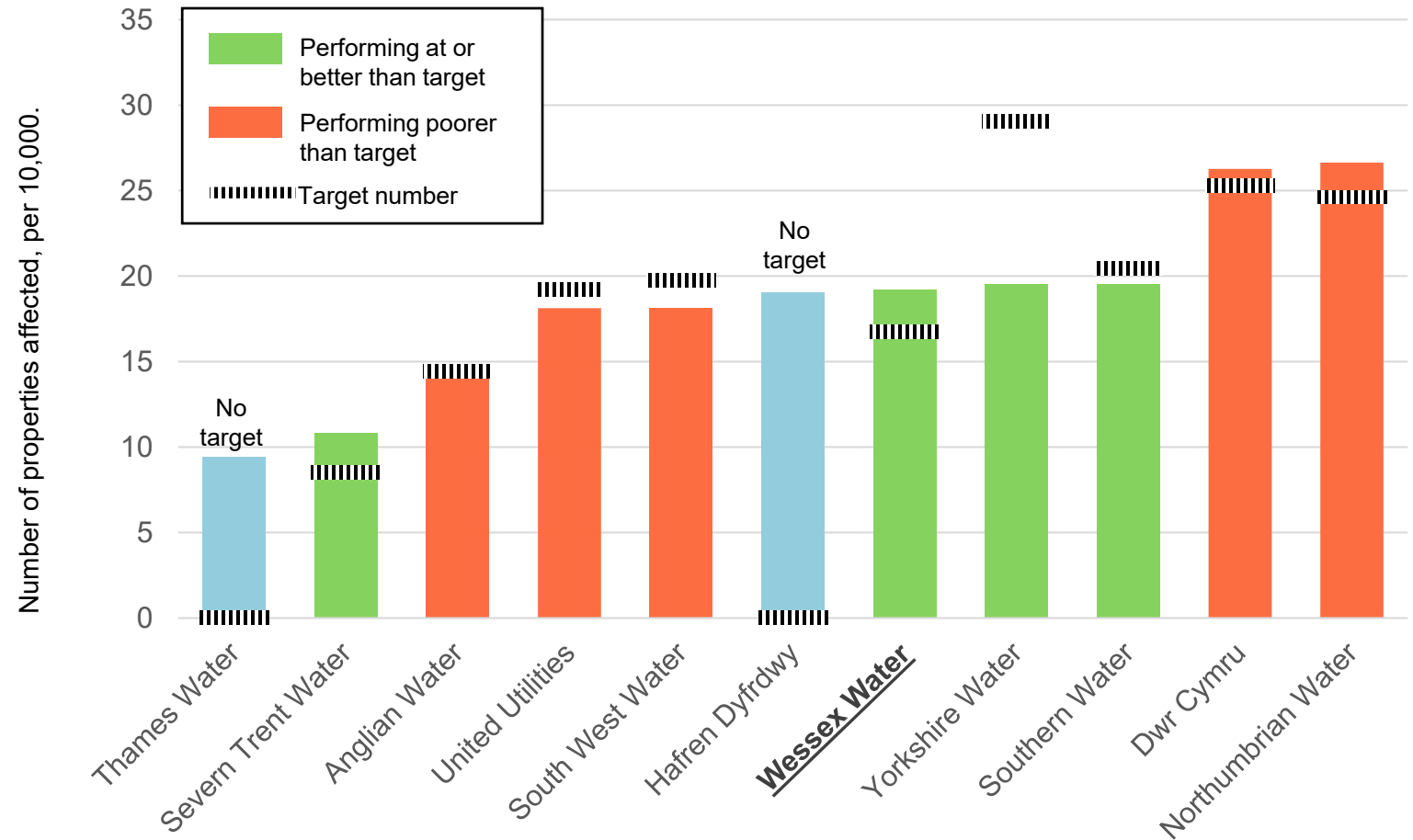
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Thames Water	No target
Severn Trent Water	+27%
Anglian Water	+1%
United Utilities Water	-6%
South West Water	-8%
Hafren Dyfrdwy	No target
Wessex Water	+15%
Yorkshire Water	-33%
Southern Water	-4%
Dwr Cymru	+4%
Northumbrian Water	+8%

Water companies measured on the incidents of sewage flooding gardens or outbuildings.



Number of properties affected, per 10,000.
(A lower number is better.)



Reducing leaks

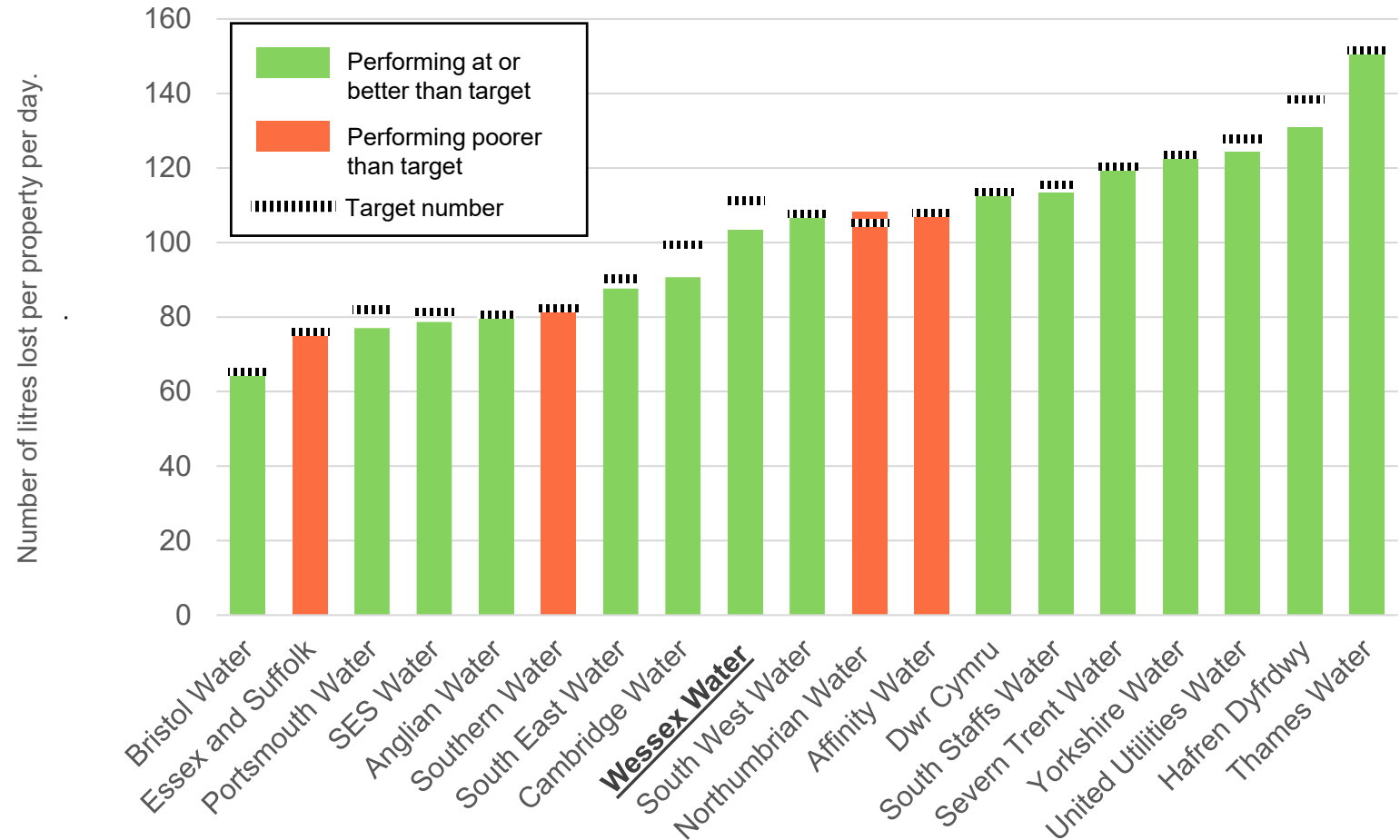
Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Bristol Water	-0.3%
Essex and Suffolk	+0.5%
Portsmouth Water	-6.0%
SES Water	-3.3%
Anglian Water	-0.5%
Southern Water	+1.1%
South East Water	-2.8%
Cambridge Water	-8.8%
Wessex Water	-7.1%
South West Water	0%
Northumbrian Water	+2.9%
Affinity Water	+0.6%
Dwr Cymru	-1.0%
South Staffs Water	-1.7%
Severn Trent Water	-0.6%
Yorkshire Water	-0.5%
United Utilities Water	-2.9%
Hafren Dyfrdwy	-5.3%
Thames Water	0%

Water companies measured on the amount of water lost due to leaks from water mains and pipes.

Number of litres lost per property per day.
(A lower number is better.)



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.

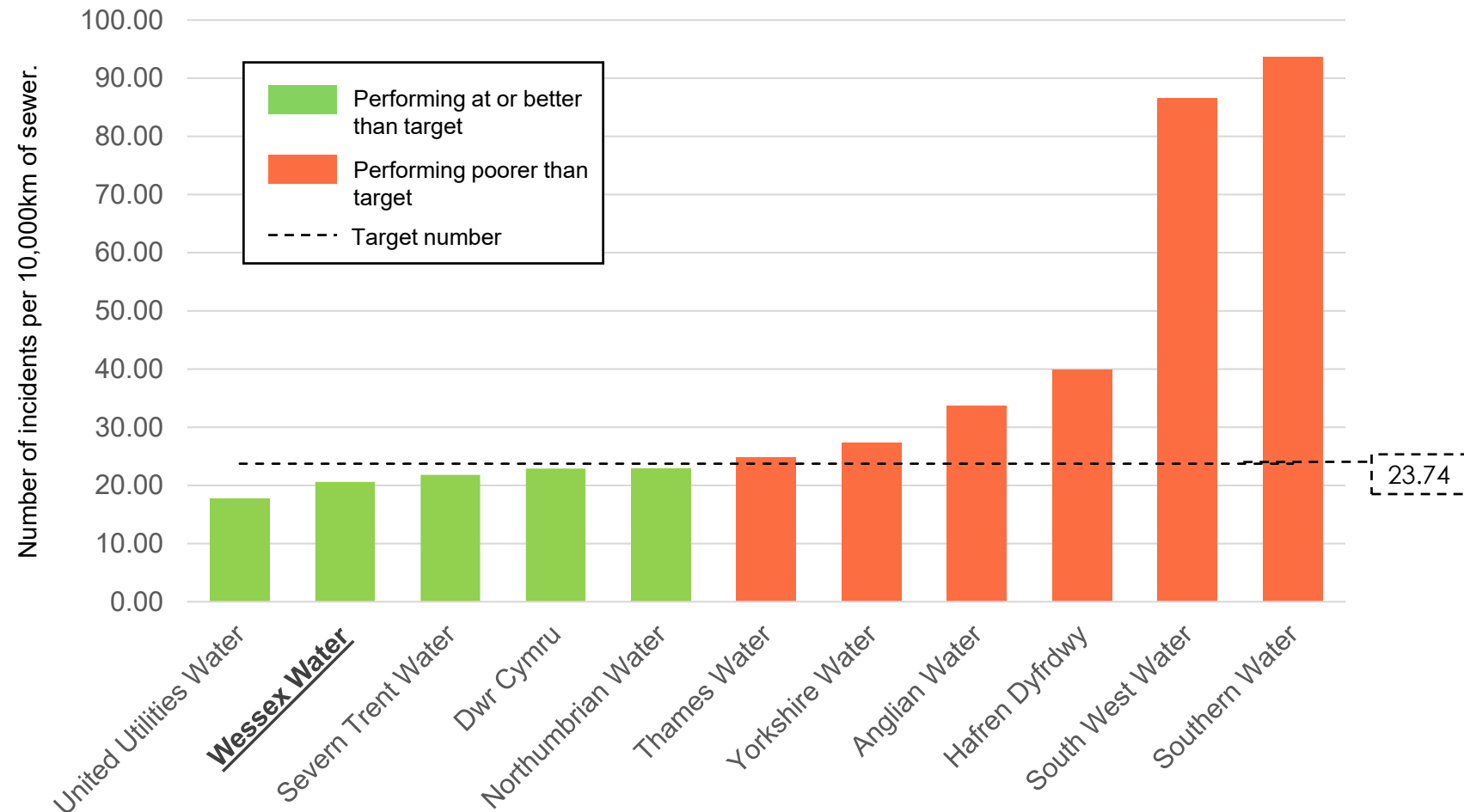
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
United Utilities Water	-25.3%
Wessex Water	-13.2%
Severn Trent Water	-8.1%
Dwr Cymru	-3.6%
Northumbrian Water	-3.2%
Thames Water	+4.7%
Yorkshire Water	+15.3%
Anglian Water	+42.2%
Hafren Dyfrdwy	-70.9%
South West Water	+264.7%
Southern Water	+294.4%

Water companies measured on the number of incidents of pollution of rivers and streams.

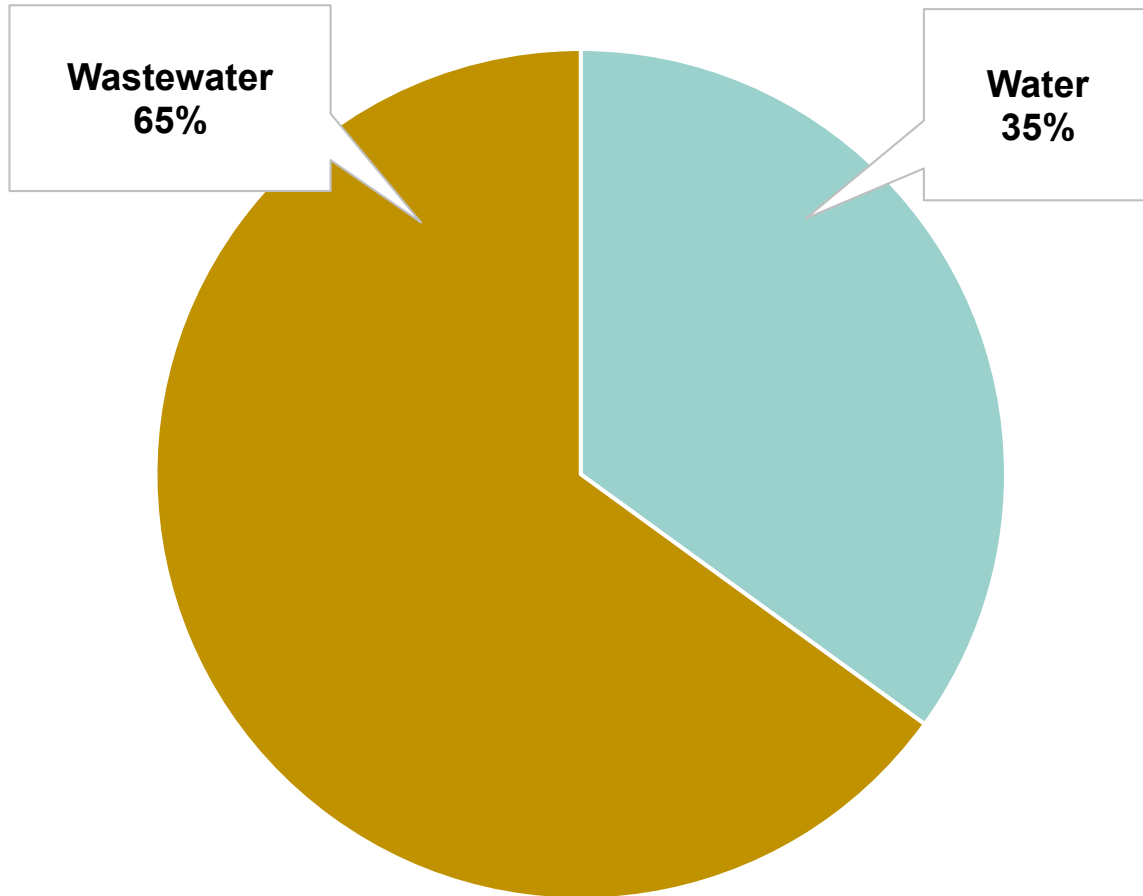


Number of incidents per 10,000km of sewer.
(A lower number is better.)

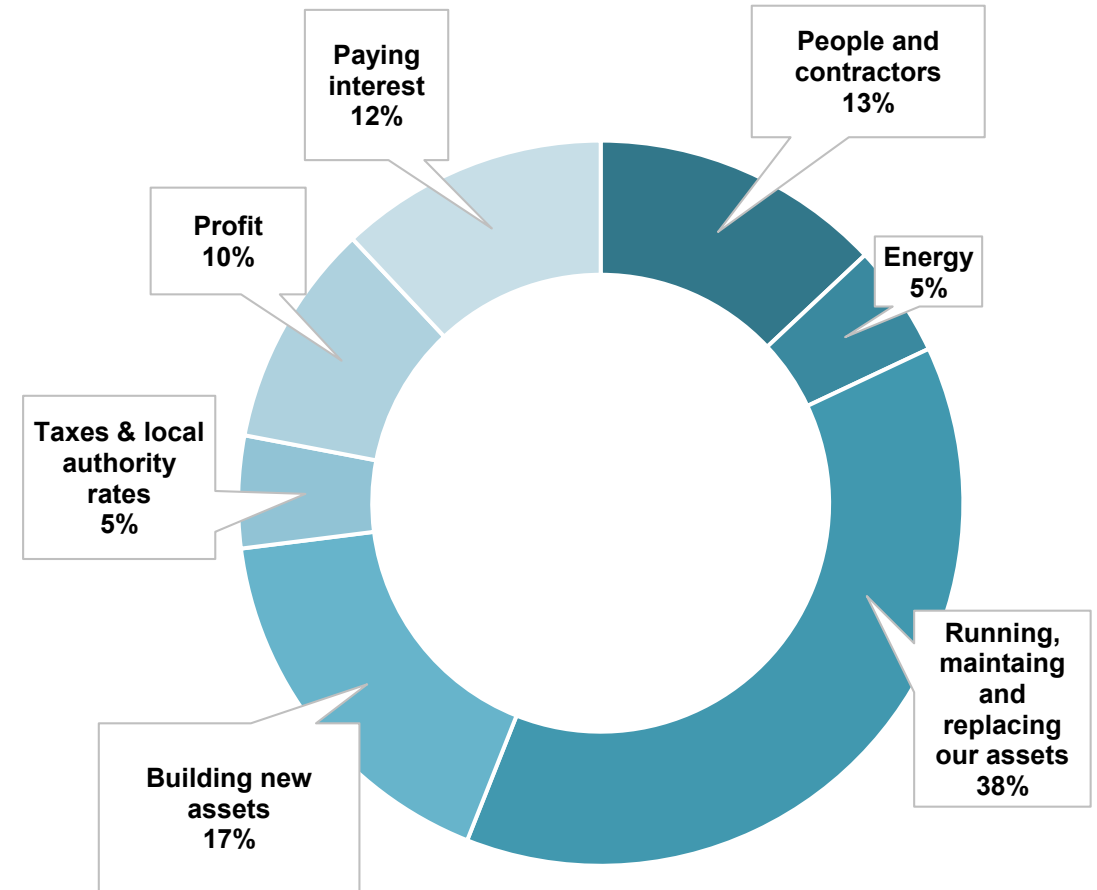


Household bill breakdown

Split for every £1 spent for an average customer



How the household bill breaks down



PART THREE

Finally we are showing you a headline summary of Wessex Water's proposed business plan for 2025-30.

- We will be discussing in more detail all the different elements of this plan when we meet you at the research event
- Once you've read it, please use the short (2 question) survey to note down your comments and questions
- Do remember that this research is about customers having their say on the plans before they are submitted to the regulator.

The following slide outlines Wessex Water proposed investment plan for 2025-30

There are 3 different types of investments in the plan:

Legally required investments

No say

All water companies are required to invest in new improvements **to comply with laws including new environmental legislation.**

Customers do not have a say in whether these investments go ahead.

Investments to meet 5 year performance targets

Customer feedback

All water companies are ***stipulated by regulators*** to set ambitious performance targets.

Customers do have some say in determining whether the targets are ambitious enough – or too ambitious – or too costly.

Longer term investments


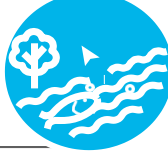



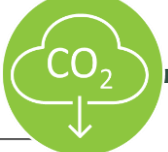
Customer input on how and when

All water companies can propose investments in addition to the minimum requirements **to help meet longer term goals.**

Customers have a large say and can give a view on what they think is the appropriate scale and pace of any additional investments.

2050 goals

Wessex Water's proposed plan for 2025-30

2050 goals		Wessex Water's proposed plan for 2025-30					
		Legally required No say	5 year targets: <i>customer feedback</i>		Longer term investments: <i>your input on how & when</i>		
Effective sewerage system	Halve the impact of sewer flooding on our customers		Reducing the number of sewage spills in 150 locations £23	Reducing internal and external sewer flooding	£11	Reduce sewage spills in further 45 locations	£11
Managing demand for water	Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences				Nutrient removal £47	Reducing leaks	£6
Great river & coastal water	<ul style="list-style-type: none"> To restore the quality of our rivers and coastal waters Zero pollution incidents 		£47			Reduce pollution incidents to 14 per 10k of sewer pipe	£4
Safe and reliable water	<ul style="list-style-type: none"> 100% compliance with drinking water standards, always Zero supply interruptions of more than 3 hours. 				£47	Keep supply interruptions at 5 mins per property	£0
Great customer experience	Be a top 10 customer service provider in the UK		£47			Reduce contacts re taste, smell, look	£2
Net zero carbon & biodiversity	Be a net zero carbon business By 2040				£47		

What will it mean for bills?

This proposed plan will have an impact on customers' bills.












The average bill will increase by **£26/month** by 2030.

This breaks down as:

- **£9** to meet the investment required by the regulators (*the blue and grey investments*)
- **£7** to meet the investments we propose over and above this (*the white investments*)
- **£10** to meet inflation

Wessex Water proposes an investment plan for 2025-30 to start to meet its long term goals.

The proposed commitments to improve on the key performance areas

			TODAY's performance	Target performance by 2030	What this will add to your bill
Supply interruptions		<i>Average time without water per household</i>	5 mins	 5 mins	£0
Water Quality		<i>Contacts per 1,000 population</i>	1.17 contacts	 1 contact	£2
Internal sewer flooding		<i>Incidents per 10,000 connections</i>	1.43 incidents	 1.04 incidents	} £11
External sewer flooding		<i>Incidents per 10,000 connections</i>	19.27 incidents	 14.5 incidents	
Leakage		<i>Number of litres lost per property per day</i>	103.29 litres	 93.02 litres	£6
Pollution		<i>Incidents per 10,000km of sewer</i>	20.6 incidents	 17.6 incidents	£4

THANK YOU FOR READING THIS INFORMATION.

PLEASE NOW ANSWER THE QUESTIONS IN THE LINK AND
SUBMIT THEM BEFORE COMING TO THE RESEARCH:

<https://forms.office.com/e/ffB7ZcAyv3>

This will only take around 5 minutes to complete.

(NB: if you require a paper copy please request one from BEAM)

Please have this document somewhere to hand during your research session

WE LOOK FORWARD TO CHATTING WITH YOU IN THE RESEARCH SESSIONS.



ACCEPTABILITY & AFFORDABILITY DELIBERATIVE EVENTS MODERATOR GUIDE

Overview

- 3 hour deliberative events each with household customers
- Customers to be arranged on tables of 8 customers with a Blue Marble moderator on each table
- Company/CCG representatives to attend – primarily in observation role
- Mix of whole room information sharing, individual table discussions and activities

17:45-18:00	15 mins	Registration, consent form signing, name badges etc
18.00	15 mins	Welcome & Introductions
18.15	10 mins	An introduction to the water company
18.25	10 mins	Recap on the pre-task information
18.35	20 mins	Focus on explaining the long-term picture to 2050 (incl temp check)
18.55	10 mins	Intro to proposed business plan
19.00	15 mins	Statutory (legally required) elements
19.15	15 mins	Performance commitments
19.30	10 mins	Break
19.40	45 mins	Discretionary elements (with phasing)
20.25	5 mins	Bill impacts
20.30	15 mins	'Must do' business plan
20:45-21:00	15 mins	Wrap-up, post task & thank you

Welcome & Introductions plus brief response to pre-read (15 mins/6-6.15)

Aim: welcome everyone to the session, introduce Blue Marble and observers and set out expectations of the event

BM Lead Moderator:

- Welcome everyone to the event.
- Introduce Blue Marble and explain that we are an independent research agency.
- Introduce Blue Marble staff and explain that we'll be facilitating the discussions.
- Explain: Confidentiality, GDPR, recording, how data will be used.
- Run through housekeeping & timings – toilets, fire exits, break for refreshments etc.
- Objective for the session: to help Wessex Water make important investment decisions.
- Role of respondents:
 - Asking people to act as representatives of the population of the Wessex Water region;
 - There are no right or wrong answers we just want to hear people's open and honest views;
 - We will provide lots of information and expect much of it will be new to them – encourage people to ask questions.



- Acknowledge that we have a wide range of different people in the room with different backgrounds and perspectives and the aim is to hear everyone's views and see if we can come to a consensus (or not).

Water companies provide a service for everybody, as we all consume water. We need to consider the merits of the plans we'll be reviewing tonight/today through different lenses:

- **As a customer** – think about the plans as someone who is a bill-payer
- **As a consumer** – think about the plans as someone who is using these services (e.g. children and young people, some tenants)
- **As a citizen** – think about the plans bearing in mind the wider need of society and the environment over the longer term.

Observers/Wessex Water representatives (CCG): each to briefly introduce self – name, job title and 1 sentence summary of role/responsibilities.

BM Lead Moderator: *Now we're going to ask you to introduce yourselves to the people on your table – and to make it a bit more fun we'd like you to look at these pictures and think about which most closely reflects life for you at the moment. (SLIDE 7)*

Table discussions (10 mins)

Introductions

We provided you with some pre-read information to look through before attending this session. We're going to cover those topics in depth in due course, but I want to get your first thoughts as part of our introductions:

Each respondent to introduce self:

- Name, who lives in household, which image most closely fits their life at the moment and why – and also tell the table what struck you or surprised you most out of the things you have read?

Finish section with a table discussion:

- Has any of the information you have seen changed your opinion of your water company in any way?
- What would you most like to find out more about?
- Is there anything in the material you read which was difficult to understand?
 - Which bits?

An introduction to the water company (10 mins/6.15-6.25)

BM Lead Moderator: (3 mins) to very briefly recap pre-task SLIDES 9-14

SLIDE 9: *This first slide shows us all the water companies that operate across England and Wales. It is important to note that water companies operate regionally. We don't choose our water provider – we have to use the company that covers the area we live in. This is in part why this research is important – it is a chance for customers to have their say. Some companies provide just water supplies, others provide both water and sewerage services.*

SLIDE 10: *This is a close up of the Wessex Water region – and it gives us a sense of the scale of the operation. Wessex is one of the companies that provides both sewerage and water*



supply. It provides sewerage services to the whole of the region, that's about 3m people. The yellow areas are where another company supplies the water. Wessex supplies the water to around 1.4 million people - shown in blue. Wessex Water employs 2,700 people who deliver these services.

SLIDE 11: This slide explains why the research is happening. It is all to do with the way water companies plan ahead in a process called the Price Review.

Every five years, water companies develop a 'business plan' that sets out how they want to develop their services, and the proposed cost to customers. As we've seen, customers are not able to choose their water provider, so water companies must give them a say about what they want from their services and the price they pay. Talking to customers through research also helps water companies prioritise what to do first or what to do most of. In this session we'll be looking at some of the choices they face – and where they want your input.

SLIDE 12: Water companies are regulated. This research is part of the regulatory process. The business plan we'll be looking at - and the cost of the investments which impact on customer bills - are **finalised by Ofwat**. One of the ways that people have their say is through research like this. We'll be asking what you think about the plans: are they '**acceptable**' to you and are they **affordable**. The plans we show you will be refined following this research based on what customers have to say.

SLIDE 13: Here we see all the things a water company like Wessex Water does. We are showing you this because the plans relate to all of the aspects of their work.

SLIDE 14: All of these aspects are overseen by regulators. We have mentioned Ofwat already who oversee the financial operation of water companies and measure customer satisfaction. The Environment Agency monitors all the areas that could have a detrimental impact on the environment if not conducted properly.

The Drinking Water Inspectorate monitors water quality.

Hand back to table moderators

Table discussions: (7 mins)

- Awareness and experience of the water company
 - How much of this is new information for you?
 - What contact do you have with your water company?
 - What associations do you have with your water company?
 - Do you have any particular perceptions of them?
- Understanding the role of water companies
 - Were there any surprises in terms of what they do as a business?
 - Were you aware that Wessex Water provides both your water services and your sewerage services?
 - Are your bills for both services separate or combined?
- Participants' sentiment towards their water company
 - What kind of relationship do you have with your water company?
 - If your water company was a person, what would they be like: describe personality, how would they dress, what would they drive, where would they go on holiday, how would they spend their free time?



Recap on the pre-task information (10 mins/6.25-6.35)

BM Lead Moderator: (3 mins) to very briefly recap pre-task slides (how monitored); (penalties/incentives); the performance slides; what a bill pays for

SLIDE 16: The next information we showed you was about the way water companies are monitored, specifically by Ofwat.

We are told about the service level targets, called 'performance commitments', which are set for every five-year business plan. Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

SLIDE 17: Companies can miss or exceed performance commitment targets and this has a direct impact on customer bills because of the way Ofwat rewards or penalises companies

SLIDE 18 Last year Wessex Water passed 31 and failed 11 performance commitment targets earning them an overall reward of £5.2m. The way the reward is paid is via customer bills (and last year this equated to £12 per household that Wessex Water could add to bills because it performed better than the required level). However with bills already increasing it has deferred this reward so customer bills have not increased to pay for it. Hopefully now you have a sense of how the water market works, that it is regulated – and that its performance is closely monitored by the various regulators.

SLIDE 19: The remaining information showed us the performance of Wessex Water against all the other water companies. We'll look at all these slides again when we consider their future plans.

- **SLIDE 20:** In terms of supply interruptions, Wessex Water performed better than the target set by 32%
- **SLIDE 21:** In terms of water quality, its appearance, taste and smell, Wessex water is more or less on target
- **SLIDE 22:** For the target about sewage flooding in properties, Wessex Water is exceeding its target
- **SLIDE 23:** For sewage flooding outside the home in gardens or outbuildings, it is not meeting its target
- **SLIDE 24:** For reducing leaks, it has exceeded its target
- **SLIDE 25:** And in terms of pollution of rivers and bathing areas, it is exceeding its target

SLIDE 26: Finally, this slide shows us what your bill pays for.



Table discussions: (7 mins)

- Thinking about what was just presented, which areas matter most to you?
 - Why?
 - Are there any areas that don't really matter to you at all?
- Where do you think investment and improvement is most needed?
 - Should this area be prioritised? If so, why?
- Thinking about all the water and wastewater services that Wessex Water provide for you and thinking about your bills:
 - What do you think of the value for money of the service you receive?
 - In what ways are they providing good value?
 - In what ways are they providing poor value?

Focus on the long-term picture to 2050 (20 mins/6.35-6.55)

BM Lead Moderator: (5 mins)

Before we get into the detail of the investment plans for the next 5 years, we need to understand what Wessex Water is trying to achieve in the long term. The next slides are to give you a bit more context for this research.

SLIDE 28: Here is a dateline showing the way that water companies plan out as far as 2050 as well as a shorter term 5 year plan as the first stepping stone. We will be discussing both the shorter 5 year plans and the long term goals.

SLIDE 29: There are some challenges that all water companies have to factor in to their longer term plan:

- *The impact of a changing climate: more extreme weather predictions mean that water companies will need to manage more frequent drought periods and the risk of more intense rain and flooding. Their plans include ways to adapt to climate change and become a net zero business.*
- *The pressures that come with a growing population: this means increasing the water and wastewater networks to accommodate new housing developments and building new sustainable ways to capture storm water to prevent it overwhelming the drains and sewers – especially necessary in built up areas.*
- *Some new laws and regulations: all water companies have to comply with environmental laws in England. They also have to consider how climate change and population growth affect current and future capacity of sewage and rainwater drainage networks. These cover a range of areas including:*
 - *Reducing pollution of seas and rivers from sewage overflows.*
 - *Not taking too much water from rivers and from underground to protect the ecology.*
 - *Making sure there is enough water available to protect the natural environment as well as providing a public water supply.*
 - *Treating water and wastewater to a standard that does not harm the natural environment.*



BLUE MARBLE

- *Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.*
- *And then there's the economic situation – the cost of living crisis and high inflation.*

Table discussions: (5 mins)

SLIDE 30: We asked you to reflect on the squeeze facing some households in the pre-task survey....

- Do you feel that things are worsening/improving/remaining stable?
 - If not improving, when do you anticipate the financial situation will start to improve?
- How are you feeling about the financial situation looking into the future:
 - In the next 5 years?
 - In the next 10 years?

BM Lead Moderator: (5 min)

Now we'd like to get your feedback on Wessex Water's long term ambitions.

SLIDE 31: Wessex Water has 8 outcomes which are its ambitions or goals for 2050. We'd like you to discuss these on your tables now:

Table discussions: (5 mins)

- What do you think about the long-term plans Wessex Water have set out?
- Which one or two outcomes matter most to you – probe why
- Which matter least? Why?
- These ambitions sit in the 2050 timeframe (or 2040 in the case of net zero) but which would you like to see achieved sooner than 2050? Probe why.
- Which do you think are most urgent to achieve?
- Which are least urgent? Why?

Introduce shorter-term (proposed business plan) – 75 mins/6.55 – 8.20 (incl break)

BM Lead Moderator (5 mins)

SLIDE 32 *There are 2 plans that we will be showing you. You have already seen the 'Proposed' plan in the pre-read document. This plan includes extra work over and above what they are required by law to provide extra benefits to customers, the environment and local communities. We will also be showing you a second plan which we are calling the 'must do' plan. It allows Wessex Water to just carry out the work that they are required to do by law – and would have the lowest impact on customer bills.*

SLIDE 34 *This is the one page plan you saw in the pre-read. I'm just going to clarify the 3 types of investment for you to consider...* **SLIDE 35** *These are:*

- The elements that are legally required of all water companies. We'll briefly tell you about these as they will impact bills – but there isn't and say in these investments
- Then we'll consider the performance commitments that we've been looking at already. We'll be asking you if you are happy with the targets that they are proposing for the next 5 years



- And finally the additional investments that will help them meet their long term goals for 2050. Here you will be shown some options to choose from depending on how you think they should balance this spend over the next 25 years

We'll have the summary on the table so that you can refer to the overall plan as we work through the elements.

SLIDE 36 We'll start by showing you the legally required investments:

Table discussions part 1 (15 mins)

Moderator refer to **SLIDE 37**: the first investment relates to making the sewer system more effective and supports the long term target to reduce the number of sewer flooding incidents by half. We are given some background information here about why the investment is needed – and that it will increase bills by £23 per year between 2025-30.

- How do you feel about the mandatory target set for **Reducing the number of sewage spills**?
 - Do they feel too ambitious/not ambitious enough/about right?
- What are your initial thoughts on the proposed **£23** bill changes?
 - Does this seem reasonable?
 - Is it affordable?
- Do you feel this will support the longer term ambition /2050 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Moderator refer to **SLIDE 38**: this is the other mandatory investment we are shown today.

- How do you feel about the mandatory target set for **Nutrient removal and river water quality monitoring**?
 - Does it feel too ambitious/not ambitious enough/about right?
- What are your initial thoughts on the proposed **£62** bill changes?
 - Does this seem reasonable?
 - Is it affordable?
- Do you feel this will support the longer term ambition /2050 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Table discussions part 2 (15 mins)

SLIDE 40 Moderator: now we are moving on to briefly look at the 6 key performance targets and the investments proposed.

SLIDE 41 Six Performance commitments slide on big screen

MODERATOR refer to the additional detail slides (end of the presentation) as required, using information to answer any questions.

How do you feel about the targets set? Bear in mind the current performance level (refer to pre-read graphs as necessary)

- Have you got any questions or comments on any of the targets?
- Do any seem too ambitious?
- Do any seem not ambitious enough?
- What are your initial thoughts on the proposed bill changes?
- Do you feel this will support the longer term ambition /2050 target?
 - Generally, do you want to challenge any of these targets?
 - If challenge: what would you like to see changed?



BREAK (10 minutes)

Table discussions part 3 (45 mins in total)

BM Lead Moderator (2 mins)

SLIDE 42 now we are moving onto look at the 6 longer term investments where customers have a say in how and when these investments are planned between now and 2050

SLIDE 43: one aspect we will be discussing when looking at the long term investments is how they phase spending – we particularly want your input here because this will have direct consequences for customer bills.

MODERATOR to talk over the 3 examples: The way companies implement their long term investments will have an impact on who pays. Each scenario equates to the same overall bill amount – the difference is when the investment happens – and who ultimately pays.

- The first scenario is for steady rises which will affect current and future customers similarly.
- In the second scenario, bills would rise more sharply now so that everyone benefits as soon as possible from the improvements. This will mean increasing bills for today's customers (even though they may not benefit from the investments).
- In the third scenario, bills would be kept down as the company would delay investing. They will still meet the long term goals but it means the benefit of the investments come later - and future customers will make the biggest contribution through bills.

Table discussions: (5 mins)

- What is best for them as individuals?
- What is fairest – considering current and future customers?
- What is best for society (citizen mindset)

BM Lead Moderator (2 mins)

First I'll read out some background about an additional investment replacing lead pipes

- Properties built before the mid 1970's may have a lead service pipe. Lead was banned as plumbing material in the 70's. The World Health Organisation state there is no safe level for lead in drinking water
- In areas where there are lots of properties with lead service pipes, water companies dose the water with phosphate to reduce lead being picked up in the drinking water Wessex Water have a programme of lead pipe replacement to improve water quality.
- It encourages anybody with lead pipes in their home to get them replaced. Between 2020-25 Wessex replaced 9,000 lead pipes. It proposes to continue with further lead pipe replacement and also offer a grant to customers if it can't replace the lead pipes for any reason
- Anybody who has a concern about lead can ask for a water quality sample to be taken

SLIDE 44 Show target summary (big screen)



SLIDE 45 Phasing **lead pipe** investment: this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach (spend less now) or they could accelerate investment (spending more now).

Table discussions (5 mins)

- How do you feel about the proposed target (which is discretionary) set for **lead pipe replacement**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
 - Which do you think is the fairest for
 - Customers – bill payers
 - Future customers
 - Society and the environment?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?

BM Lead Moderator (2 mins)

Now I'll read out some background about an additional investment for smart meters

The Wessex Water area has been designated as an area of 'water stress' – meaning it can compulsorily meter all properties. Like leakage, reducing the amount of water customers use in their home (or business) will reduce the amount of water taken from the environment.

Today, just over 70% of households have a basic water meter used to generate the water bill every 6 months – none have smart meters.

Smart meters read usage several times a day and can be used to spot leaks around or within the home (e.g. leaking toilets and taps) more quickly than a basic meter could which means they can be fixed quicker too and reduce water wastage.

Through more regular billing and/or via an app, customers can have more control over their bill by finding ways to change their water using habits

SLIDE 46 Show target summary (big screen)

SLIDE 47 Phasing **smart meter** investment: this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach (spend less now) or they could accelerate investment (spending more now).

Table discussions (5 mins)

- How do you feel about the proposed target (which is discretionary) set for **smart meters**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
 - Which do you think is the fairest for
 - Customers – bill payers
 - Future customers
 - Society and the environment?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?



BM Lead Moderator (2 mins)

Now I'll read out some background about an additional investment for making operations net zero

Wessex Water uses carbon to run its sites, fuel to run vehicles and chemicals to treat water. It also emits greenhouse gases when it treats sewage. It can reduce emissions through generating greener electricity on site and reducing energy and chemical use. It is also moving towards greener treatment processes, where possible

SLIDE 48 Show target summary (big screen)

SLIDE 49 Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach or they could accelerate investment.

Table discussions (5 mins)

- How do you feel about the proposed target set for **making operations net zero**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
 - Which do you think is the fairest for
 - Customers – bill payers
 - Future customers
 - Society and the environment?
- Do you feel this will support the longer term ambition **/2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

BM Lead Moderator (2 mins)

Now I'll read out some background about an additional investment relating again to carbon reduction and biodiversity

Sewage sludge is disposed of as fertiliser but it creates carbon emissions when spread on land and potentially leaches micropollutants into the water environment.

Wessex Water needs to reduce these emissions. Furthermore they may not be allowed to spread sludge to land in the future.

This will have a big impact as they will need to dispose of the sewage sludge in another way.

SLIDE 50 Show target summary (big screen)

SLIDE 51 Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach or they could look at an alternative investment.



Table discussions (5 mins)

- How do you feel about the proposed target set for **improving the treatment of sewage sludge to remove micropollutants from being spread to land**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
 - Which do you think is the fairest for
 - Customers – bill payers
 - Future customers
 - Society and the environment?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

BM Lead Moderator (2 mins)

Now I'll read out some background about an additional investment further reducing the number of sewage spills?

- NB Moderator refer to plan on a page and the mandatory investment so that respondents understand this is in addition to what was discussed earlier

SLIDE 52 Show target summary (big screen)

*SLIDE 53 Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach or they could accelerate investment.*

Table discussions (5 mins)

- How do you feel about the proposed target set for **further reducing the number of sewage spills**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
 - Which do you think is the fairest for
 - Customers – bill payers
 - Future customers
 - Society and the environment?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

BM Lead Moderator (2 mins)

Now I'll read out some background about an additional investment for Removing everyone from water poverty?



To date Wessex Water has helped more than 55,000 households afford their ongoing water bills or repay their debt through a variety of low-rate tariffs and payment schemes
There are likely to be many more households in the Wessex Water region who need help in the future to eradicate water poverty

SLIDE 54 Show target summary (big screen)

SLIDE 55 Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach or they could accelerate investment.

Table discussions (5 mins)

- How do you feel about the proposed target set for **Removing everyone from water poverty**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
 - Which do you think is the fairest for
 - Customers – bill payers
 - Future customers
 - Society and the environment?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

SLIDE 56 (STIMULUS Proposed plan cost) moderator to explain the slide (5 mins)

Table discussions

- Response to the summary of bill impacts over the 2025-30 period
- How affordable is it?
- How are you feeling about the plan?
- How are you feeling about Wessex Water?

Focus on the shorter-term (MUST-DO business plan) – 15 minutes/20.30

BM Lead Moderator (5 mins)

SLIDE 58 & 59 Introduce overview and summary of the 'must-do' business plan

- Talk through the 5 areas that will revise the bill changes down (**STIMULUS least cost alternative**)
- **SLIDE 60 proposed bill change** based on the average household bill (explaining that they will see a personal bill prediction later on for them to respond to)



Table discussions

- How do you feel about the 'least cost/must do' plan
- Which of the 5 areas are you least willing to compromise
- Which are you most willing to forego?
- How does this plan implicate the following groups (i.e. what might be the disadvantages or advantages of the least cost from the different perspectives)?
 - Customers – bill payers
 - Future customers
 - Consumers – who are affected but don't pay directly.
 - Society and the environment?

Wrap up and post-task – 15 minutes/20.45

BM Lead Moderator

Thank you very much for all of your input so far. We really appreciate your time and engagement.

To round things up, we'd like you to complete a short questionnaire about some of the things we have discussed today.

DELIBERATIVE EVENT





You!

A cross section of Wessex Water customers and/or residents living in the region



BLUE MARBLE

[INSERT BM NAMES]

Here to help Wessex Water make important investment decisions

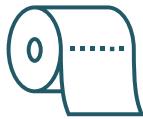
Everything you say during the interview will be treated anonymously

Blue Marble will not reveal to anyone what individual participants have said

In reports we will only summarise what we hear through the whole session (and also other sessions), drawing out general differences between groups of customers

We will voice record the session – we will not be sharing the recordings with anyone outside of our project team and we will delete the recording once we have taken notes

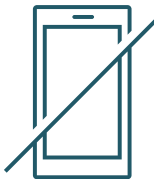




Toilets



Fire exit / alarms



Please if you can turn your phones off or on silent



- You are representatives of the population of the Wessex Water region
- No right or wrong answers: we want to hear your open and honest views
- We have a wide range of different people in the room with different backgrounds and perspectives and the aim is to hear everyone's views and see if we can come to a consensus (or not)
- We will provide lots of information: please ask questions!
- It's absolutely fine to disagree with other people - but please respect other people's views





Table introductions

Which image reflects life for you?



An introduction to water and wastewater services

There are 11 water companies that provide **both water and sewerage services**

There are also 5 companies that provide **water services only**

Some households have 2 separate suppliers:

e.g. some people in Bristol receive **water services from Bristol Water** and **sewerage services from Wessex Water**

Water companies are regional: people have to receive water services from the company that covers where they live



Wessex Water provides essential water services across Somerset, Wiltshire, Dorset, Bath & Bristol.

- It directly employs over 2,700 people

It provides sewerage services for the whole region:

- Approx. 2.9m people and 57,000 businesses

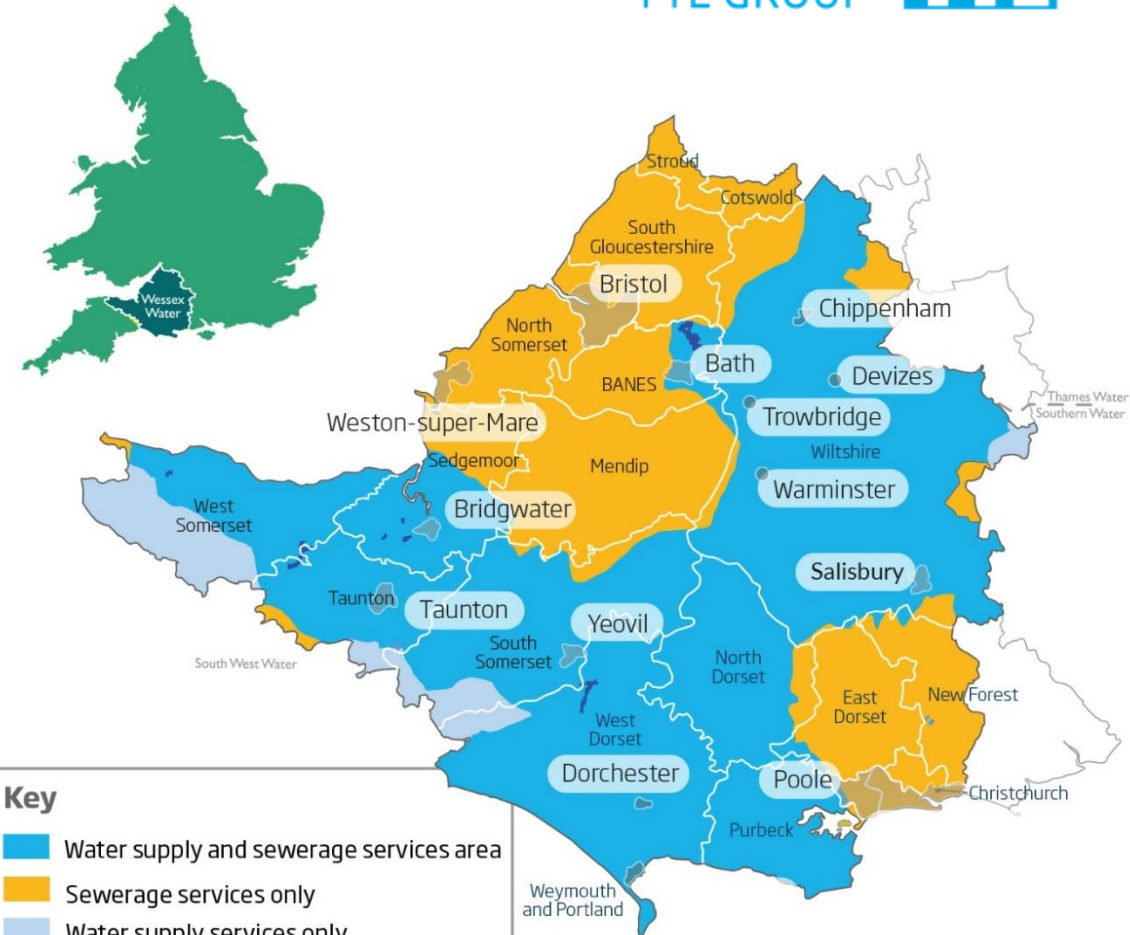
It provides water supply services for all areas excluding Bristol Water and Bournemouth Water areas:

- Approx. 1.4m people and 44,000 businesses

FOR YOU. FOR LIFE.

Wessex Water

YTL GROUP



Every five years, **water companies develop a 'business plan'** that sets out how they want to develop their services, and the proposed cost to customers.

As customers are not able to choose their water company, water companies must give them a say about **what they want from their services and the price they pay.**

Talking to customers also helps water companies **prioritise what to do first or what to do most of** – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.





The business plan and prices are then **finalised by Ofwat** in a process known as the Price Review. There is more information about this here: 'All about the price review'.

Available at:

<https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are **'acceptable'** to you and whether you can **afford** the proposed bills from 2025-2030.

Companies also have to show to Ofwat that their **plans reflect what their customers want** – that means refining the plans based on what customers tell them.





Water services



Wastewater services



1.

Water is collected from groundwater, reservoirs or rivers and treated



2.

Clean water supplied to customers



3.

Customers receive a safe supply of water



4.

Customers flush waste water



5.

Wastewater is collected and piped to sewage pumping stations

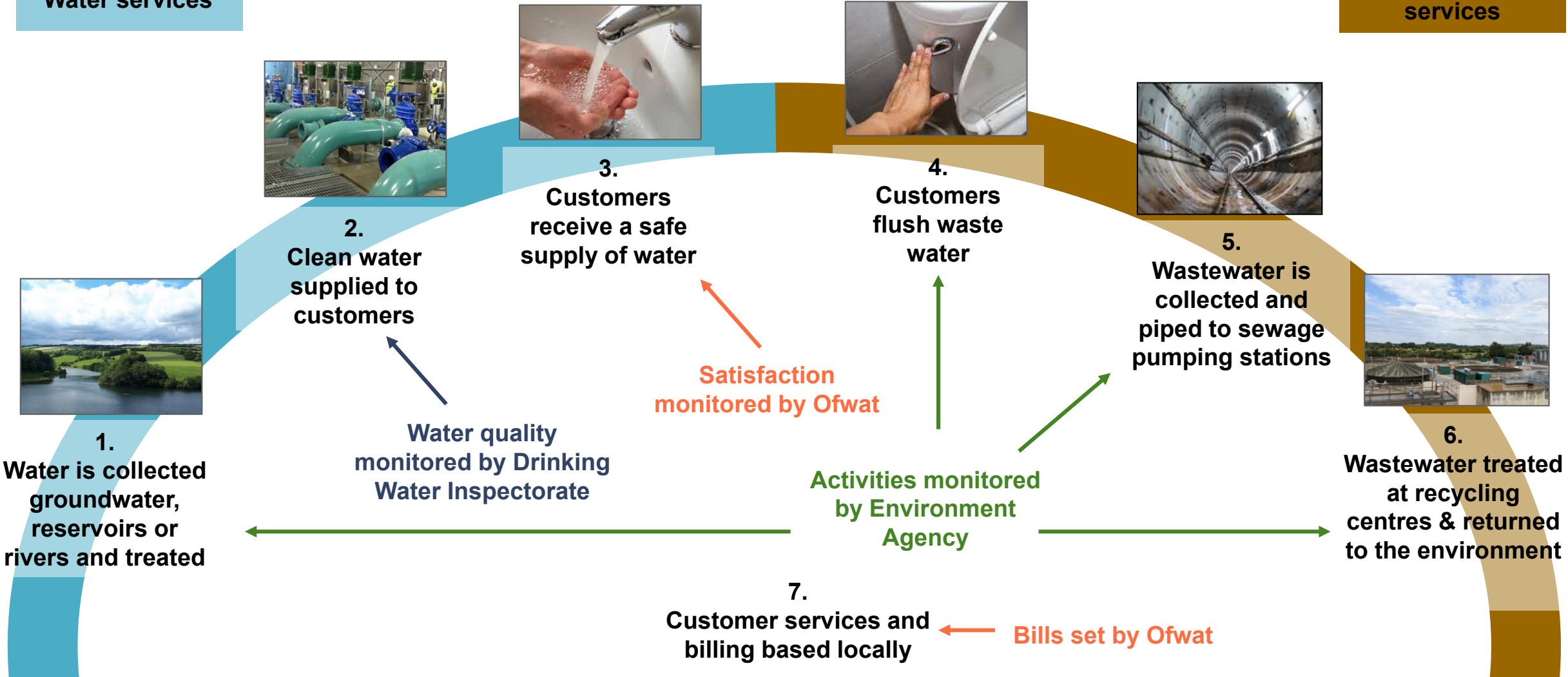


6.

Wastewater treated at recycling centres & returned to the environment

7.

Customer services and billing based locally





What impressions do you have
of your water company?

Water companies are currently part way through their five-year business plan for 2020 to 2025. They have **service level targets, called 'performance commitments'**, in every five-year business plan.

These **targets are based on what customers have previously told companies they would like them to do**, and on Ofwat's assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

We are now going to show you how well your water and/or sewerage company is doing on some of their performance commitments, compared to other water companies in England and Wales. These performance commitments are a snapshot of out of the wide range of services companies provide. We are showing these examples as customers have told us they are particularly important to them.

Water companies have to provide **reliable services**, and plan for their services to be **resilient** to changing weather patterns and demand from consumers.

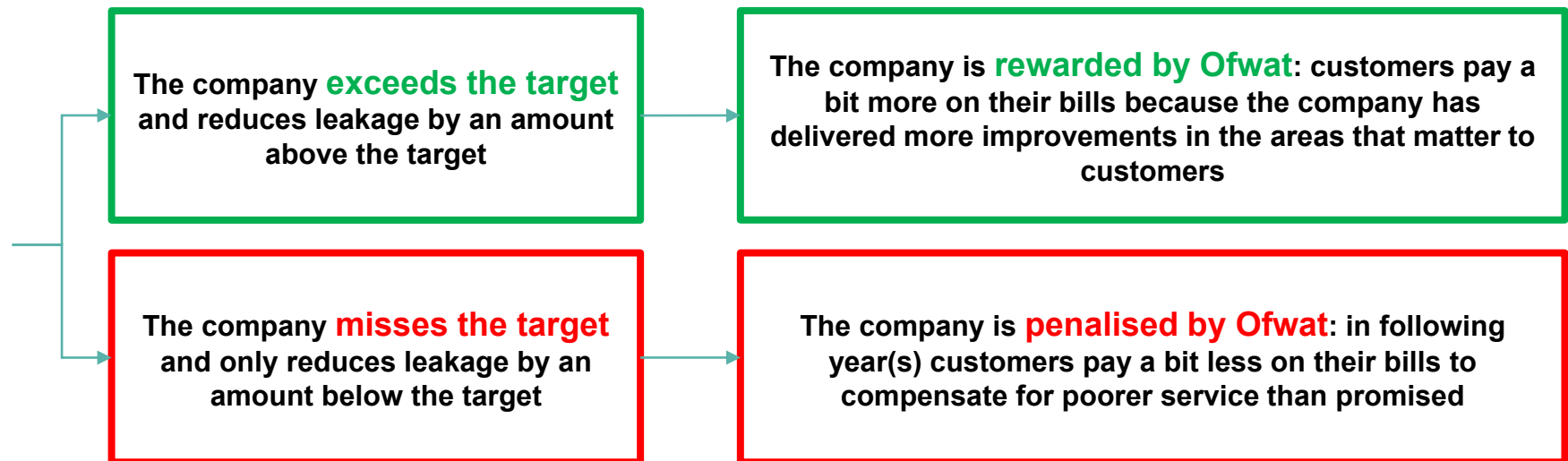
Companies can **miss** or **exceed** performance commitment targets for a number of reasons.

For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets

Example:

Water company sets a performance commitment based on customer priorities:

To reduce leakage from water mains and pipes





How has my bill been affected by Ofwat's penalties and incentives?

- Last year Wessex Water **passed 31** and **failed 11** performance commitment targets (with 2 neither passing or failing) earning them an overall reward of **£5.2m** that they could receive via customer bills (which would equate to £12 per household)
- However with bills already increasing it has deferred this reward so customer bills have not increased to pay for it.

PART TWO

Next we are showing you how Wessex Water performs in relation to other water companies across England and Wales

- The water industry uses a number of measures to assess performance. Because the water companies are very different in size and number of customers, these measures are often 'normalised' to give a fair comparison
 - E.g. on the next slide you'll see information about the number of minutes households are without water per property per year. This is an average: in reality, most houses don't experience problems but some will be without water for longer periods. But to be able to compare companies, the total interruption time is divided by all households in the region
- Please read the information and consider where you are happy with Wessex Water's performance – and where you would like to see improvements.

If a water supply is interrupted without warning for over 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

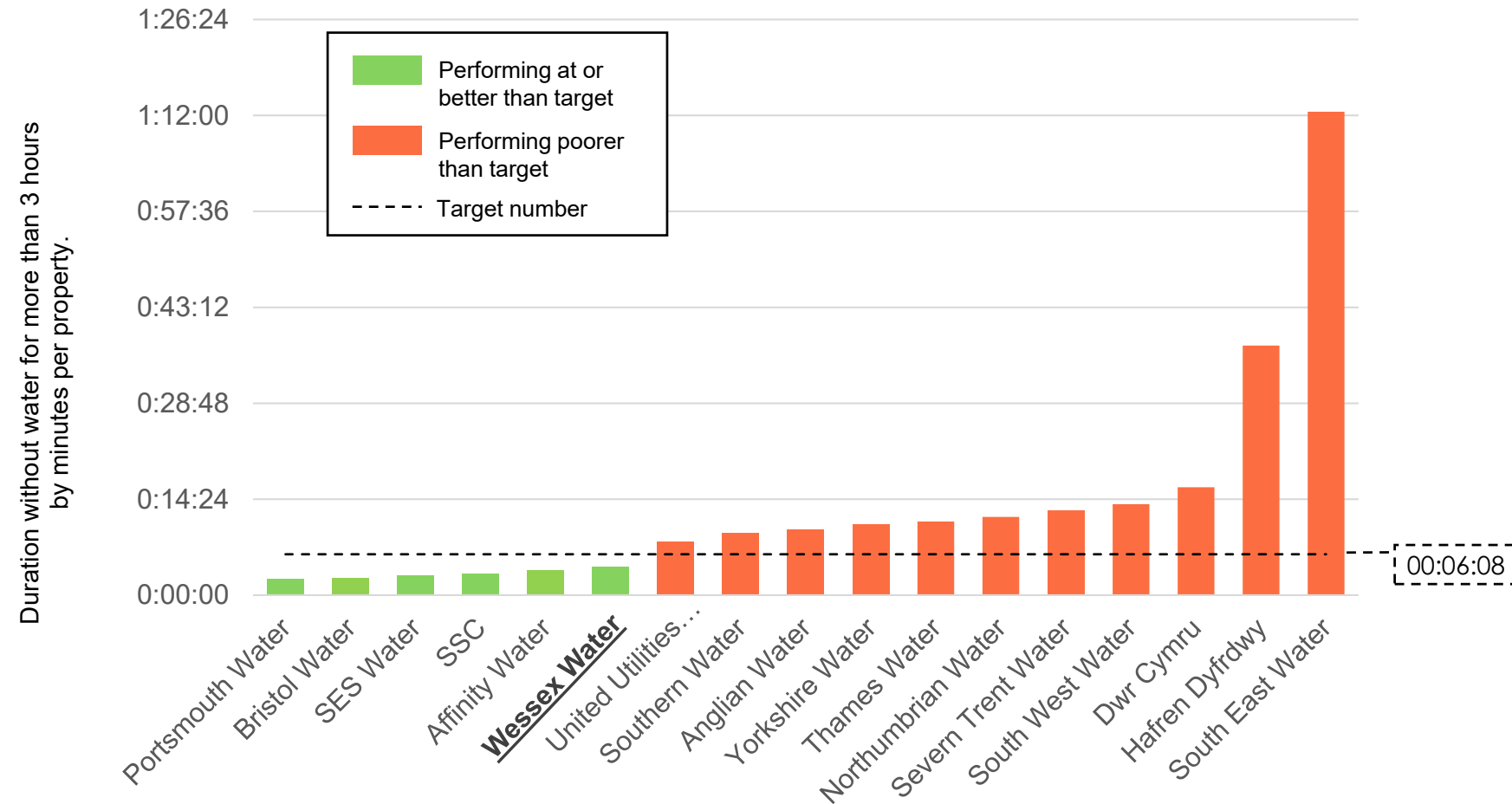
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-62%
Bristol Water	-59%
SES Water	-52%
SSC	-47%
Affinity Water	-39%
Wessex Water	-32%
United Utilities Water	+30%
Southern Water	+53%
Anglian Water	+60%
Yorkshire Water	+73%
Thames Water	+80%
Northumbrian Water	+92%
Severn Trent Water	+106%
South West Water	+123%
Dwr Cymru	+164%
Hafren Dyfrdwy	+511%
South East Water	+1083%

Water companies measured on the length of time properties are without water.



Duration without water for more than 3 hours
by minutes per property.
(A lower bar / number is better.)



The appearance, taste and smell of tap water

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.

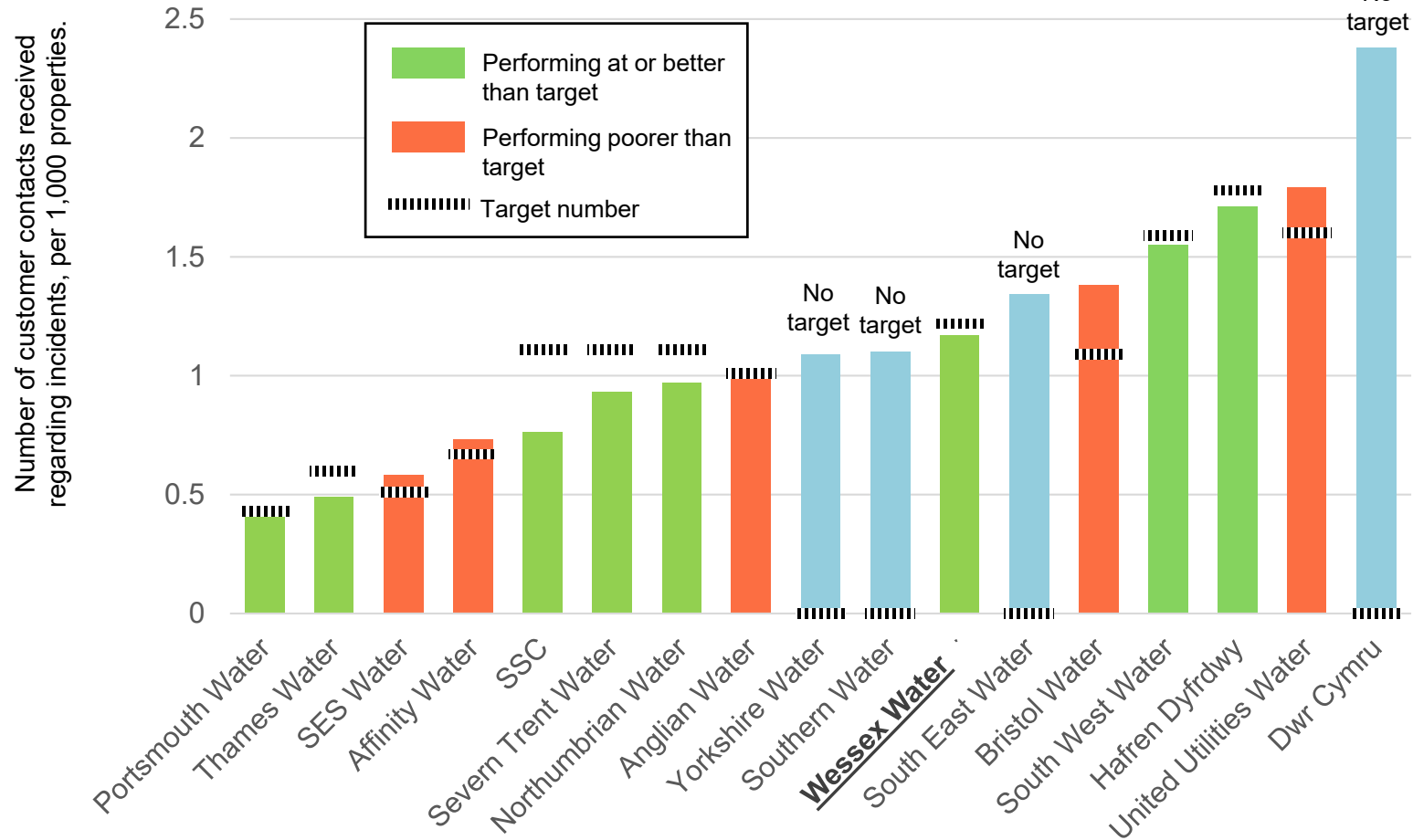
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-5%
Thames Water	-18%
SES Water	+14%
Affinity Water	+9%
SSC	-32%
Severn Trent Water	-16%
Northumbrian Water	-13%
Anglian Water	+2%
Yorkshire Water	No target
Southern Water	No target
Wessex Water	-4%
South East Water	No target
Bristol Water	+27%
South West Water	-3%
Hafren Dyfrdwy	-4%
United Utilities Water	+12%
Dwr Cymru	No target

Water companies measured on the number of customer contacts regarding the appearance, taste and smell of tap water.



Number of customer contacts received regarding incidents, per 1,000 people.
(A lower number is better.)



Sewage flooding of properties

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.

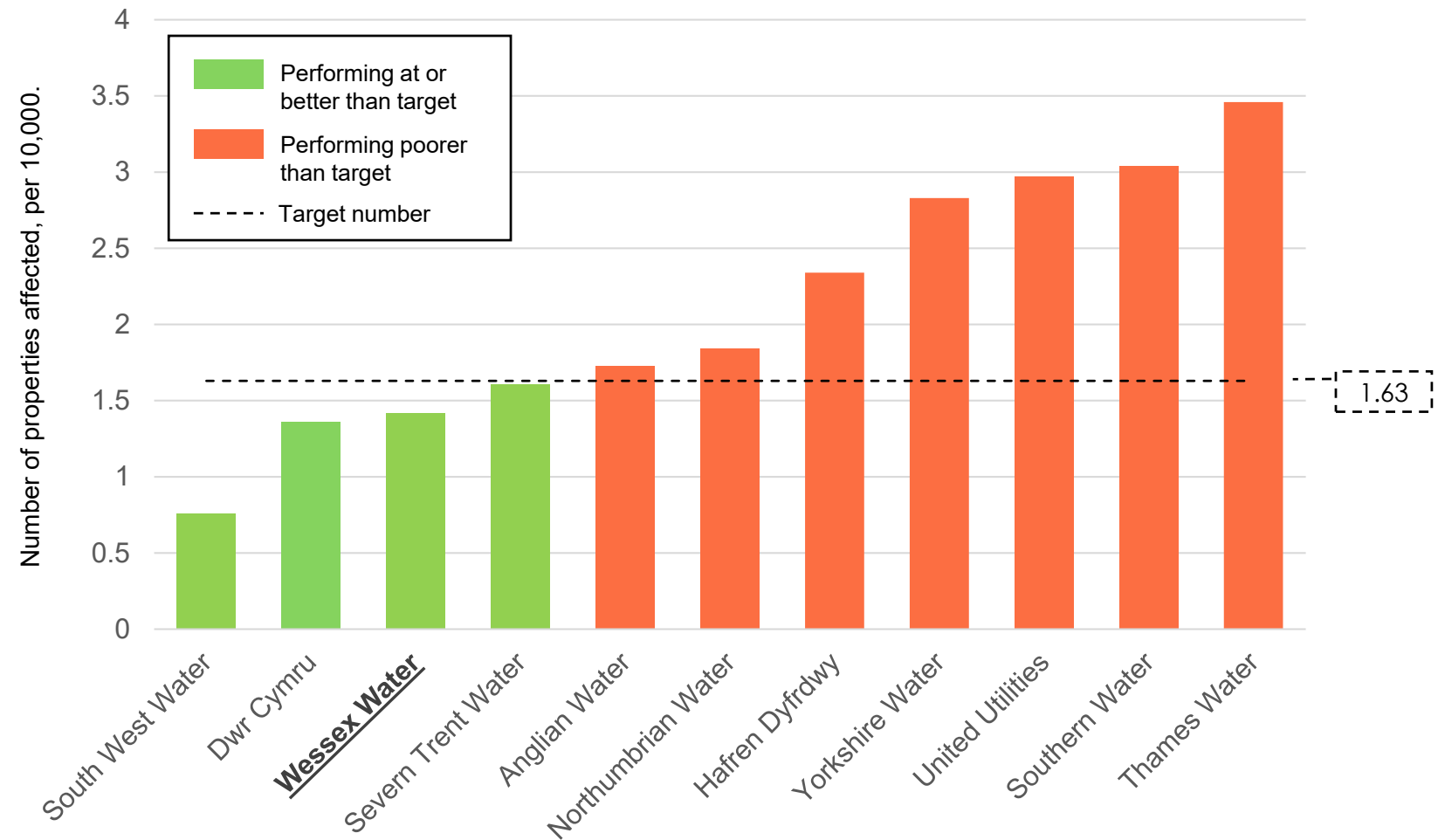
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
South West Water	-53%
Dwr Cymru	-17%
<u>Wessex Water</u>	<u>-13%</u>
Severn Trent Water	-1%
Anglian Water	+6%
Northumbrian Water	+13%
Hafren Dyfrdwy	+44%
Yorkshire Water	+74%
United Utilities Water	+82%
Southern Water	+87%
Thames Water	+112%

Water companies measured on the incidents of sewage flooding properties.



Number of properties affected, per 10,000.
(A lower number is better.)



Sewage flooding of gardens or outbuildings

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

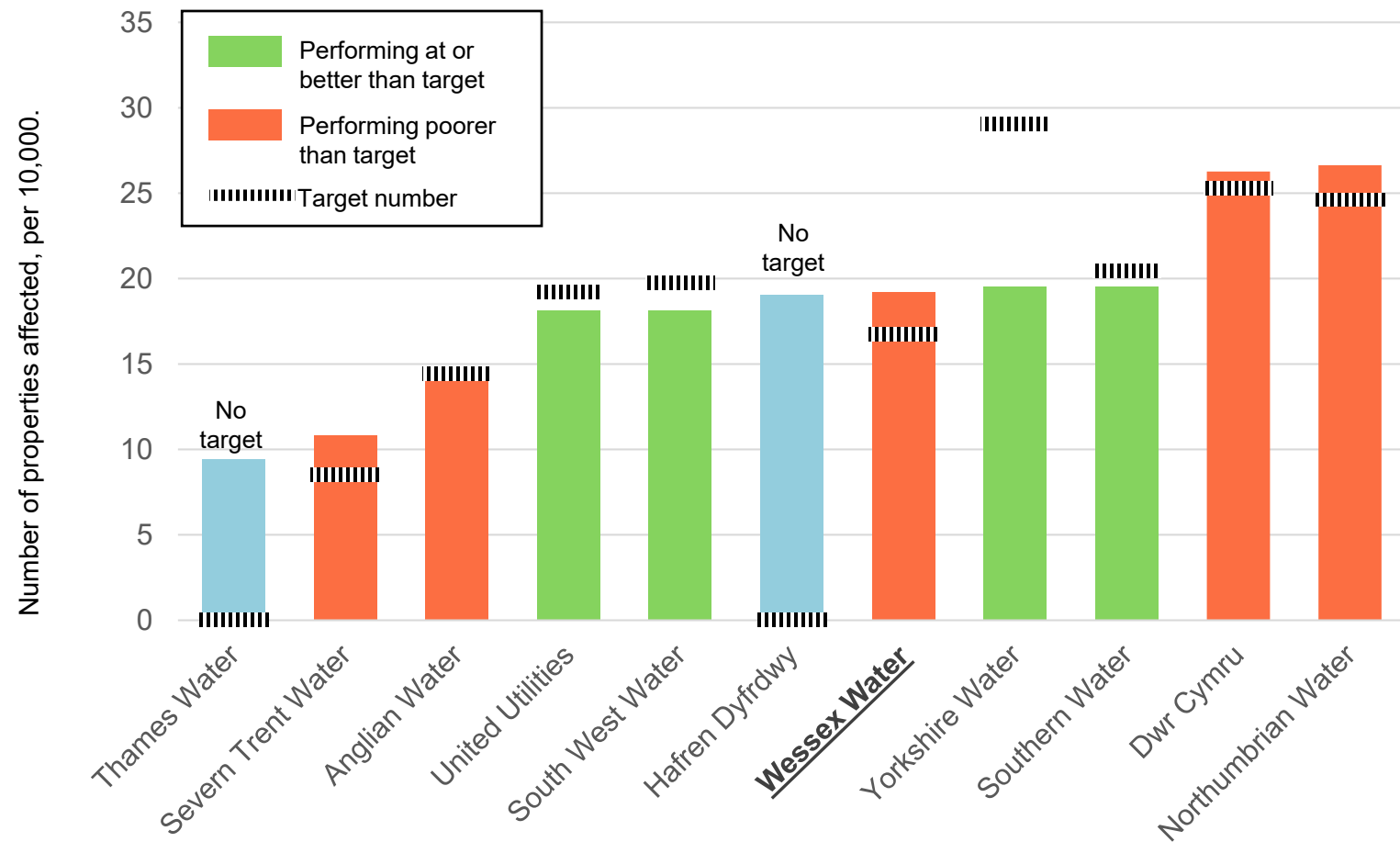
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Thames Water	No target
Severn Trent Water	+27%
Anglian Water	+1%
United Utilities Water	-6%
South West Water	-8%
Hafren Dyfrdwy	No target
Wessex Water	+15%
Yorkshire Water	-33%
Southern Water	-4%
Dwr Cymru	+4%
Northumbrian Water	+8%

Water companies measured on the incidents of sewage flooding gardens or outbuildings.



Number of properties affected, per 10,000.
(A lower number is better.)



Reducing leaks

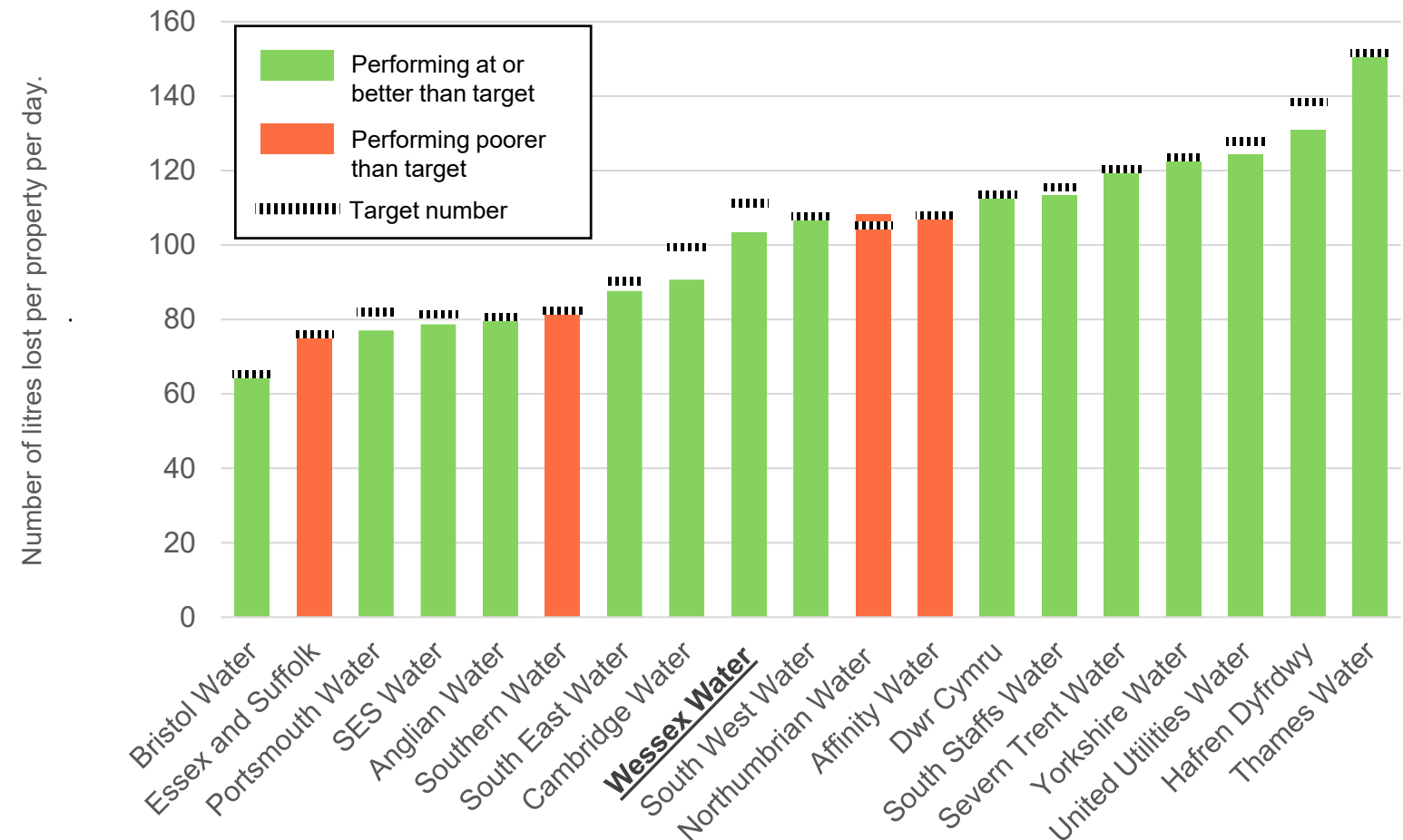
Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Bristol Water	-0.3%
Essex and Suffolk	+0.5%
Portsmouth Water	-6.0%
SES Water	-3.3%
Anglian Water	-0.5%
Southern Water	+1.1%
South East Water	-2.8%
Cambridge Water	-8.8%
Wessex Water	-7.1%
South West Water	0%
Northumbrian Water	+2.9%
Affinity Water	+0.6%
Dwr Cymru	-1.0%
South Staffs Water	-1.7%
Severn Trent Water	-0.6%
Yorkshire Water	-0.5%
United Utilities Water	-2.9%
Hafren Dyfrdwy	-5.3%
Thames Water	0%

Water companies measured on the amount of water lost due to leaks from water mains and pipes.

Number of litres lost per property per day.
(A lower number is better.)



Pollution of rivers and bathing waters

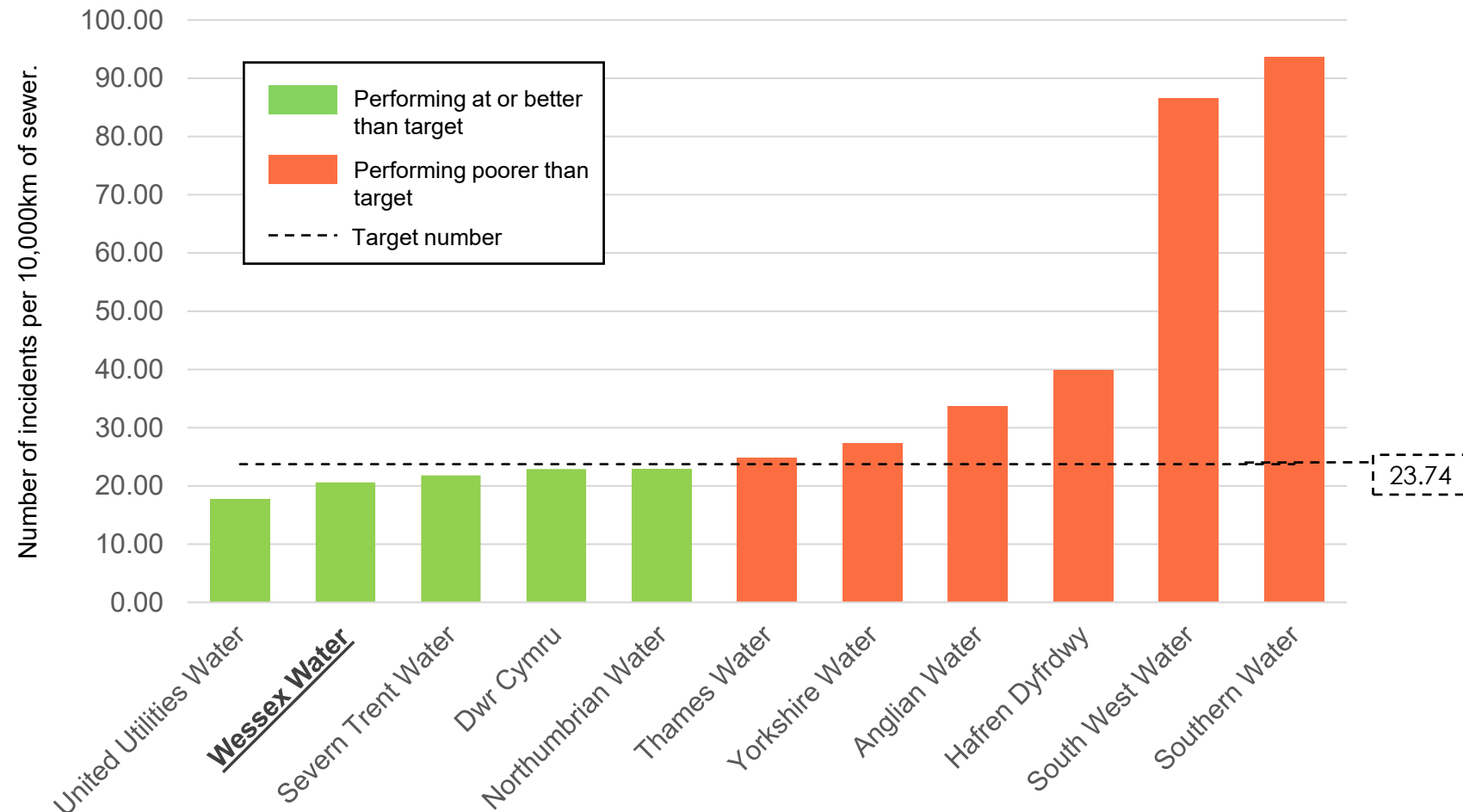
Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale.

Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
United Utilities Water	-25.3%
Wessex Water	-13.2%
Severn Trent Water	-8.1%
Dwr Cymru	-3.6%
Northumbrian Water	-3.2%
Thames Water	+4.7%
Yorkshire Water	+15.3%
Anglian Water	+42.2%
Hafren Dyfrdwy	-70.9%
South West Water	+264.7%
Southern Water	+294.4%

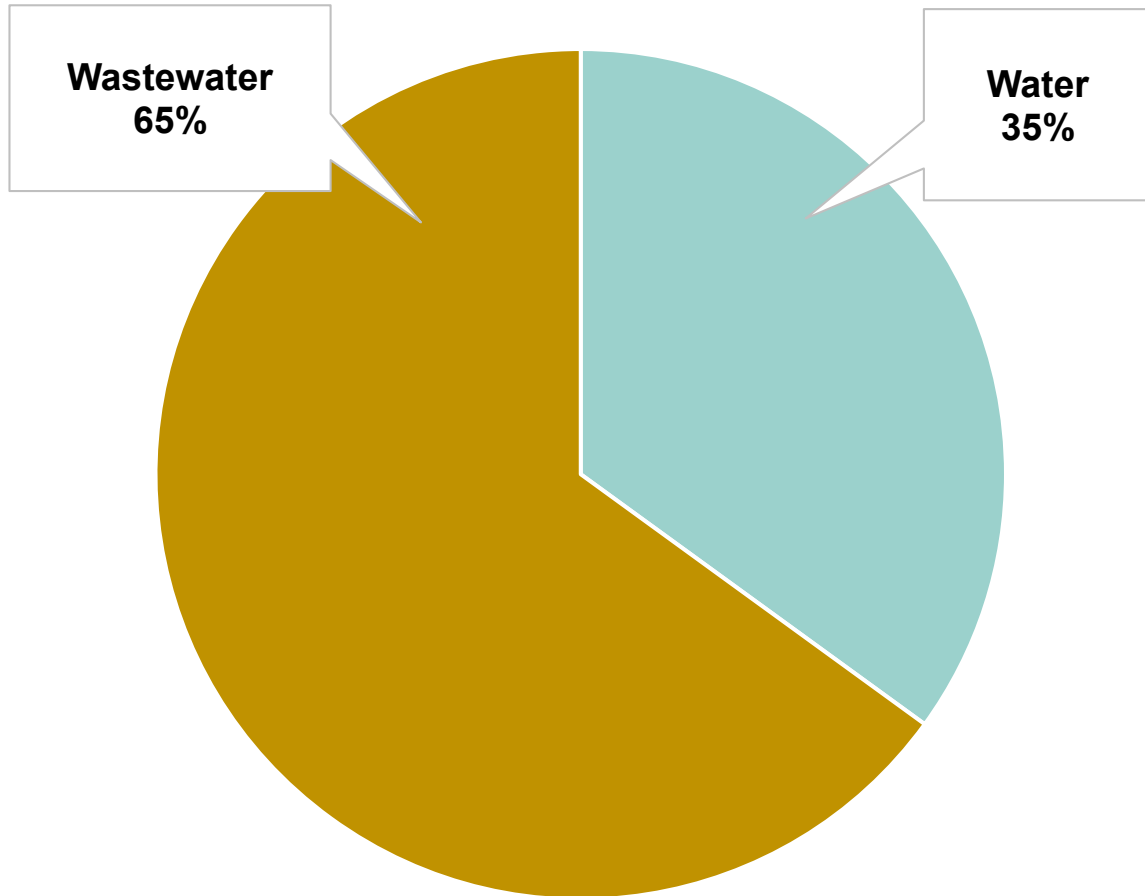
Water companies measured on the number of incidents of pollution of rivers and streams.

Number of incidents per 10,000km of sewer.
(A lower number is better.)

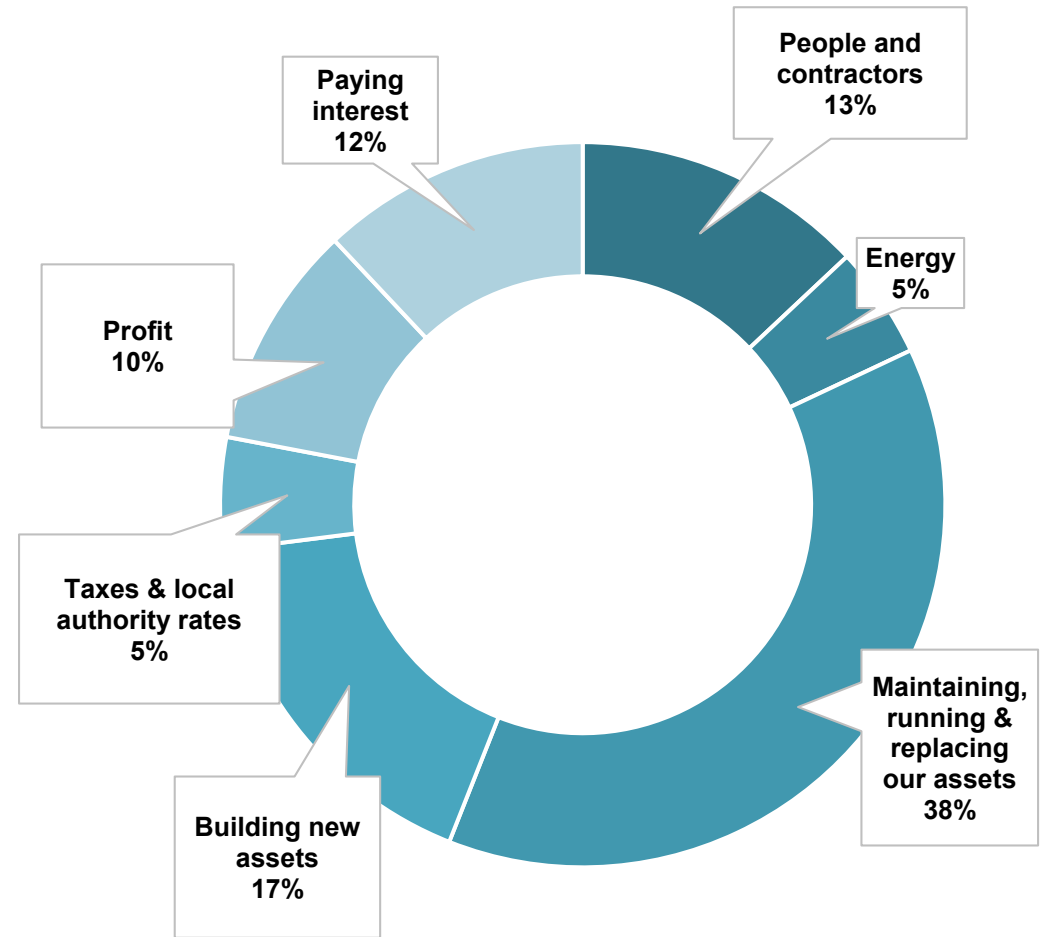


Household bill breakdown

Split for every £1 spent for an average customer



How the household bill breaks down





Supply interruptions



Water Quality



Internal sewer flooding



External sewer flooding

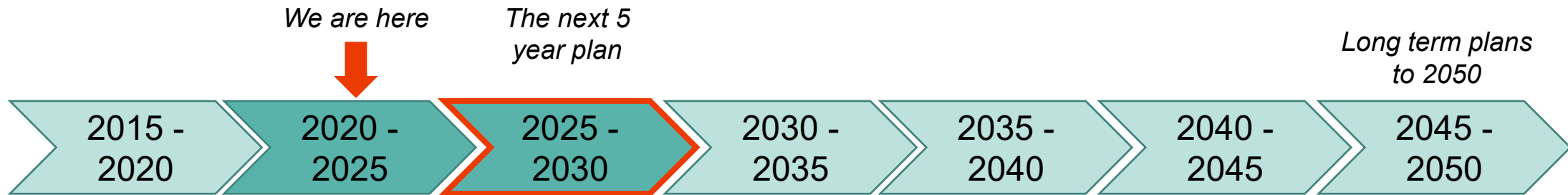


Leakage



Pollution

What impressions do you have of the performance?



- The 5 year plan is designed to be the first step to achieving longer term ambitions
- The longer term timeframe is 25 years – to 2050

Climate change impacts



- Warmer, drier summers and wetter winters predicted
- More frequent droughts and floods
- Adapting to climate change
- Reaching net zero

Population changes



- Meeting supply & waster needs for new housing
- Managing pollution risks from increasing sewer use
- Building sustainable drainage for storm water

New and existing statutory requirements



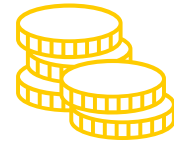
Managing:

- Pollution risks
- Sustainable water 'abstraction'
- Supply & demand: reducing what we use

Protecting rivers and coasts & environmental protections

Water quality

Economic factors



- Cost of living crisis
- Affordability of bills
- Inflation











Reflecting on the current
economic situation



Wessex Water has 8 long term outcomes

This is what they aim to achieve by 2050

<p>Affordable bills</p> 	<p>Zero water poverty – no one spending more than 5% of their disposable income on their water bill</p>	<p>Safe and reliable water</p> 	<ul style="list-style-type: none"> • 100% compliance with drinking water standards, always • Zero supply interruptions of longer than 3 hours.
<p>Effective sewerage system</p> 	<p>Halve the impact of sewer flooding on our customers</p>	<p>Great customer experience</p> 	<p>Be a top 10 customer service provider in the UK</p>
<p>Managing demand for water</p> 	<p>Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences</p>	<p>Great river & coastal water</p> 	<ul style="list-style-type: none"> • To restore the quality of our rivers and coastal waters • Zero pollution incidents
<p>Net zero carbon</p> 	<p>Be a net zero carbon business by 2040</p>	<p>Biodiversity</p> 	<p>Double our contribution to the region's biodiversity</p>

1

Proposed plan

This is Wessex Water's proposed plan and includes extra work over and above what they are required by law to provide extra benefits to customers, the environment and local communities

2

'Must do' plan

This plan allows Wessex Water to carry out the work that they are required to do by law

Also the **least cost** plan

Proposed business plan

Wessex Water proposes an investment plan for 2025-30 to start to meet its long term goals.







2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system	<i>Halve the impact of sewer flooding on our customers</i>		Reducing the number of sewage spills in 150 locations	£23	Reducing internal and external sewer flooding	£11	Reduce sewage spills in further 45 locations	£11
Managing demand for water	<i>Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences</i>				Reducing leaks	£6	Install smart meters in 90% of all properties	£15
Great river & coastal water	<ul style="list-style-type: none"> To restore the quality of our rivers and coastal waters Zero pollution incidents 		Nutrient removal	£47	Reduce pollution incidents to 14 per 10k of sewer pipe	£4		
Safe and reliable water	<ul style="list-style-type: none"> 100% compliance with drinking water standards, always Zero supply interruptions of more than 3 hours. 				Keep supply interruptions at 5 mins per property	£0	Replace 12,000 lead pipes	£2
					Reduce contacts re taste, smell, look	£2		
Great customer experience	<i>Be a top 10 customer service provider in the UK</i>				Removing everyone from water poverty		£24	
Net zero carbon & biodiversity	<i>Be a net zero carbon business By 2040</i>				Reduce carbon & pollutants from sewer sludge		£8	
					Operationally net zero		£6	

With the proposed plan, your bill will increase by, on average, £32.49 a month (£390 a year) by 2030.

This includes:

- £10.26 a month statutory investment
- £7.99 a month additional investment
- £14.24 a month of inflation.

There are 3 different types of investments in the plan:

Legally required investments

No say

All water companies are required to invest in new improvements ***to comply with laws including new environmental legislation.***

Customers do not have a say in whether these investments go ahead.

Investments to meet 5 year performance targets

Customer feedback

All water companies are ***stipulated by regulators*** to set ambitious performance targets.

Customers do have some say in determining whether the targets are ambitious enough – or too ambitious – or too costly.

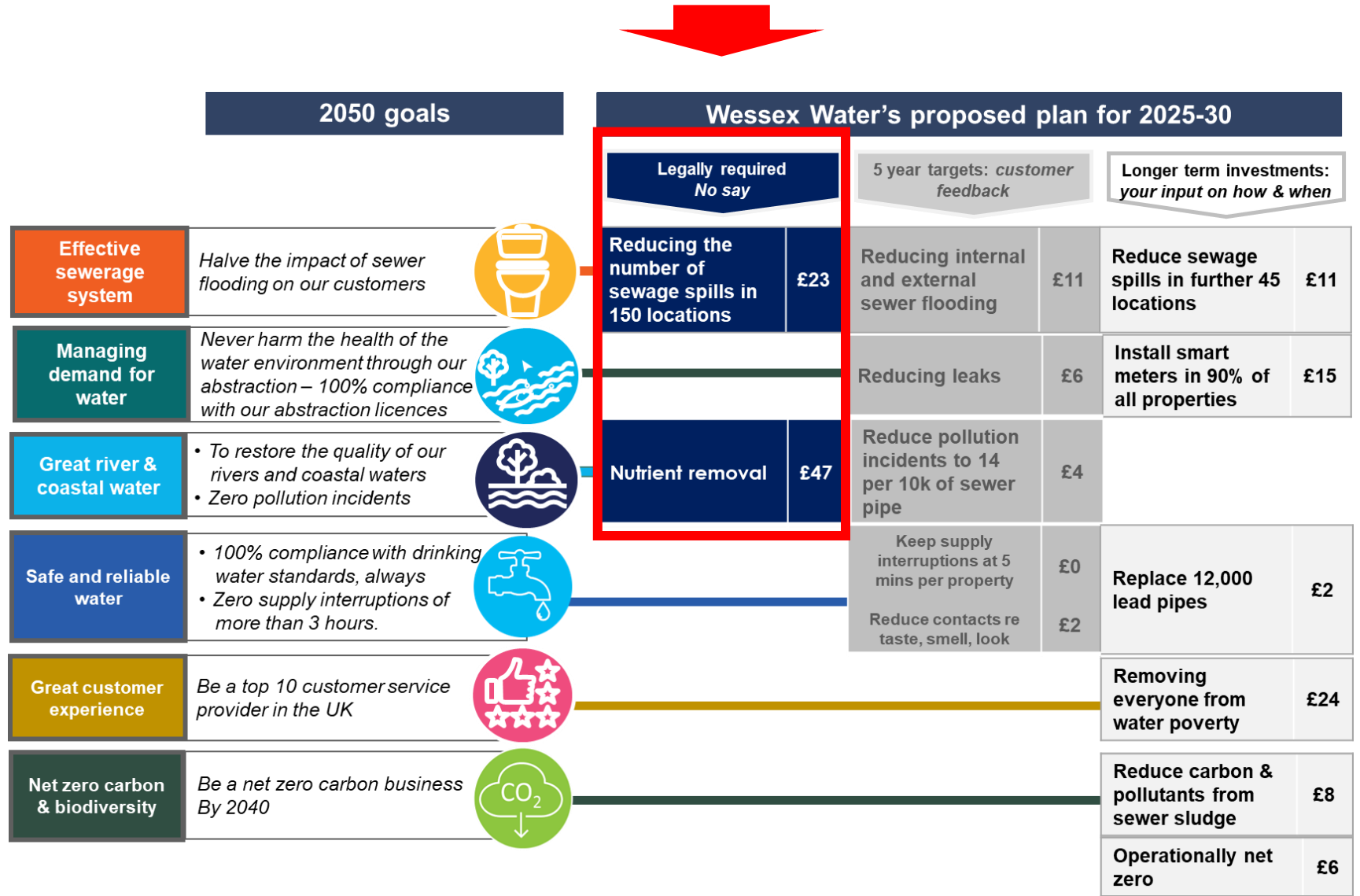
Longer term investments

Customer input: how & when

All water companies can propose investments in addition to the minimum requirements ***to help meet longer term goals.***

Customers have a large say and can give a view on what they think is the appropriate scale and pace of any additional investments.

What Wessex is legally required to do



An effective sewerage system

Legally required
No say

Reducing the
number of sewage
spills in 150
locations

£23 per year



2050 target:

To halve the number of sewer flooding incidents.



Storm overflows

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. This helps to reduce the risk of properties being flooded with sewage.

There are around 15,000 storm overflows in England, and 1,300 for Wessex Water.

Each company (in England) has a target set by Government to reduce the use of storm overflows:

- By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites
- By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm

Wessex Water will need to spend £540m to meet these requirements for 2025-2030, and this will add £23 per year to the average household water bill.



2050 target

To restore the quality of rivers and coastal waters

Legally required
No say

**Nutrient removal
and river water
quality monitoring**

£47 per year



The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.

- Excess nitrogen and phosphorus can affect the health of river and coastal waters, negatively impacting plant and wildlife who live there
- A large portion of Wessex Water's region has been designated as requiring additional nutrient removal to allow a further 70,000 homes to be built
- As a result, Wessex Water needs to remove 1,500 tonnes of nitrogen and phosphorus from entering rivers and the sea. This will improve river water quality and help unblock the housing backlog across the country
- Partnership working with farmers and landowners will be vital – and using nature-based solutions where possible, which are often cheaper, create less carbon, and increase biodiversity

Wessex Water will need to spend £830m to meet these requirements for 2025-2030, and this will add £47 per year to the average household water bill.



How acceptable or unacceptable do you find these legally required investments?



Wessex Water's proposed 5 year targets – your feedback on these

2050 goals		Wessex Water's proposed plan for 2025-30			
		Legally required No say	5 year targets: <i>customer feedback</i>		Longer term investments: <i>your input on how & when</i>
Effective sewerage system <i>Halve the impact of sewer flooding on our customers</i>		Reducing the number of sewage spills in 150 locations £23	Reducing internal and external sewer flooding £11	Reduce sewage spills in further 45 locations £11	
Managing demand for water <i>Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences</i>			Reducing leaks £6	Install smart meters in 90% of all properties £15	
Great river & coastal water <ul style="list-style-type: none"> To restore the quality of our rivers and coastal waters Zero pollution incidents 		Nutrient removal £47	Reduce pollution incidents to 14 per 10k of sewer pipe £4		
Safe and reliable water <ul style="list-style-type: none"> 100% compliance with drinking water standards, always Zero supply interruptions of more than 3 hours. 			Keep supply interruptions at 5 mins per property £0	Replace 12,000 lead pipes £2	
			Reduce contacts re taste, smell, look £2		
Great customer experience <i>Be a top 10 customer service provider in the UK</i>				Removing everyone from water poverty £24	
Net zero carbon & biodiversity <i>Be a net zero carbon business By 2040</i>				Reduce carbon & pollutants from sewer sludge £8	
				Operationally net zero £6	



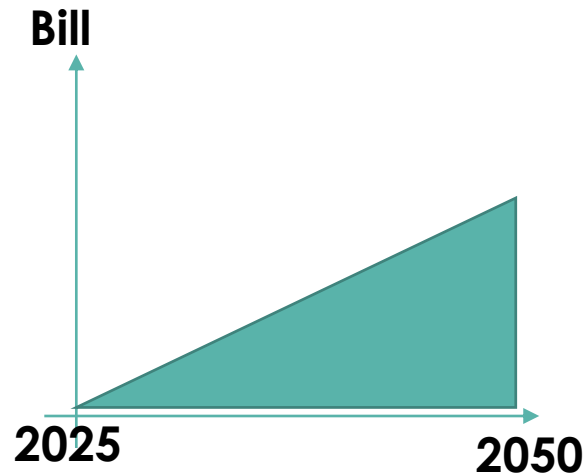
Wessex Water proposes the following targets for 2025-30 to start to meet its long term goals.

			TODAY's performance	Target performance by 2030	What this will add to your bill
Supply interruptions		Average time without water per household	5 mins	5 mins	£0
Water Quality		Contacts per 1,000 population	1.17 contacts	1 contact	£2
Internal sewer flooding		Incidents per 10,000 properties	1.43 incidents	1.04 incidents	} £11
External sewer flooding		Incidents per 10,000 properties	19.27 incidents	14.5 incidents	
Leakage		Number of litres lost per property per day	103.29 litres	93.02 litres	£6
Pollution		Incidents per 10,000km of sewer	20.6 incidents	17.6 incidents	£4



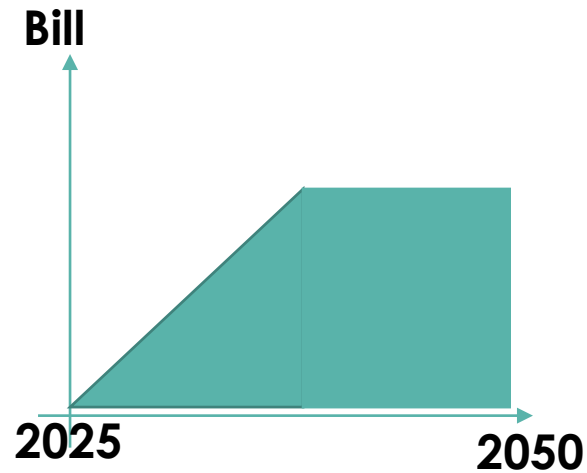
Longer term investments – your input on how and when they do these...

2050 goals		Wessex Water's proposed plan for 2025-30					
		Legally required No say	5 year targets: customer feedback		Longer term investments: your input on how & when		
Effective sewerage system	Halve the impact of sewer flooding on our customers	Reducing the number of sewage spills in 150 locations	£23	Reducing internal and external sewer flooding	£11	Reduce sewage spills in further 45 locations	£11
Managing demand for water	Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences			Reducing leaks	£6	Install smart meters in 90% of all properties	£15
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Great customer experience	Be a top 10 customer service provider in the UK					Removing everyone from water poverty	£24
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						Operationally net zero	£6



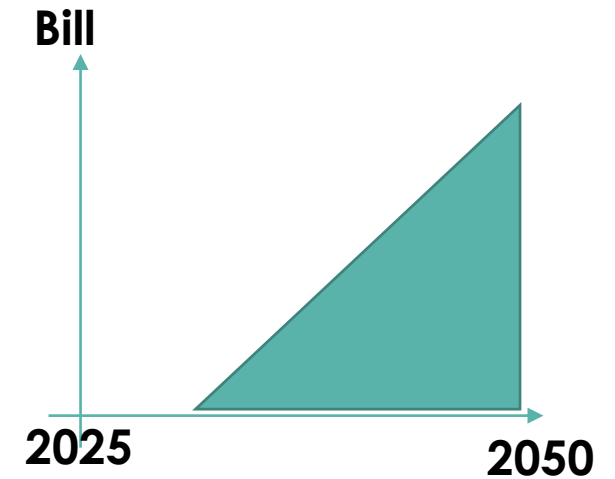
Bills rise steadily over time, and there is an even level of improvement over time

*In this scenario, **today's bill payers and future bill payers** will see a steady increase to their bills*



Bills increase in the next few years, allowing improvements to be made sooner.

*In this scenario, **today's bill payers** will see the biggest increase to bills*



No bill increase now, then the bill increases more sharply so the benefits are delivered later

*In this scenario, **future bill payers** will see the biggest increase to bills*



2050 target:
100% of lead pipes replaced

Discretionary investments
You decide

Replacing 12,000
lead pipes

£2

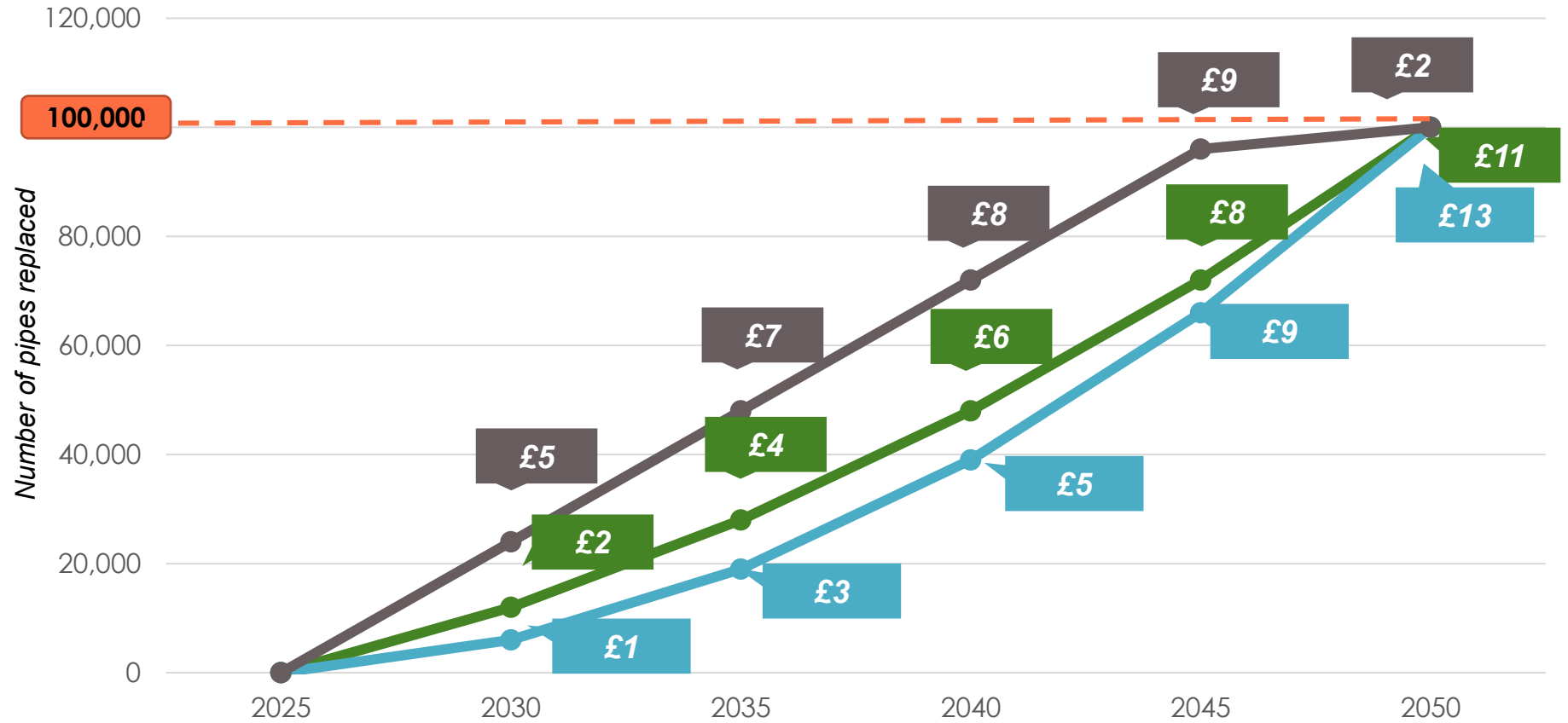
The proposal is to replace 12,000 customer lead pipes in the next per 5-year period, increasing the rate of replacement thereafter to complete full replacement by 2050.

- Lead pipes are estimated to affect 100,000 properties (which is 18% of all households in the region)
- Replacement would involve the ‘communication pipe’ that runs from the mains to the wall of the house (not within the house)

Wessex Water propose to spend £28.2m on replacing lead pipes, and this would add £2 to the average bill.

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period



A is the proposed plan.

B is the slower plan

C is the fastest plan

Discretionary investments
You decide

Replacing 12,000
lead pipes

£2 per year

- A: Spread investment & bills over 25 years: more pipes removed earlier than the lower cost plan
- B: Delay investment now; accelerate investment in the 2040s
- C: Investment (and bills) frontloaded to remove more lead pipes sooner

Discretionary investments
You decide

Introduce smart meters to manage leaks and help customers lower use

£15 per year



2050 target:

100% compliance with the amount of water it is licenced to take from rivers and groundwater.

The proposal is to have 90% of all properties installed with a smart meter by 2030. This means installing 600,000 smart meters

Wessex Water propose to spend £180m on introducing smart meters, and this would add £15 to the average bill.

Managing demand for water

The long term ambition is to have 90% of all properties installed with a smart meter. This means installing 600,000 smart meters.

Discretionary investments
You decide

Introduce smart meters to manage leaks and help customers lower use

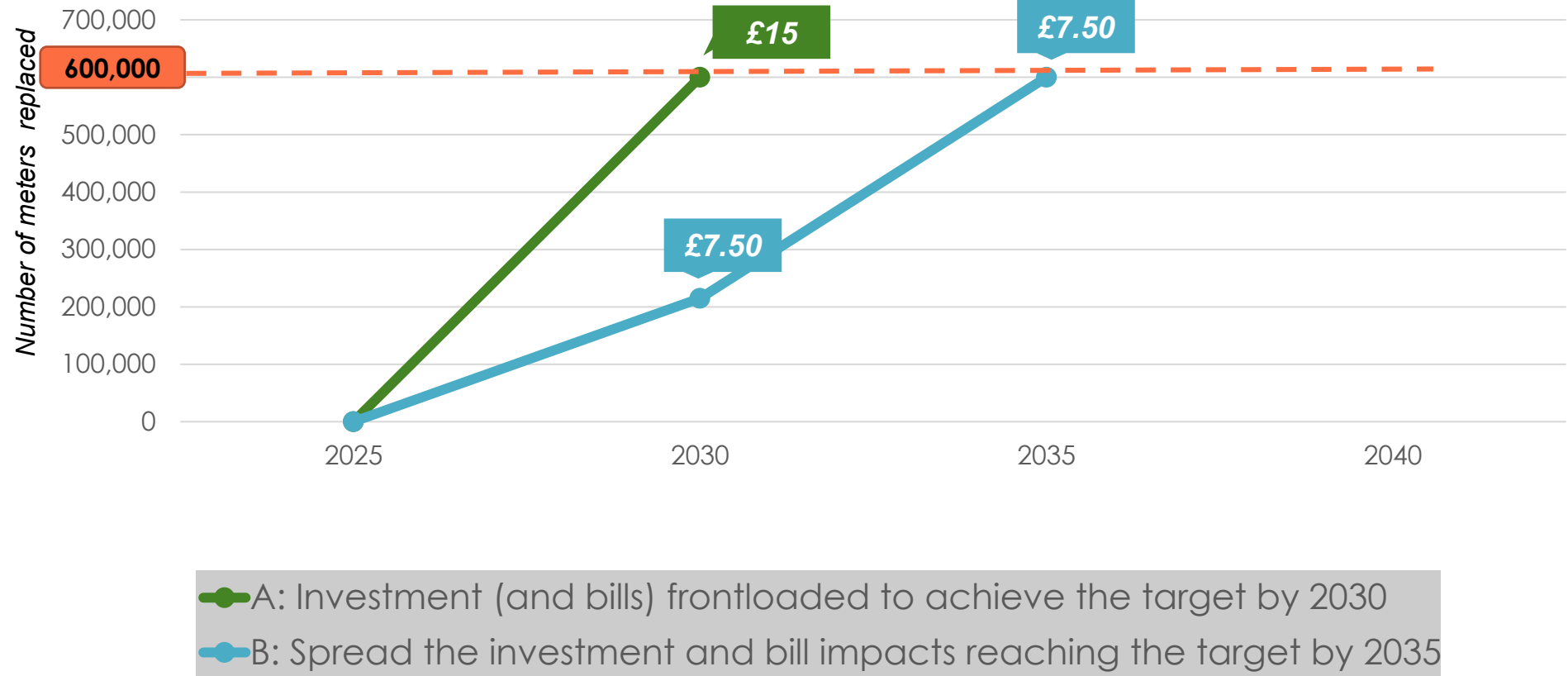
£15 per year

A is the proposed plan

B is the least cost plan

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period





2050 target:

Be a net zero carbon business by 2040

Discretionary investments
You decide

**Making all
operations net zero**

£6

Proposal for making the company's operations carbon neutral by 2030

- Moving entirely to electric vehicles
- Increasing the use of renewable electricity
- Finding the best way to reduce emissions from sewage treatment processes
- Using nature-based solutions like wetlands as an alternative to concrete structures
- Where appropriate, purchasing high-quality offsets until Wessex Water can further reduce its own emissions

Wessex Water propose to spend £37m on making all operations net zero, and this would add £6 to the average bill.

Net zero carbon and biodiversity

Discretionary investments
You decide

Making all operations net zero

£6

A is the proposed plan.

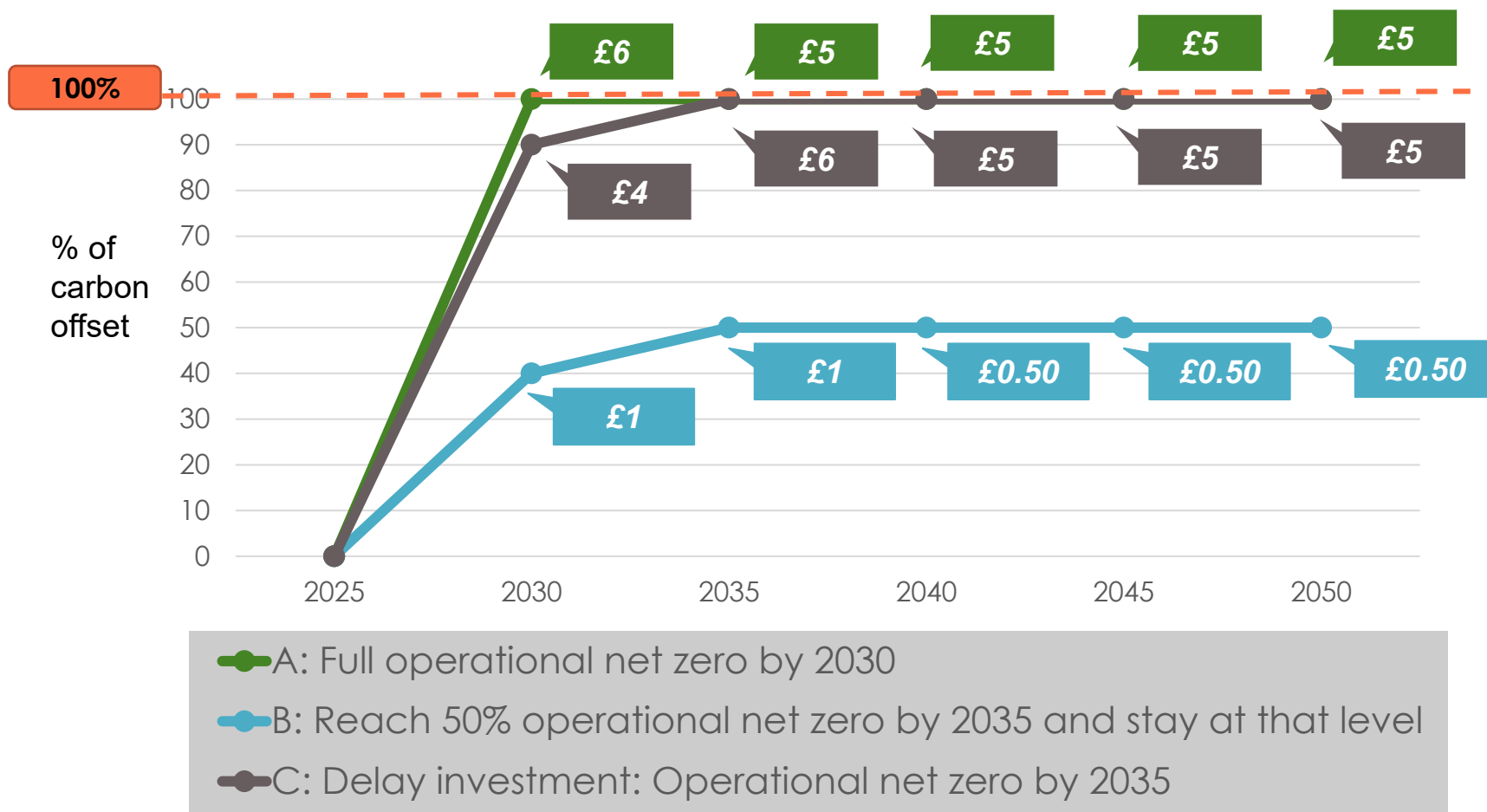
B is the less ambitious plan

C delays investment in the short term

The long term ambition is to be net zero (i.e. 100% carbon offset) by 2040 .

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period





2050 target:

Be a net zero carbon business by 2040

Discretionary investments
You decide

Removing micro
pollutants

£8

Proposal for improving the treatment of sewage sludge to remove micropollutants from being spread to land

- Trialling new technologies that, if they work, have the potential to turn the sludge into a material that does not have any carbon emissions (essentially an ash) which also destroy micropollutants in the sludge so these wouldn't be spread to land.
- If they work Wessex Water will implement these at scale in the future, reducing the carbon emissions and reducing the volume of the waste product we produce.
- Legislation does not currently prevent sludge being spread to land, but may do so in the future. Wessex Water propose to test new technology now and ensure it develops in case this change occurs

Wessex Water propose to spend £150m on removing micropollutants, and this would add £8 to the average bill.

Net zero carbon and biodiversity

Discretionary investments
You decide

Removing micro pollutants

£8

A is the proposed plan.

B is the minimum requirement plan

C is a back up plan for option A

The long term ambition is to be a net zero business by 2040.

How would you like Wessex Water to invest?

A Proposed:

Trialling & implementing new technologies to turn the sludge into a material that does not have any carbon emissions & also destroys micropollutants in the sludge such as microplastics so these wouldn't be spread to land.

B: 'Least cost' option:

- Continue to spread sludge to land by building more storage barns to cope with increasing volumes.
 - Test new sludge treatment technologies in the near term in readiness for any future legislation changes, but not roll these out.
- NB This option does not reduce carbon impact nor provide a new way to dispose of sludge.

C - Back up: If proposed plans don't work – and the ability to spread to land is significantly reduced, Wessex Water would have to install (carbon intensive) incinerators and dryers at some sites to burn the sludge. This would remove the micropollutants in the sludge

Bill impact by end of each 5 year period



An effective sewerage system

Discretionary investments
You decide

Reducing sewage
spills in a further 45
locations

£11



2050 target:

To halve the number of sewer flooding incidents.

Proposed plan for reducing sewage spills in a further 45 locations - by 2030

- Increase investment in this area from £500 million to £734 million over the five years between 2025 and 2030
- Start with storm overflows that discharge most frequently and those that have any environmental impact
- Work with communities to fit sustainable drainage solutions like soakaways
- Increase environmental and public health monitoring at key locations
- Use artificial intelligence to manage the sewerage network and provide real time bathing water information

Wessex Water propose to spend £250m on reducing sewage spills in a further 45 locations, and this would add £11 to the average bill.

An effective sewerage system

Discretionary investments
You decide

Reducing sewage spills in further 45 locations

£11

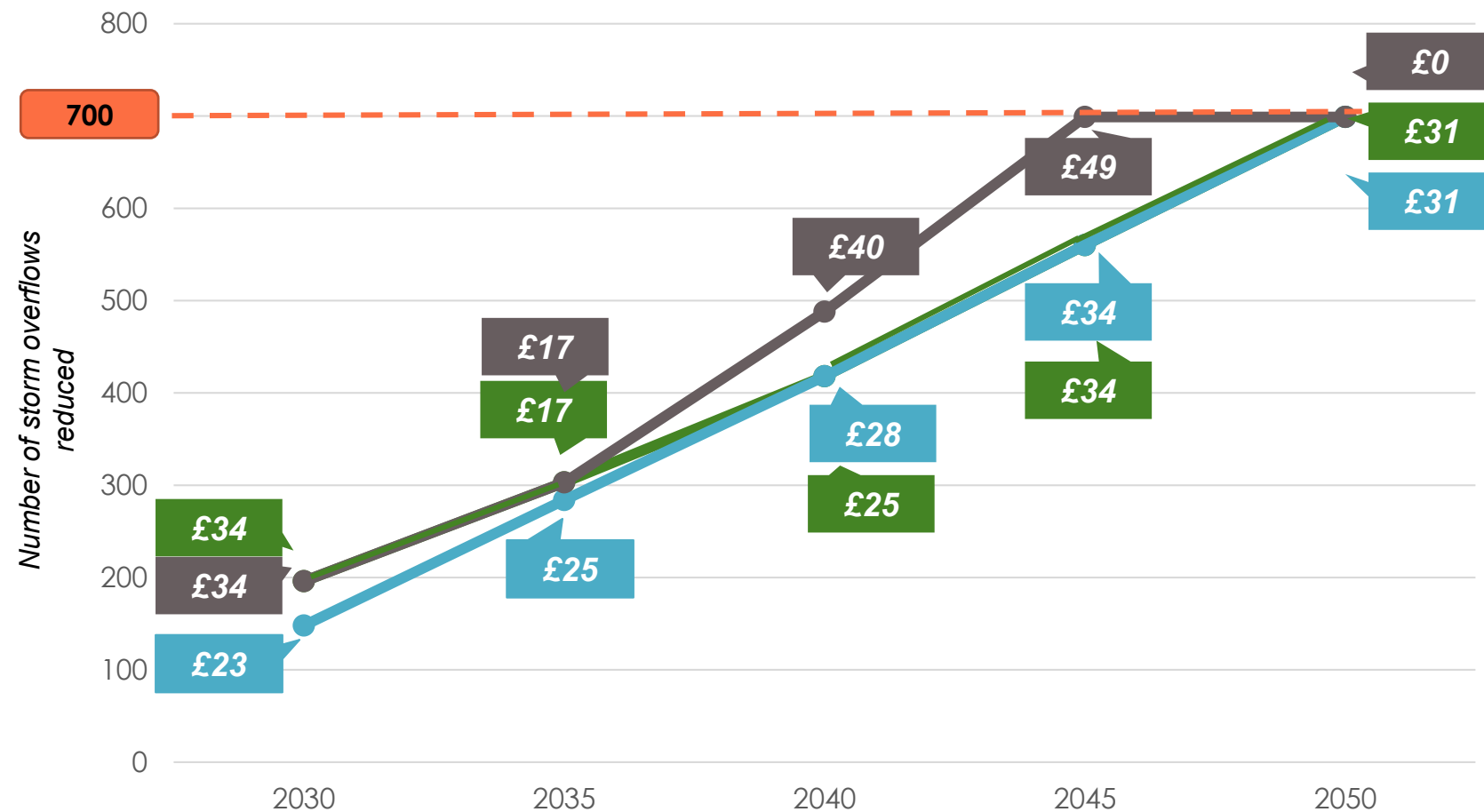
A is the proposed plan.

B is the legally required plan.

C accelerates the delivery to 2045 instead of 2050

The long-term ambition is for the spills from almost 700 overflows to be reduced in line with 2050 legislative targets

How would you like Wessex Water to pace this investment?



- A:** Proposal is to move faster than legal requirement, adding another £11 to 2025-30 bill
- B:** Least cost (legally required) plan - this £23 impact already covered earlier
- C:** this plan accelerates meeting the target - almost 700 storm overflows reduced by 2045



2050 target:

Zero water poverty – no one spending more than 5% of their disposable income on their water bill

Discretionary investments
You decide

Removing everyone
from water poverty

£24

The proposal is to remove everyone from water poverty by 2030 – which means assisting around 100,000 households

- Primarily, using the investment to give financial support to customers in water poverty; also
- Continuing to work with partners such as Citizens Advice to raise awareness and reach customers who need support
- Continuing to fund debt advice partners to increase the number of clients they can advise about bills and debt
- Making it easy to access support: using data to automatically apply bill reductions to customers without the need to complete forms
- Helping customers to save water and energy
- Funding community projects across the region

Wessex Water propose to remove everyone from water poverty by 2030. This would add £24 per to people's bills who are not on social tariffs.

Customer service & affordability

Discretionary investments
You decide

Removing everyone from water poverty

£24

A is the proposed plan.

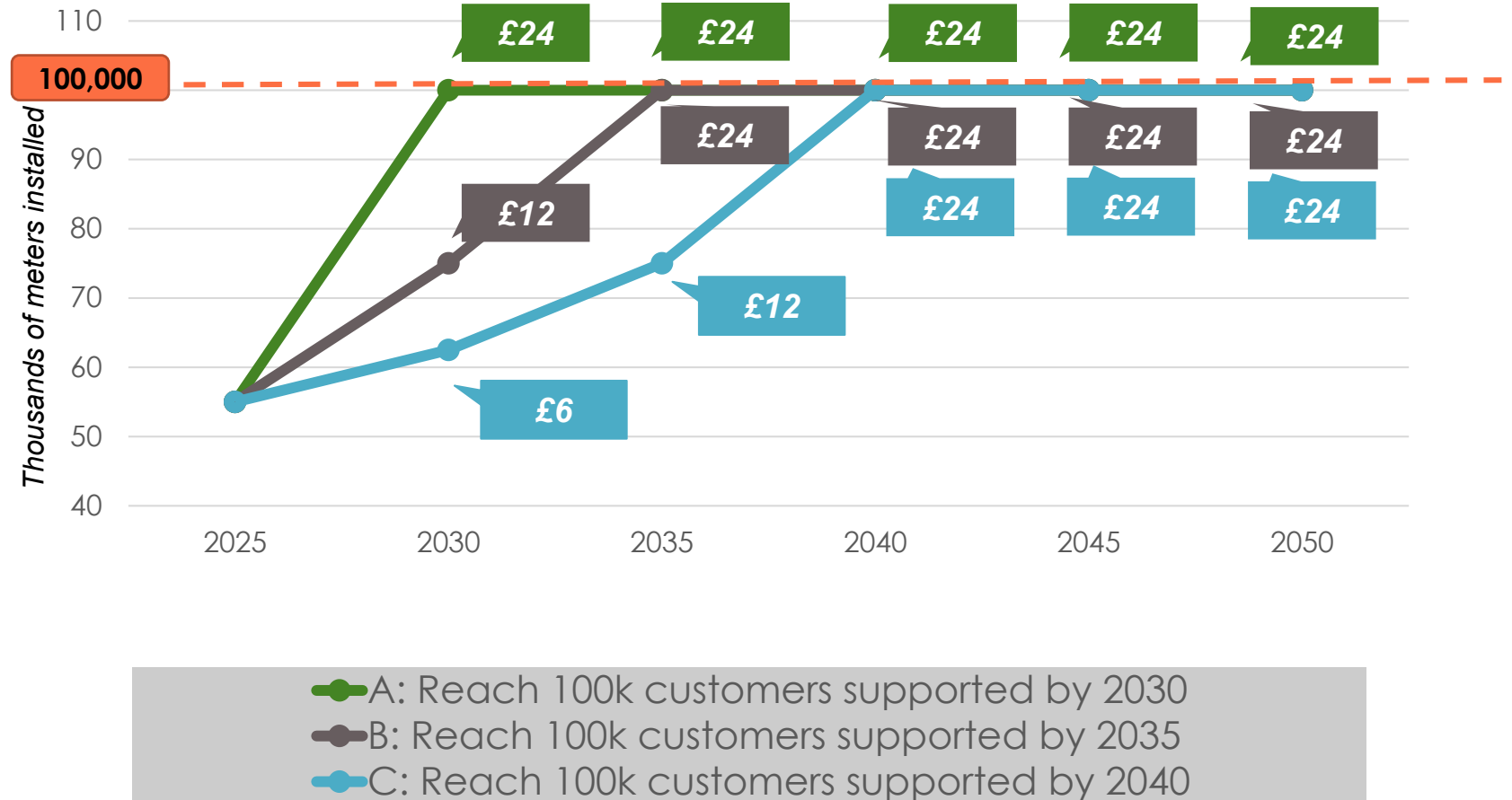
B is the slowest plan.

C delays investment but not as much as B

The long-term ambition is for 100,000 customers to be lifted out of water poverty

55

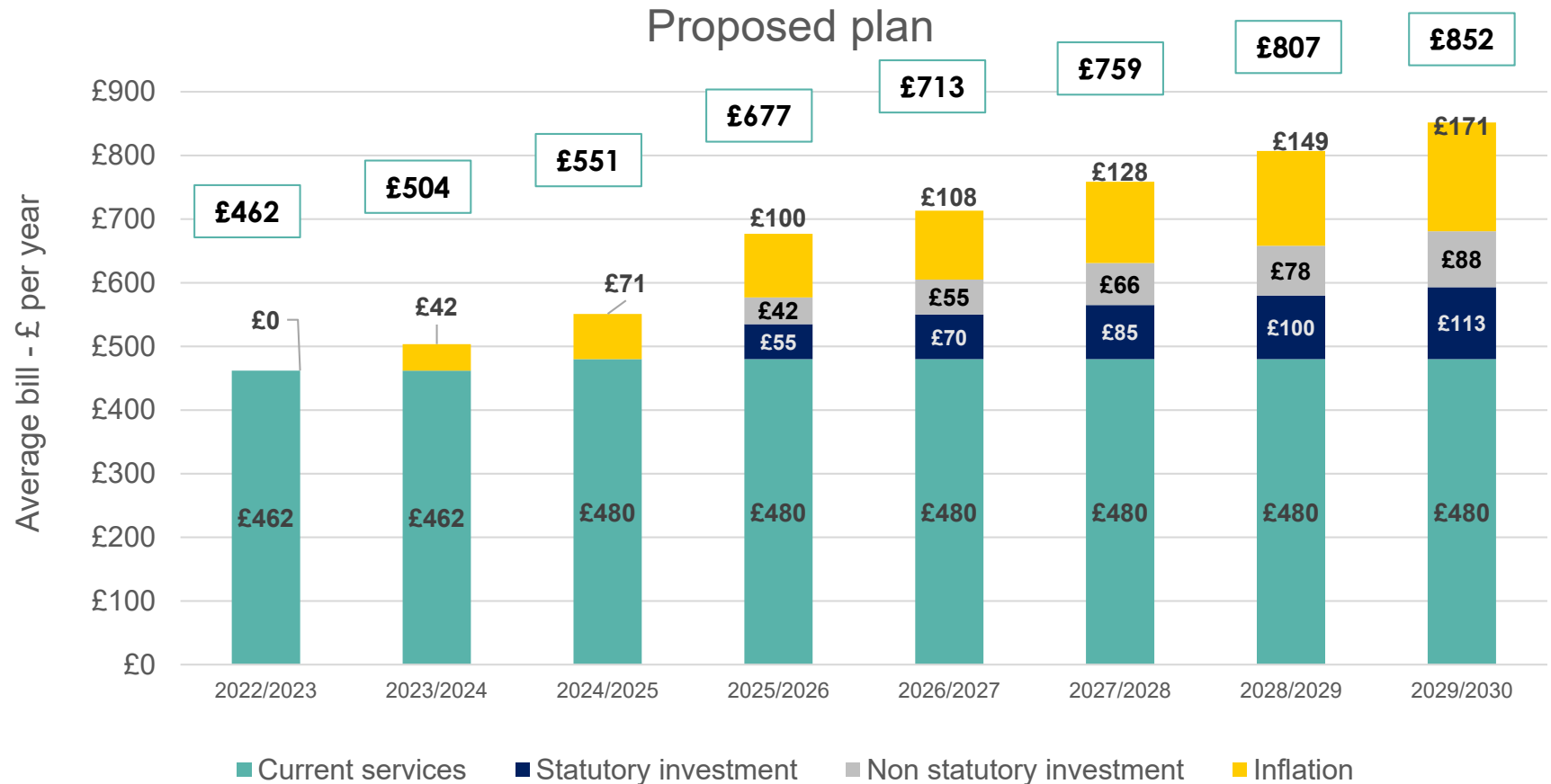
How would you like Wessex Water to pace this investment?



What would this proposed plan cost?

When you add the investment in each area, your bill will increase by, on average, £32.49 a month (£390 a year) by 2030. This includes:

- £10.26 a month of investment that regulators say we must make (statutory investment)
- £7.99 a month of investment that we want to make to maintain and improve our services to you, and
- £14.24 a month of inflation.



NB You will see a personalised bill prediction at the end of the session

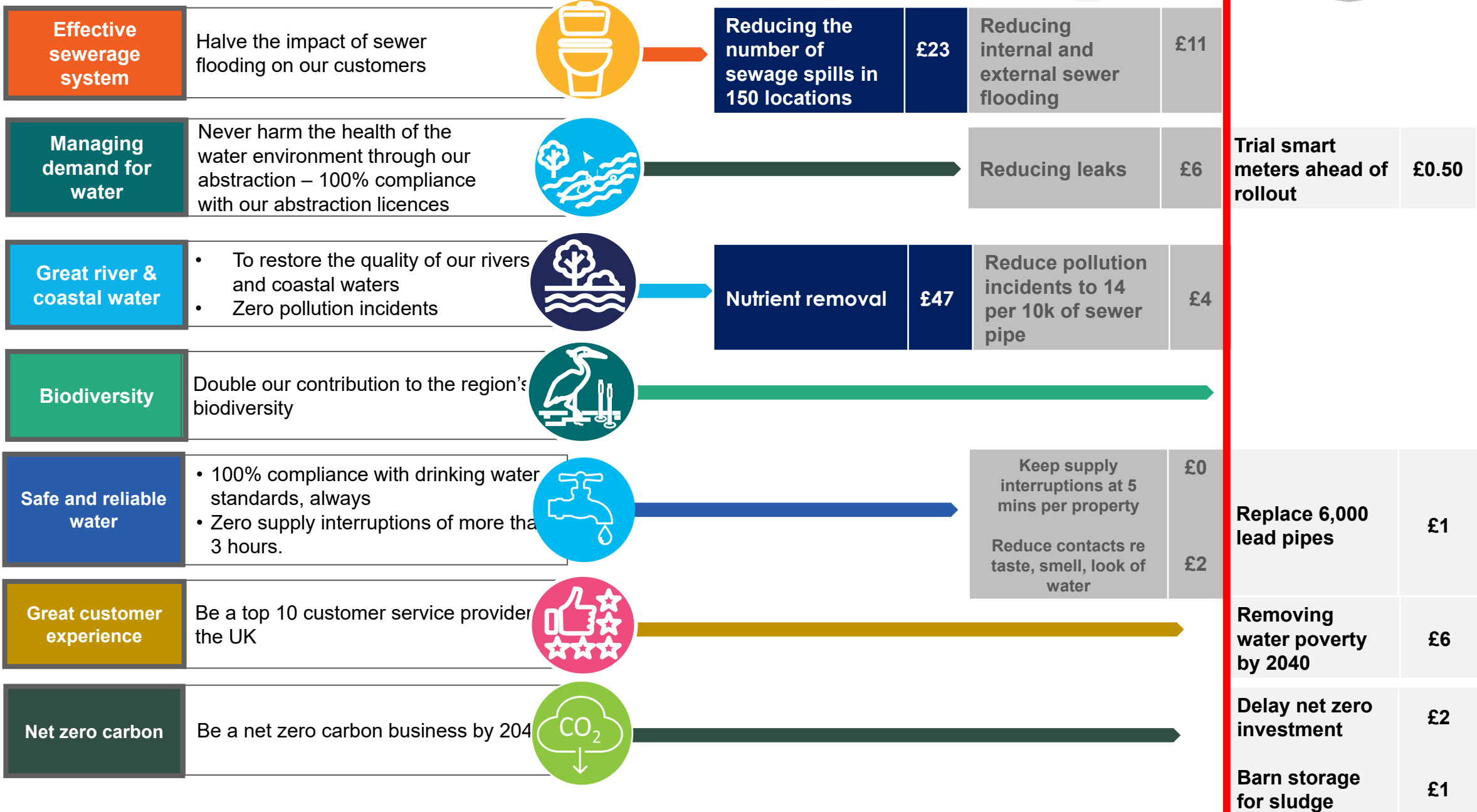
**‘Must do’
business plan**

2050 goals

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when




2050 goals


Longer term investments:
your input on how & when

There are 6 areas where Wessex Water can reduce the cost of the plan

Effective sewerage system
Halve the impact of sewer flooding on our customers




Managing demand for water
Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences




Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents




Biodiversity
Double our contribution to the region's biodiversity



Safe and reliable water


- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Great customer experience
Be a top 10 customer service provider in the UK



Net zero carbon
Be a net zero carbon business by 2040



Trial smart meters ahead of rollout £0.50

Replace 6,000 lead pipes £1

Removing water poverty by 2040 £6

Delay net zero investment £2

Barn storage for sludge £1

It can **delay smart meter rollout**. A small investment in trials could mean a more successful rollout to be complete by 2040 (not 2030)

It can reduce **lead replacement** from 12,000 pipes to 6,000 by 2030

It can achieve **eradication of water poverty by 2040** (not by 2030)

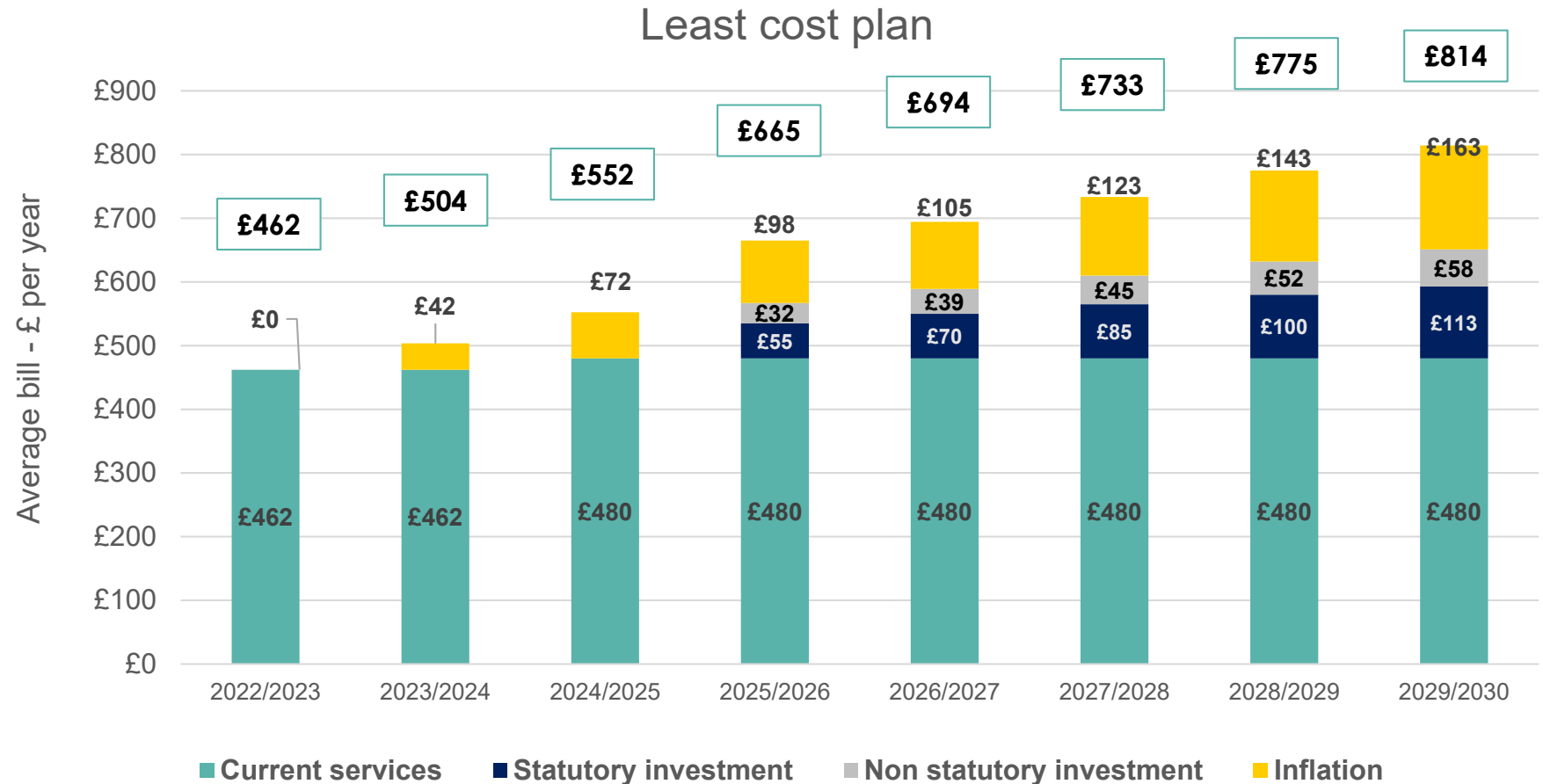
It can **delay its net zero plans** by not building the electric vehicle infrastructure or offsetting anything it cannot reduce itself. It will reach 40% net zero by 2030 instead of 100% as proposed.

It can **manage sludge** with storage barns rather than finding permanent alternatives

What would this 'must do' plan cost?

When you add the investment in each area, your bill will increase by, on average, £29.36 a month (£352 a year) by 2030. This includes:

- £10.41 a month of investment that regulators say we must make (statutory investment)
- £5.34 a month of investment that we want to make to maintain and improve our services to you, and
- £13.61 a month of inflation.



NB You will see a personalised bill prediction at the end of the session



Summarise your views in the
post-group survey.

Thank you!



BLUE MARBLE

www.bluemarbleresearch.co.uk



PART ONE

**Thank you for agreeing to participate in this important project.
The research event will involve discussing future investment plans for Wessex Water**

- Please read the following information before coming to the research event. This is designed to give you some background information to the topics we will be discussing.
- This exercise should take no longer than 20 minutes
- There are 3 sections to read: this is Part One
- **Please don't worry if you don't understand or remember the information** – it will all be recapped during the research – and there will be time for questions.
- Please complete the short survey at the end of the document at least the day before the event.

Water companies in England and Wales

There are 11 water companies that provide **both water and sewerage services**

There are also 5 companies that provide **water services only**

Some households have 2 separate suppliers:

e.g. some people in Bristol receive **water services from Bristol Water** and **sewerage services from Wessex Water**

Water companies are regional: people have to receive water services from the company that covers where they live



This is the Wessex Water region

Wessex Water provides essential services across Somerset, Wiltshire, Dorset, Bath & Bristol.

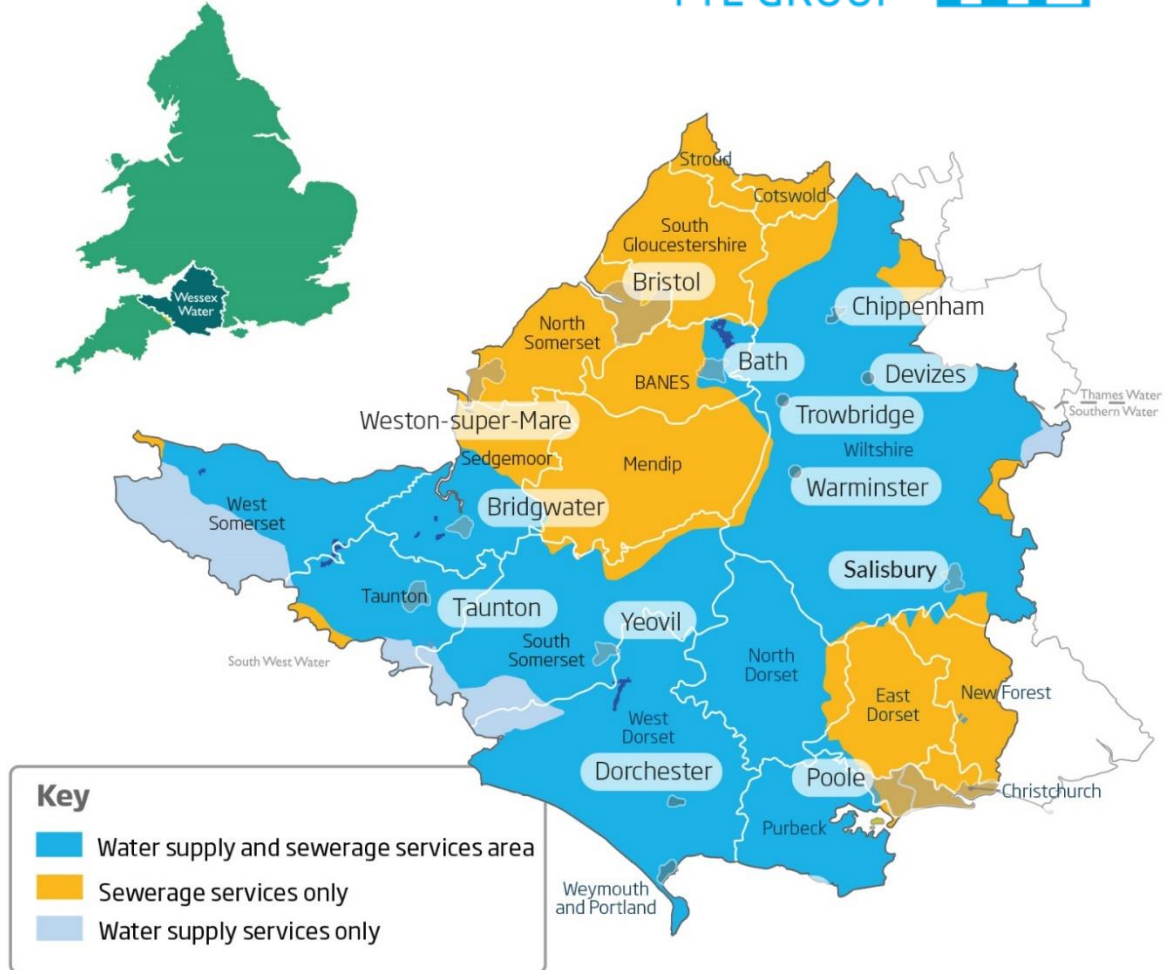
- It directly employs over 2,700 people

It provides sewerage services for the whole region:

- Approx. 2.9m people and 57,000 businesses

It provides water supply services for all areas excluding Bristol Water and Bournemouth Water areas:

- Approx. 1.4m people and 44,000 businesses



Every five years, **water companies develop a 'business plan'** that sets out how they want to develop their services, and the proposed cost to customers.

As customers are not able to choose their water company, water companies must give them a say about **what they want from their services and the price they pay.**

Talking to customers also helps water companies **prioritise what to do first or what to do most of** – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.





The business plan and prices are then **finalised by Ofwat** in a process known as the Price Review. There is more information about this here: 'All about the price review'.

Available at:

<https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are **'acceptable'** to you and whether you can **afford** the proposed bills from 2025-2030.

Companies also have to show to Ofwat that their **plans reflect what their customers want** – that means refining the plans based on what customers tell them.





Water services



Wastewater services



1.

Water is collected groundwater, reservoirs or rivers and treated



2.

Clean water supplied to customers



3.

Customers receive a safe supply of water



4.

Customers flush waste water



5.

Wastewater is collected and piped to sewage pumping stations

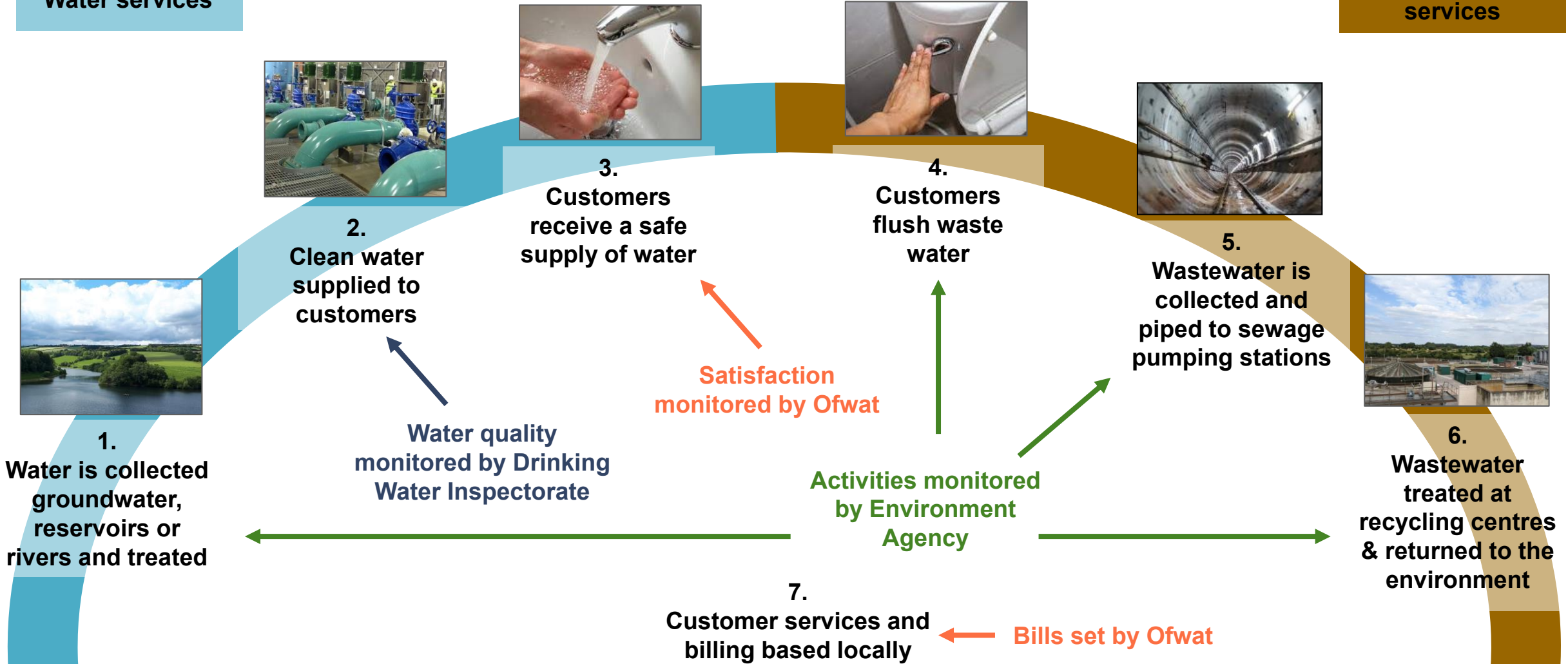


6.

Wastewater treated at recycling centres & returned to the environment

7.

Customer services and billing based locally



Water companies are currently part way through their five-year business plan for 2020 to 2025. They have **service level targets, called 'performance commitments'**, in every five-year business plan.

These **targets are based on what customers have previously told companies they would like them to do**, and on Ofwat's assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

We are now going to show you how well your water and/or sewerage company is doing on some of their performance commitments, compared to other water companies in England and Wales. These performance commitments are a snapshot of the wide range of services companies provide. We are showing these examples as customers have told us they are particularly important to them.

Water companies have to provide **reliable services**, and plan for their services to be **resilient** to changing weather patterns and demand from consumers.

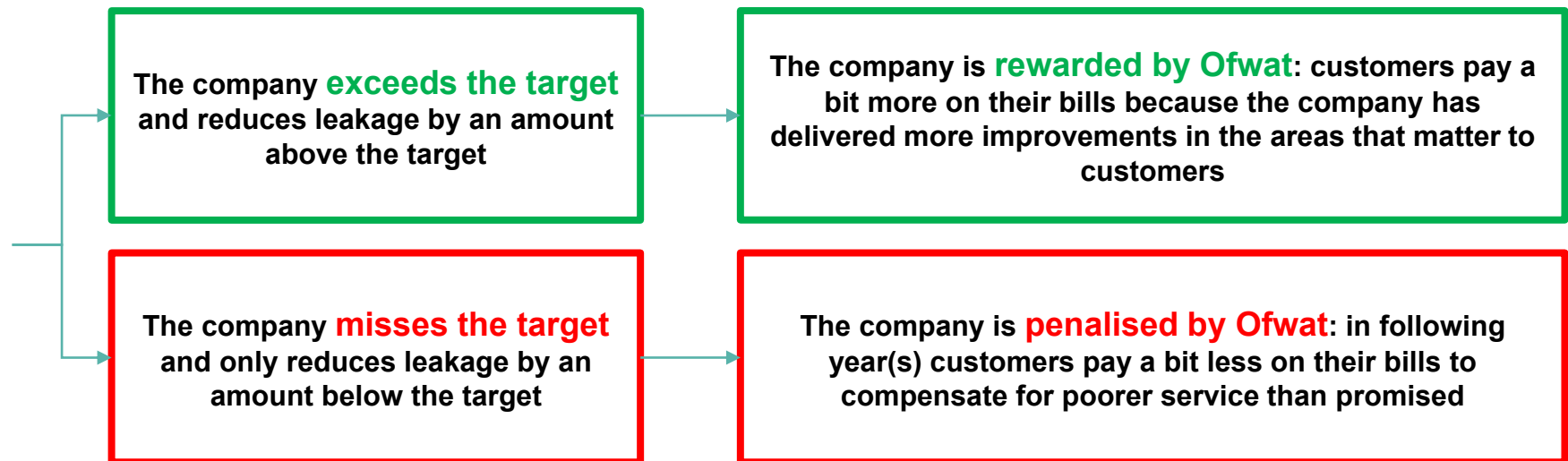
Companies can **miss** or **exceed** performance commitment targets for a number of reasons.

For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets

Example:

Water company sets a performance commitment based on customer priorities:

To reduce leakage from water mains and pipes



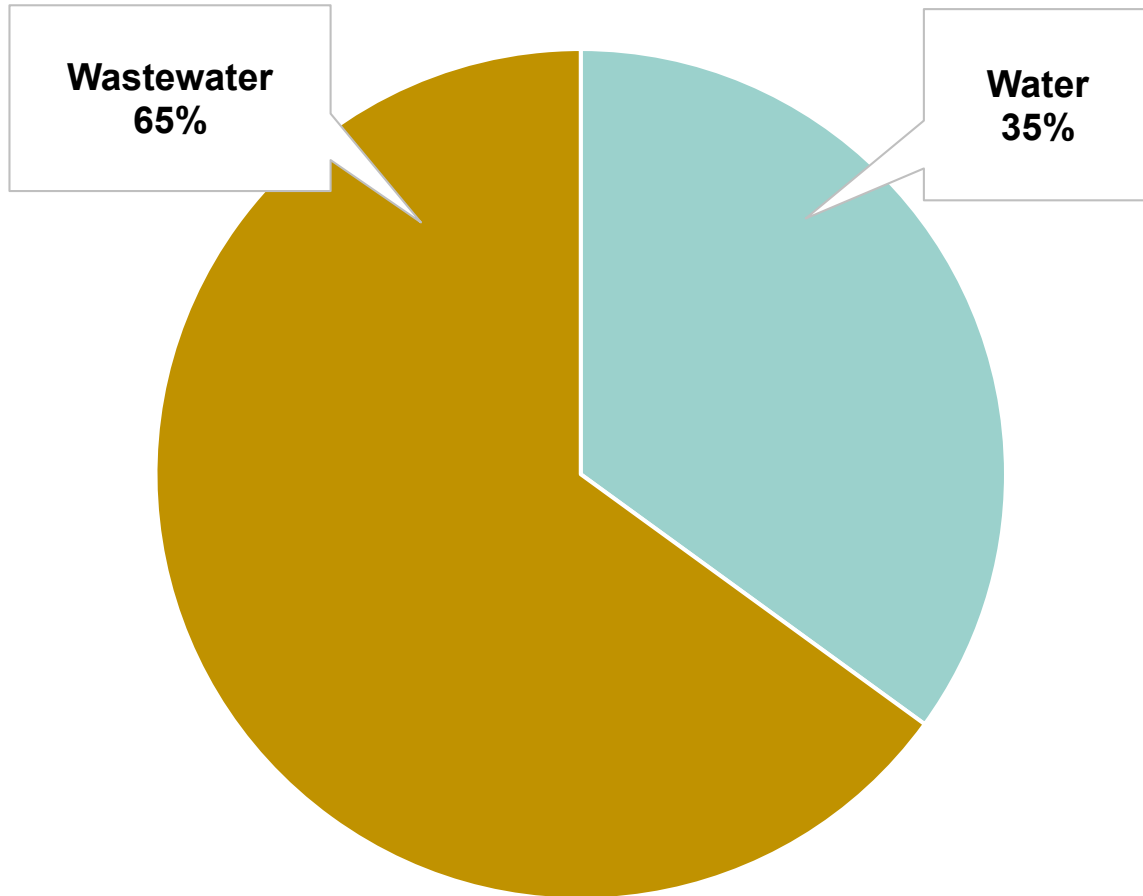


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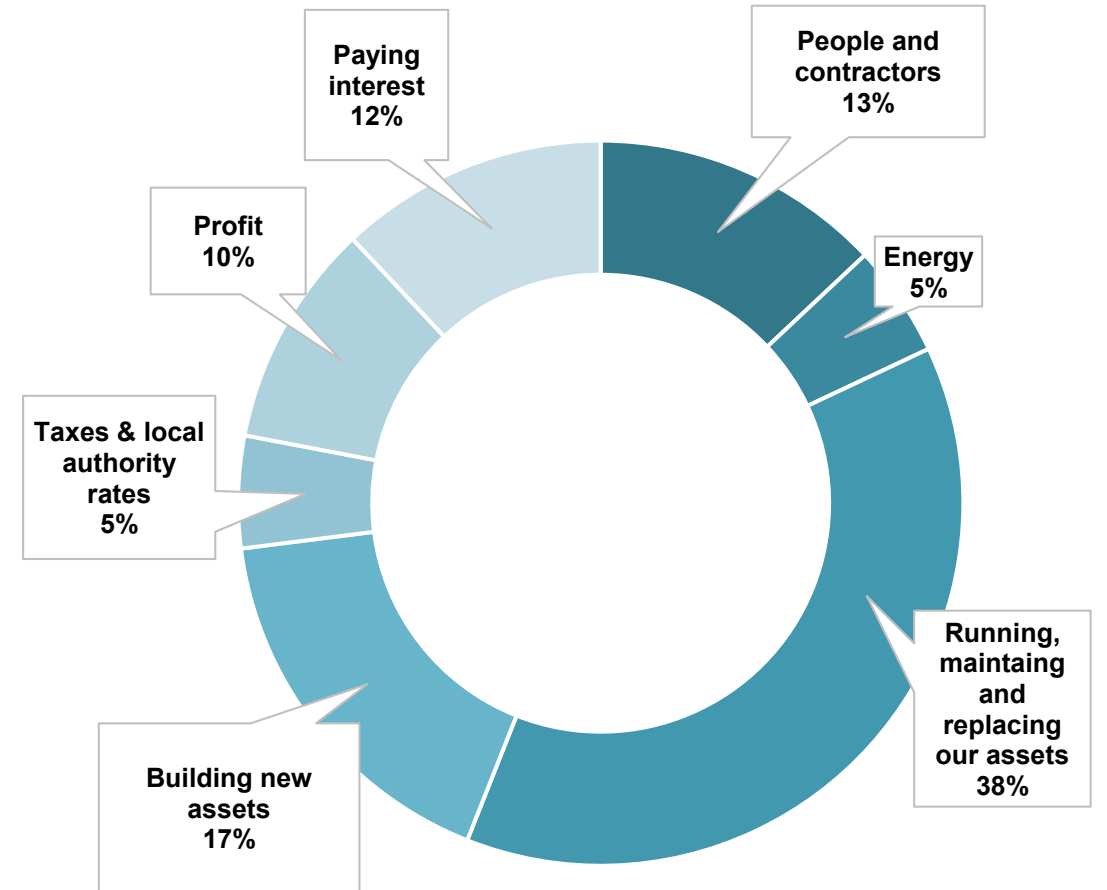
- Last year Wessex Water **passed 31** and **failed 11** performance commitment targets (with 2 neither passing or failing) earning them an overall reward of **£5.2m** that they could receive via customer bills (which would equate to £12 per household)
- However with bills already increasing it has deferred this reward so customer bills have not increased to pay for it.

Household bill breakdown

Split for every £1 spent for an average customer



How the household bill breaks down



PART TWO

Next we are showing you how Wessex Water performs in relation to other water companies across England and Wales

- The water industry uses a number of measures to assess performance. Because the water companies are very different in size and number of customers, these measures are often 'normalised' to give a fair comparison
 - For example: on the next slide you'll see information about the number of customers recorded on water companies' priority services registers.
- Please read the information and consider where you are happy with Wessex Water's performance – and where you would like to see improvements.

Priority Services is designed for customers with additional needs who may need extra help due to age, ill health, disability, mental health or a temporary change in personal situation.

Each water company, including Wessex Water, keeps a Priority Services Register and it includes customers' specific requirement(s), for example:

- People who are particularly vulnerable **during supply interruptions**.
 - *For example: people with health issues who could be at risk when there is no water e.g. dialysis , or people with mobility problems who may not be able to reach water tanks. These customers would be supplied with bottled water in the event of an interruption to supply.*
- People who need **information in a different format** than the company usually uses, for instance people who are deaf, vocally impaired, partially sighted or blind, or people with mental health problems or learning difficulties; or
- People who may need **help to read their meter, to understand their bills, or to make arrangements to pay** their bills

As we saw earlier, water companies service level targets, called ‘performance commitments’ for which they can receive penalties (when they do not achieve the target) or rewards (when they do).

The **Priority Services Performance Commitment** is one that has no financial penalties or rewards for companies, but companies are scored on how well they do just like they are on other performance commitments.

For Priority Services, the regulator tells water companies to:

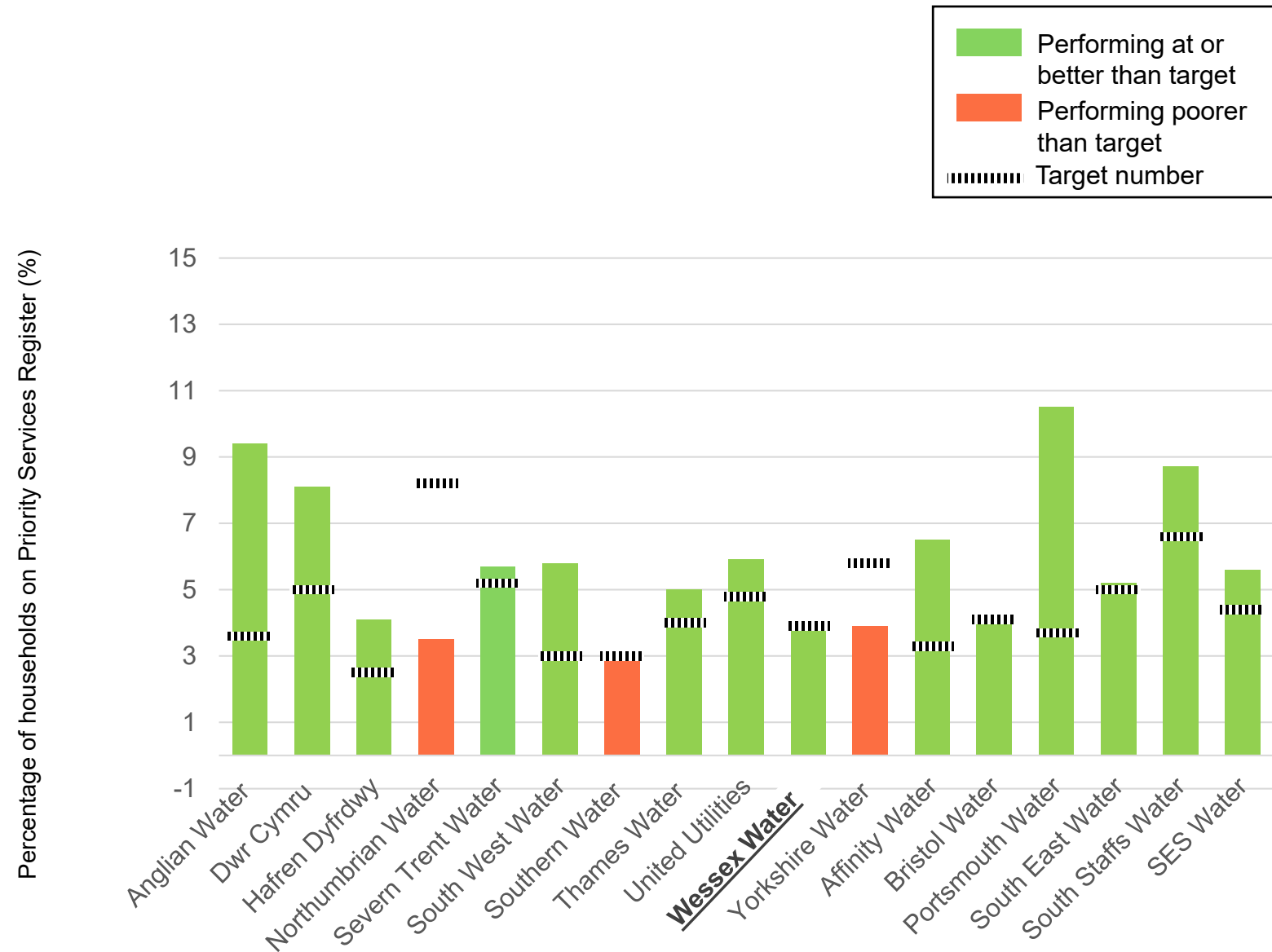
- Keep accurate and up-to-date information on consumers who need specific help or service
- Make sure all consumers are told about the specialised priority services that are available
- Make sure the application process is easy to access, to understand, and to complete
- Make sure consumers can find all the information they need in a form they can use and understand
- Make sure that bill payers who need special assistance know how much they need to pay and when they need to pay by
- Operate a password scheme to make sure that consumers can identify company staff from potential bogus callers
- Make sure all metered bill payers can check their water usage regularly
- Make sure that disabled consumers know which of the company’s public buildings and recreational facilities are equipped to cope with their needs
- Make sure that all staff are fully aware of the needs of, and services available for, disabled, chronically ill or elderly consumers

Priority services register performance in 2021-22

The table shows the percentage of households on each company's register and categorises the companies' performance on whether they have achieved all elements of the performance commitment.

Company performance against target.
(A higher percentage is better.)

Water and Sewerage company	Performance Against Target
Anglian Water	+161%
Dwr Cymru	+62%
Hafren Dyfrdwy	+64%
Northumbrian Water	-57%
Severn Trent Water	+10%
South West Water	+93%
Southern Water	-3%
Thames Water	+25%
United Utilities	+23%
Wessex Water	+3%
Yorkshire Water	-33%
Affinity Water	+97%
Bristol Water	0%
Portsmouth Water	+184%
South East Water	+4%
South Staffs Water	+32%
SES Water	+27%



Social Tariff – what is it?

All major water companies in England and Wales have schemes to give lower bills to some customers who might otherwise struggle to pay. These are called **social tariff schemes**.

- In line with Government rules these schemes are mostly funded by charging other households a bit more on their bills. This is what's also known as a **cross-subsidy**. There are a number of examples of cross subsidies in day-to-day life. For example, concessionary tickets for children or pensioners to attractions (e.g. the cinema, theme parks etc.).
- A cross-subsidy for social tariffs adds £6.50 onto the average annual bill for Wessex Water customers.

To date, Wessex Water have helped more than **55,000 households** afford their ongoing water bills or repay their debt through a variety of low-rate tariffs and payment schemes.

Some examples of Social Tariffs that Wessex Water offer include:

Reduced bill: **Assist**

Assist is for customers who are struggling to pay their bills and need a discount.

Bill cap scheme: **WaterSure**

WaterSure helps reduce water bills for households who use a lot of water for reasons beyond their control e.g. a medical condition

Discount for low income pensioners

For customers who are in receipt of Pension Credit, or where the state pension is the only source of income for all adults in the household.

Wessex Water propose to invest in the following areas in 2025-2030 to ensure bills are affordable



- Increase the **number of households on their range of affordability schemes** to at least 100,000 by 2030.
- Continue to **work with a wide range of partners** across the Wessex region, such as Citizens Advice and local charities, to raise awareness of the support they can offer and reach customers who need them most.
- Continue to **fund their debt advice partners** so they can increase the number of clients they can advise about their bills and debt.
- Make it as **easy and quick as possible to apply for the support they offer** and use data to automatically apply bill reductions to customers where they can without the need to complete an application.
- Help customers, particularly those on water meters, to **save water and energy**.
- Continue to **fund a number of local community projects** across the region through the Wessex Water Foundation aimed at improving access to services and building financial capability.

Wessex Water will continue to follow their ethos: every customer matters



In future, Wessex Water will continue to develop their goals across these 4 key themes:

Using data wisely

This helps Wessex Water to assess the effectiveness and uptake of their support and identify and target activity proactively and effectively

Growing partnerships

This area is designed to increase the number and variety of Wessex Water's partners and to work with them in a way that suits them to best engage with their clients, i.e. you – the customer

Community engagement

To extend their reach and engagement across communities, break down barriers to engagement and reach those who might otherwise not have been heard

Improving the customer journey

To make it as easy as possible for customers to know about and access support through the channel of their choice and to have an excellent customer experience

Wessex Water propose to invest in the following areas in 2025-2030 to improve customer service



Improve their customer service offer by:

- **Fixing problems faster** by using rapidly developing technology to upskill their teams.
- **Giving customers more options to contact them** and, if they want to, allowing them to book an appointment online for Wessex Water to visit them.
- **Improving communications with customers** during an event e.g. when working on a road affecting traffic.
- Continuing to **improve their online offering**, including their e-billing service
- Extending their **priority services register**



Develop their work in the community:

- Wessex Water are running two pilot projects to understand how they can **work more effectively with local communities** to deliver shared environmental and social goals
- Continuing their education programme, reaching over 20,000 students and children a year.
- Continuing to engage with customers beyond their water and sewerage bills – at community shows, through recreational access to their sites, or through the support they provide local organisations each year, financially or through their volunteering programme.

PART THREE

Finally we are showing you a headline summary of Wessex Water's proposed business plan for 2025-30.

- We will be discussing in more detail all the different elements of this plan when we meet you at the research event
- Once you've read it, please use the short (2 question) survey to note down your comments and questions
- Do remember that this research is about customers having their say on the plans before they are submitted to the regulator.

The following slide outlines Wessex Water proposed investment plan for 2025-30

There are 3 different types of investments in the plan:

Legally required investments

No say

All water companies are required to invest in new improvements **to comply with laws including new environmental legislation.**

Customers do not have a say in whether these investments go ahead.

Investments to meet 5 year performance targets

Customer feedback

All water companies are ***stipulated by regulators*** to set ambitious performance targets.

Customers do have some say in determining whether the targets are ambitious enough – or too ambitious – or too costly.

Longer term investments






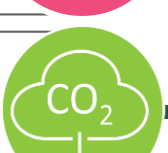
Customer input on how and when

All water companies can propose investments in addition to the minimum requirements **to help meet longer term goals.**

Customers have a large say and can give a view on what they think is the appropriate scale and pace of any additional investments.

2050 goals

Wessex Water's proposed plan for 2025-30

2050 goals		Wessex Water's proposed plan for 2025-30					
		Legally required No say	5 year targets: <i>customer feedback</i>		Longer term investments: <i>your input on how & when</i>		
Effective sewerage system	Halve the impact of sewer flooding on our customers		Reducing the number of sewage spills in 150 locations £23	Reducing internal and external sewer flooding	£11	Reduce sewage spills in further 45 locations	£11
Managing demand for water	Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences				Nutrient removal £47	Reducing leaks	£6
Great river & coastal water	<ul style="list-style-type: none"> To restore the quality of our rivers and coastal waters Zero pollution incidents 					Reduce pollution incidents to 14 per 10k of sewer pipe	£4
Safe and reliable water	<ul style="list-style-type: none"> 100% compliance with drinking water standards, always Zero supply interruptions of more than 3 hours. 					Keep supply interruptions at 5 mins per property	£0
Great customer experience	Be a top 10 customer service provider in the UK					Reduce contacts re taste, smell, look	£2
Net zero carbon & biodiversity	Be a net zero carbon business By 2040						

What will it mean for bills?

This proposed plan will have an impact on customers' bills.














The average bill will increase by **£26/month** by 2030.

This breaks down as:

- **£9** to meet the investment required by the regulators (*the blue and grey investments*)
- **£7** to meet the investments we propose over and above this (*the white investments*)
- **£10** to meet inflation

Wessex Water proposes an investment plan for 2025-30 to start to meet its long term goals.

The proposed commitments to improve on the key performance areas

			TODAY's performance	Target performance by 2030	What this will add to your bill
Supply interruptions		<i>Average time without water per household</i>	5 mins	 5 mins	£0
Water Quality		<i>Contacts per 1,000 population</i>	1.17 contacts	 1 contact	£2
Internal sewer flooding		<i>Incidents per 10,000 connections</i>	1.43 incidents	 1.04 incidents	 £11
External sewer flooding		<i>Incidents per 10,000 connections</i>	19.27 incidents	 14.5 incidents	
Leakage		<i>Number of litres lost per property per day</i>	103.29 litres	 93.02 litres	£6
Pollution		<i>Incidents per 10,000km of sewer</i>	20.6 incidents	 17.6 incidents	£4

THANK YOU FOR READING THIS INFORMATION.

PLEASE NOW ANSWER THE QUESTIONS IN THE LINK AND
SUBMIT THEM BEFORE COMING TO THE RESEARCH:

<https://forms.office.com/e/q9WwfizYM3>

This will only take around 5 minutes to complete.

(NB: if you require a paper copy please request one from BEAM)

Please have this document somewhere to hand during your research session

WE LOOK FORWARD TO CHATTING WITH YOU IN THE RESEARCH SESSIONS.



HEALTH VULNERABLE DEPTH DISCUSSION GUIDE MODERATOR GUIDE

Overview

- 60 minute depth with health vulnerable household customers

Prescribed structure for optional vulnerable in-depth interviews

The interview should cover the following. Numbers 5 and 7 are tailored for vulnerable audiences, the rest use the same approach as set out in the Appendix A (Prescribed process for deliberative discussions for household customers):

1. Welcome and introductions
2. Reactions to the pre-task
3. An introduction to the water company
4. Recap on the pre-task information
5. Explore their service needs and experiences of Priority Services and/or social tariffs
6. Temperature check - household finances/cost of living
7. Focus on the proposals in the proposed business plan for services aimed at people with health and financial vulnerabilities
8. Focus on the shorter-term picture (proposed business plan)
9. Explore views on affordability and acceptability
10. Wrap-up including the post-task

BEFORE INTERVIEW

Moderator to know the individual circumstances/vulnerability of respondent

1. Welcome and introductions (3 mins)

Moderator welcome and introduction

- Thank for participating.
- Introduce Blue Marble and explain that we are an independent research agency
- Explain: Confidentiality, GDPR, recording, how data will be used
- Objective for the discussion: to help your water company make important investment decisions.

Respondent introduction/warm-up

- Tell me a bit about you – where do you live and who lives in household?
- Circumstances: working; not working; retired etc.
- What are the biggest challenges in life at the moment?
- How do you manage these challenges?

2. Reactions to the pre-task (2 mins)

Moderator: have pre-read to hand but do not share slides on screen (just glean what matters, what has struck them)

Response to the pre-read

We provided you with some pre-read information to look through before attending this session. We're going to cover some of the topics in depth in due course, but I want to get your first thoughts:

- What surprised you most out of the things you have read?
- Has any of the information you have seen changed your opinion of your water company in any way? If so, in what ways?
- What would you most like to find out more about?
- Is there anything in the material you read which was difficult to understand?



- Which bits?

3. An introduction to the water company (5 mins)

Moderator: not screen sharing / have pre-read to hand

Introduction to the water company Refer to pre-task slides

- Awareness and experience of the water company
 - How much of this is new information for you?
 - What contact do you have with your water company?
 - What associations do you have with your water company?
- Understanding the role of water companies
 - Were there any surprises in terms of what they do as a business?
 - Check awareness of dual providers if relevant e.g.
 - Were you aware that [as appropriate]:
 - your water company provides both your water services and your sewerage services?
 - You have 2 providers - one for water and one for waste?
 - Are your bills for both services separate or combined?

4. Recap on the pre-task information (5 mins)

Moderator: not screen sharing / have pre-read to hand

- Thinking about all the water and wastewater services that your water company provides for you and thinking about your bills:
 - What do you think of the value for money of the service you receive?
 - If so, in what ways are they providing good value?
 - If not, in what ways are they providing poor value?

5. Temperature check – household finances and the cost of living (5 mins)

We're now going to talk about finances and the cost of living.

- How has the cost of living crisis impacted you and your household?
 - How about other people you know?
- Do you feel that things are worsening/improving/remaining stable?
 - If not improving, when do you anticipate the financial situation will start to improve?
- How are you feeling about the financial situation looking into the future:
 - In the next 5 years?
 - In the next 10 years?

6. Service needs & experience of Priority Services and/or social tariffs (5 mins)

I'd now like to talk a bit about your health condition and the services you receive from your water company. From the information you provided, I understand that you have a health condition. Could you please tell me about this and how it affects your day-to-day life?

- How, if at all, does it affect the way you use water?
- How, if at all, does it affect how you communicate or engage with your water company?
- And do you know whether you are on the Priority Services Register at all?

[IF ON PSR]



- What specific services or assistance, if any, do you receive from your water company as a result of being on the Priority Services Register?

Where appropriate probe whether they receive different priority services:

- Accessible bills or literature (large print, disc, braille communications, read-out bills, text relay, alternative language documents)
- Advanced warnings of supply interruptions;
- Password if water company employee needs to call at individuals property / identity check to ensure person at door is genuine water company employee.
- Nominated contact – relative, friend, or carer to be contacted about bill or water emergency.
- Help with reading water meter.
- Emergency water supply - if have no water and cannot get to a collection point or need it for medical reasons.

[FOR EACH PRIORITY SERVICE THEY RECEIVE]

- What are your impressions of this service?
- How, if at all, are they helpful or unhelpful?
- What, if anything, could be improved about the service you receive?
- What additional specific services or assistance, if any, would you like to receive from your water company?

[IF NOT ON PSR OR UNSURE]

- What support, if any, do you receive when it comes to communicating or engaging with your water company?
- Who provides this support? (probe: family, friends, carer, charities etc.)
- How, if at all, does this help?
- What other support would you like?
- What specific services or assistance, if any, would you like to receive from your **water company** to help with the issues you mentioned related to your health condition?

And do you know if you are on a social tariff at all? (if necessary: this is a specific tariff that reduces customers' water bills. It is offered by water companies to customers that struggle to afford their bills.)

[IF ON SOCIAL TARIFF]

- What are your impressions of your water company's social tariff?
- How, if at all, is it helpful or unhelpful?
- What additional financial support, if any, would you like to receive from your water company?

[IF NOT ON SOCIAL TARIFF OR NOT SURE]

- What financial support, if any, would you like to see from your water company?
- Why?

7. Focus on the proposals in the proposed business plan for services aimed at people with health and financial vulnerabilities (15 mins)

I'd like to talk a bit more about the Priority Services Register and what your water company is planning as part of its plans

SHOW PSR SLIDES FROM PRE-READ

- What do you think about the work they are doing relating to supporting customers on the PSR register?
- Identify whether, and if so how this part of their service could be improved
- Overall, how acceptable do you find their proposed activities?
- How do you feel about their performance in this area (show performance slide)

SHOW ST and AFFORDABILITY SLIDES FROM PRE-READ

ST slide

- What do you think about the work they are doing relating to supporting customers who are struggling financially?
- Identify whether, and if so how this part of their service could be improved

Affordability slide

- How do you feel about the proposed plans to expand affordability services
 - Do they feel too ambitious/not ambitious enough/about right?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?
- Overall, how acceptable do you find their proposed activities and performance?

SHOW VULNERABILITY STRATEGY SLIDES FROM PRE-READ

- What do you think about the work they are doing relating to supporting customers who are living in vulnerable circumstances?
- Identify whether, and if so how this part of their service could be improved
- Overall, how acceptable do you find their proposed activities to improve customer service between now and 2030?

8. Response to 1-page business plan (5 mins)

Moderator: share screen – plan on a page

*NB Moderators to have the deliberative event pack to hand to answer any specific questions
If necessary explain that we are particularly interested on their views on the particular aspects of the plan covered already and we haven't got the time to talk about everything they are proposing.*

I'd now like to talk a bit about the overall plan that was in the pre-read pack. These are just proposals at this stage – but they show all the different investments the water company needs or wants to make.

Recap that some elements are required by law; some elements have performance targets attached to them; other parts have greater discretion where customer preferences will impact what the final plan is.

- Tell me what you thought of the overall plan overall?

We will talk about the cost of the plan in a little while...but for now what are your thoughts on the types of investments they've headlined here?

- Did any investments interest you particularly? Why?



BLUE MARBLE

- Do any of these areas of investment have particular relevance to you and your household? Why is that?
- Are there any that you are unhappy about – or find unacceptable? Why is that?

Affordability and Acceptability – 5 minutes

Moderator: keep sharing screen – plan on a page. Highlighting the green panel (overall bill impact)

- Overall, how affordable do you think the proposed plans are?
- Response to the individual investment bill impacts over the 2025-30 period – any that are surprising or confusing?
- How are you feeling about the plan?
- How are you feeling about your water company?

Wrap up and post-task – 10 minutes

Thank you very much for all of your input so far. We really appreciate your time and engagement. To round things up, we'd like you to complete a short questionnaire about some of the things we have discussed today – and specifically about how the proposed business plan could affect your bill.

Assist with survey as appropriate.

PART ONE

**Thank you for agreeing to participate in this important project.
The research event will involve discussing future investment plans for Wessex Water**

- Please read the following information before coming to the research event. This is designed to give you some background information to the topics we will be discussing.
- This exercise should take no longer than 20 minutes
- There are 3 sections to read: this is Part One
- **Please don't worry if you don't understand or remember the information** – it will all be recapped during the research – and there will be time for questions.
- Please complete the short survey at the end of the document at least the day before the event.

Water companies in England and Wales

There are 11 water companies that provide **both water and sewerage services**

There are also 5 companies that provide **water services only**

Some households have 2 separate suppliers:

e.g. some people in Bristol receive **water services from Bristol Water** and **sewerage services from Wessex Water**

Water companies are regional: people have to receive water services from the company that covers where they live



This is the Wessex Water region

Wessex Water provides essential services across Somerset, Wiltshire, Dorset, Bath & Bristol.

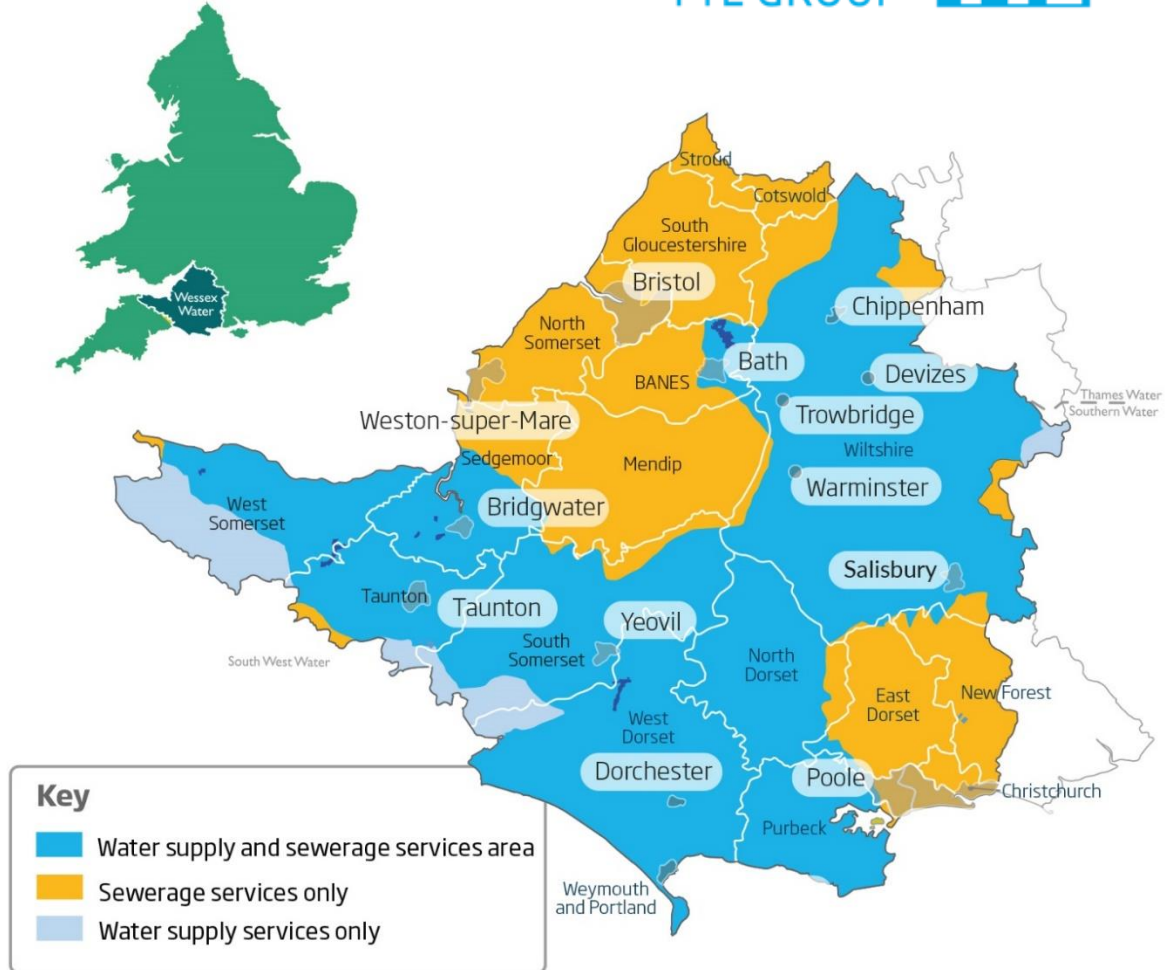
- It directly employs over 2,700 people

It provides sewerage services for the whole region:

- Approx. 2.9m people and 57,000 businesses

It provides water supply services for all areas excluding Bristol Water and Bournemouth Water areas:

- Approx. 1.4m people and 44,000 businesses



Every five years, **water companies develop a 'business plan'** that sets out how they want to develop their services, and the proposed cost to customers.

As customers are not able to choose their water company, water companies must give them a say about **what they want from their services and the price they pay.**

Talking to customers also helps water companies **prioritise what to do first or what to do most of** – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.





The business plan and prices are then **finalised by Ofwat** in a process known as the Price Review. There is more information about this here: 'All about the price review'.

Available at:

<https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are **'acceptable'** to you and whether you can **afford** the proposed bills from 2025-2030.

Companies also have to show to Ofwat that their **plans reflect what their customers want** – that means refining the plans based on what customers tell them.





Water services



Wastewater services



1.

Water is collected groundwater, reservoirs or rivers and treated



2.

Clean water supplied to customers



3.

Customers receive a safe supply of water



4.

Customers flush waste water



5.

Wastewater is collected and piped to sewage pumping stations

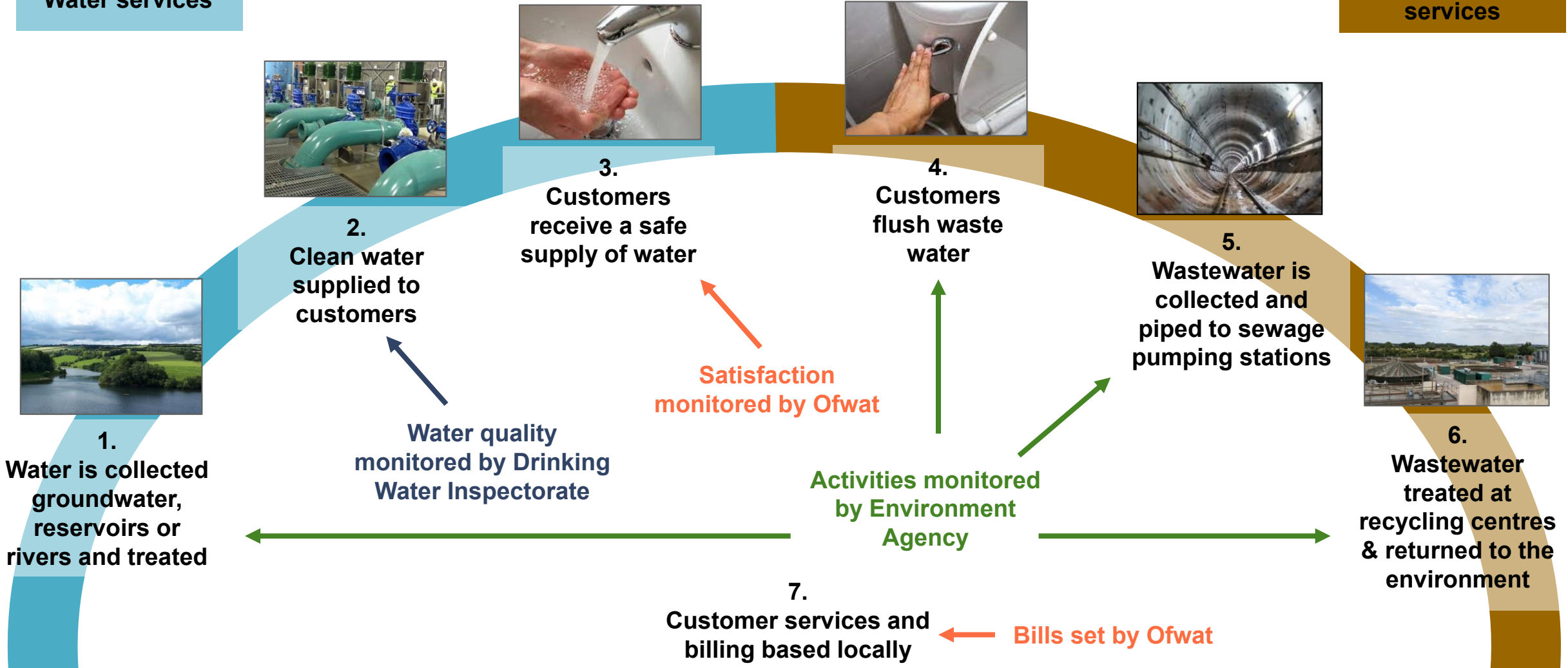


6.

Wastewater treated at recycling centres & returned to the environment

7.

Customer services and billing based locally



Water companies are currently part way through their five-year business plan for 2020 to 2025. They have **service level targets, called 'performance commitments'**, in every five-year business plan.

These **targets are based on what customers have previously told companies they would like them to do**, and on Ofwat's assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

We are now going to show you how well your water and/or sewerage company is doing on some of their performance commitments, compared to other water companies in England and Wales. These performance commitments are a snapshot of the wide range of services companies provide. We are showing these examples as customers have told us they are particularly important to them.

Water companies have to provide **reliable services**, and plan for their services to be **resilient** to changing weather patterns and demand from consumers.

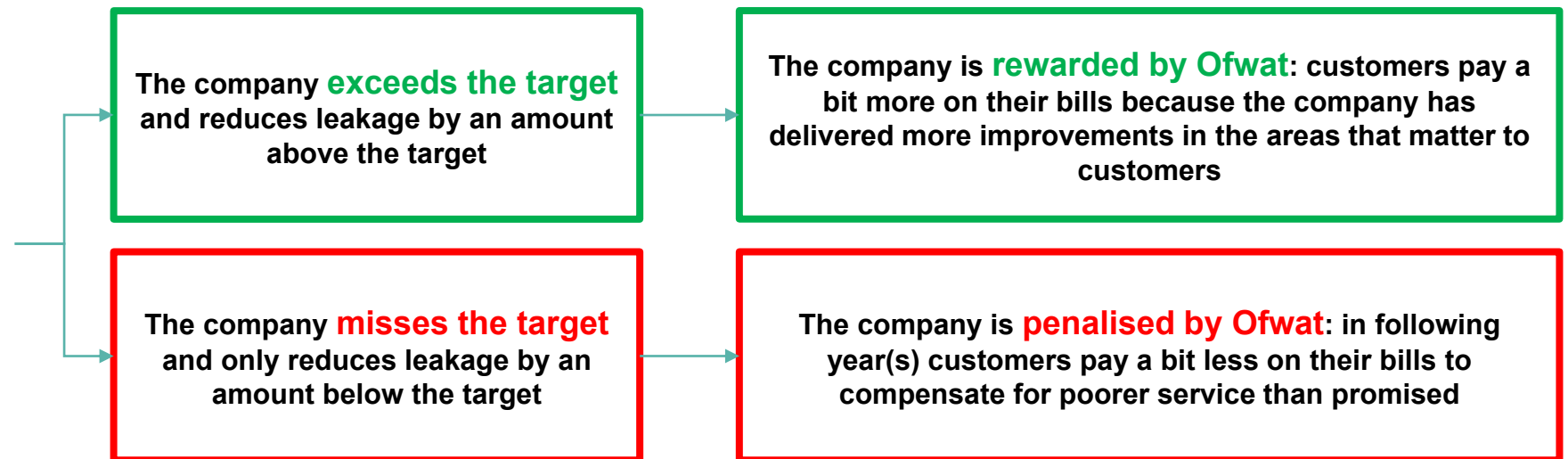
Companies can **miss** or **exceed** performance commitment targets for a number of reasons.

For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets

Example:

Water company sets a performance commitment based on customer priorities:

To reduce leakage from water mains and pipes



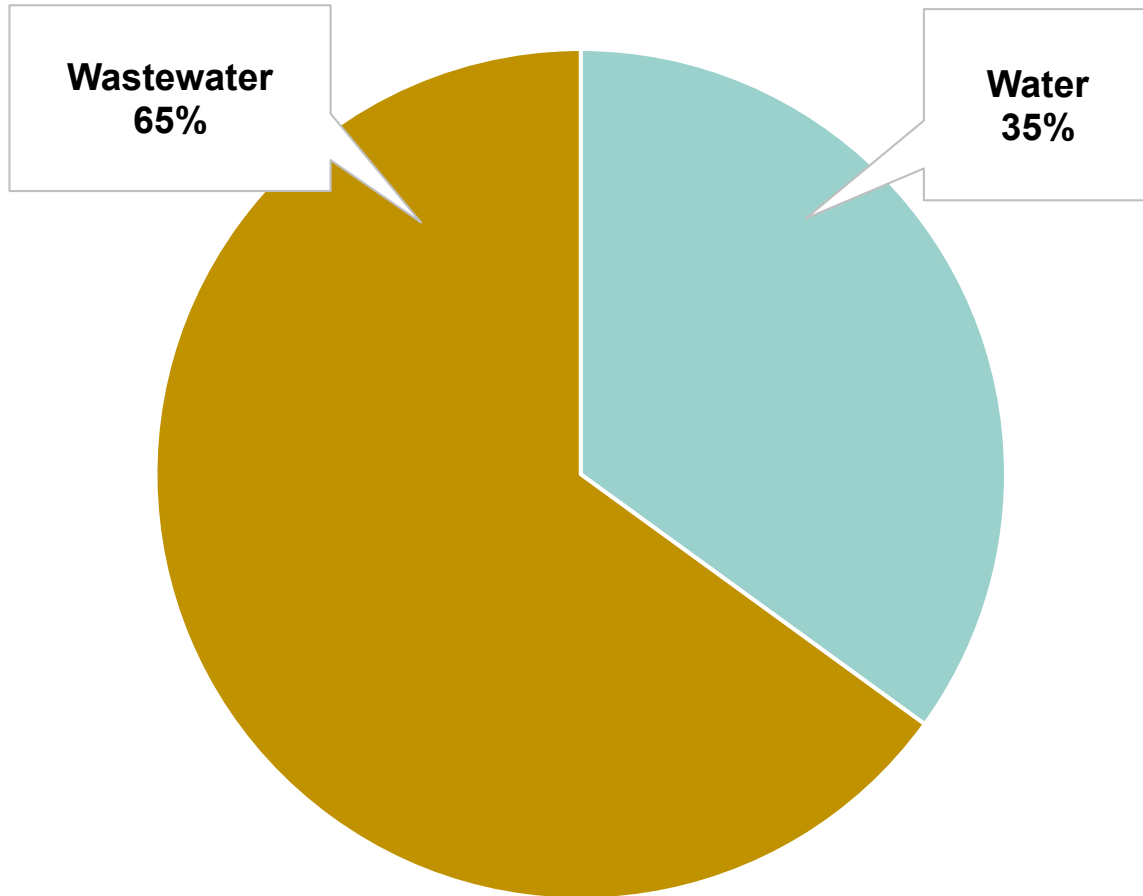


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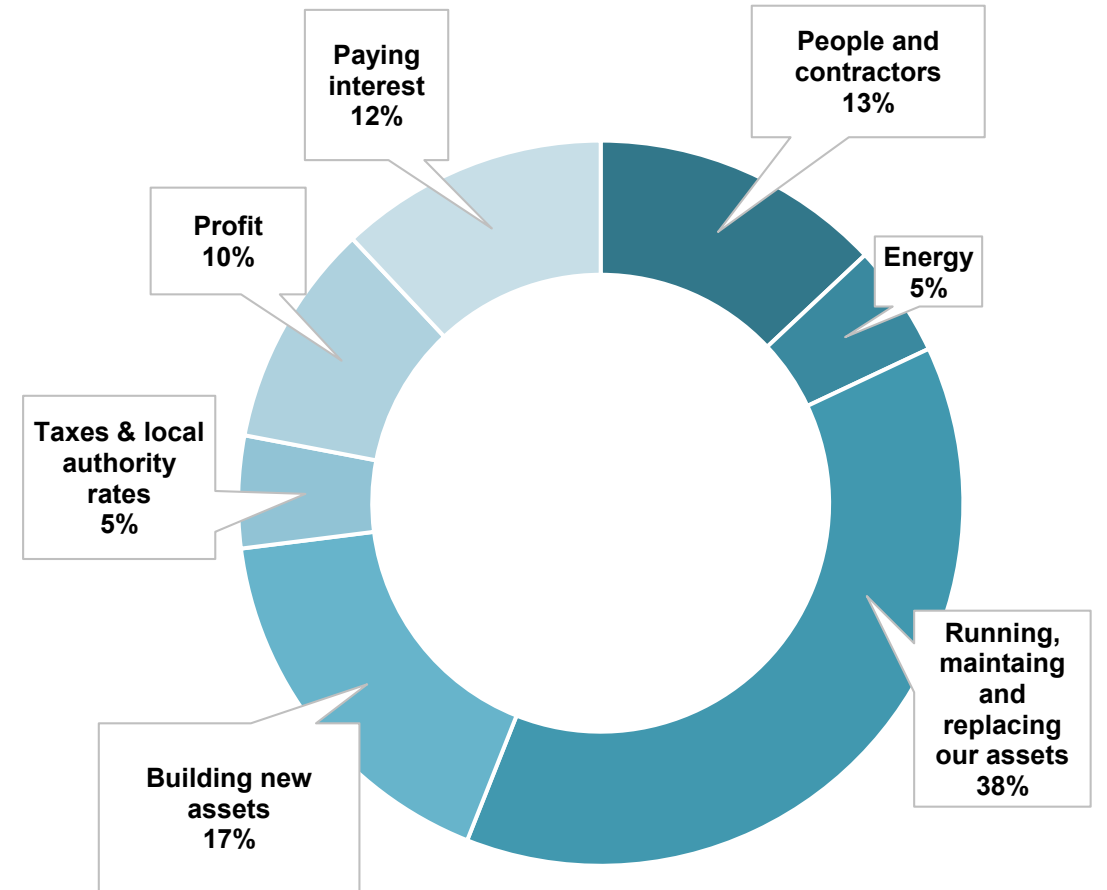
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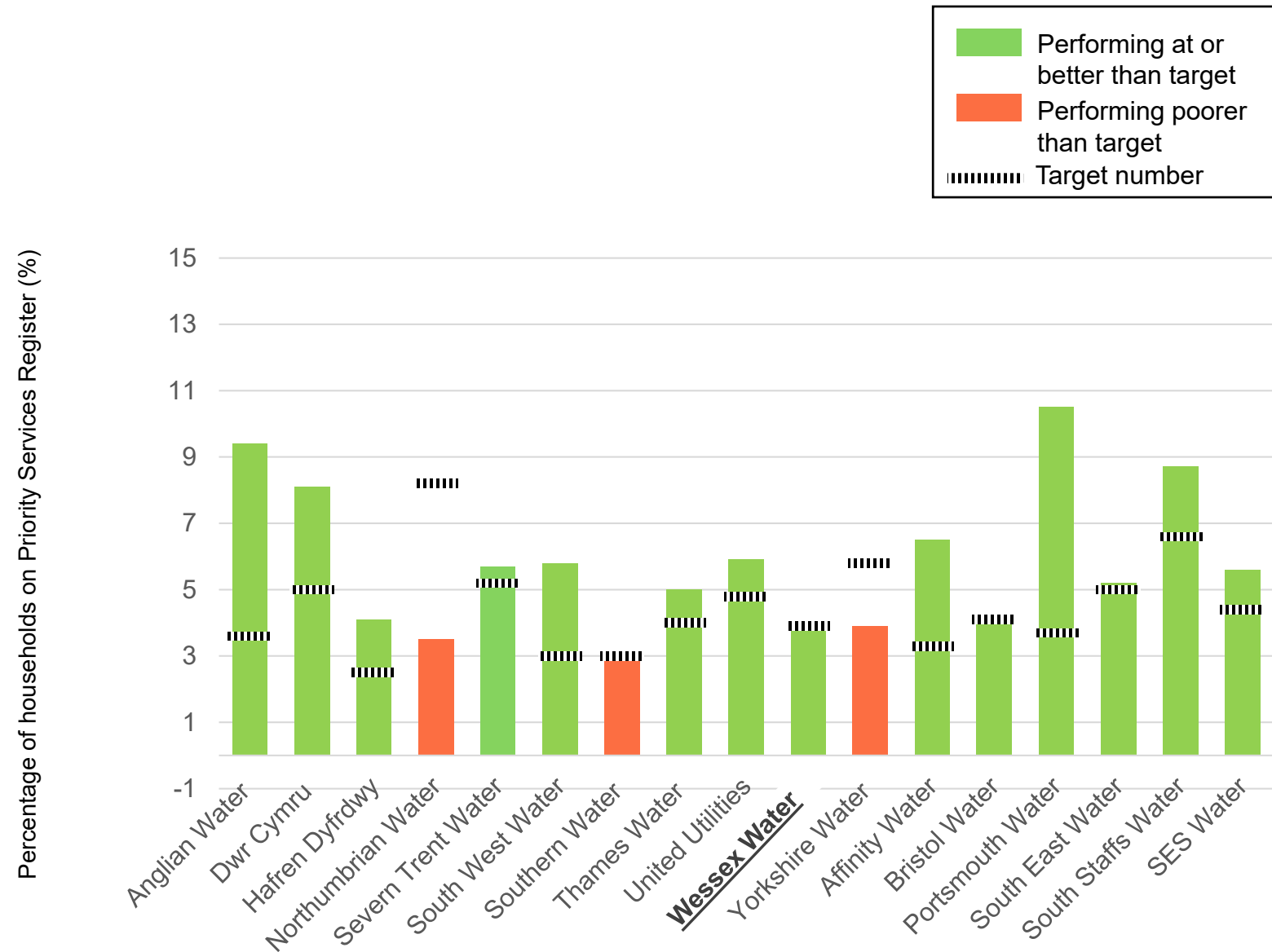
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- Make sure consumers can find all the information they need in a form they can use and understand
- Make sure that bill payers who need special assistance know how much they need to pay and when they need to pay by
- Operate a password scheme to make sure that consumers can identify company staff from potential bogus callers
- Make sure all metered bill payers can check their water usage regularly
- Make sure that disabled consumers know which of the company’s public buildings and recreational facilities are equipped to cope with their needs
- Make sure that all staff are fully aware of the needs of, and services available for, disabled, chronically ill or elderly consumers

Priority services register performance in 2021-22

The table shows the percentage of households on each company's register and categorises the companies' performance on whether they have achieved all elements of the performance commitment.

Company performance against target.
(A higher percentage is better.)

Water and Sewerage company	Performance Against Target
Anglian Water	+161%
Dwr Cymru	+62%
Hafren Dyfrdwy	+64%
Northumbrian Water	-57%
Severn Trent Water	+10%
South West Water	+93%
Southern Water	-3%
Thames Water	+25%
United Utilities	+23%
Wessex Water	+3%
Yorkshire Water	-33%
Affinity Water	+97%
Bristol Water	0%
Portsmouth Water	+184%
South East Water	+4%
South Staffs Water	+32%
SES Water	+27%



Social Tariff – what is it?

All major water companies in England and Wales have schemes to give lower bills to some customers who might otherwise struggle to pay. These are called **social tariff schemes**.

- In line with Government rules these schemes are mostly funded by charging other households a bit more on their bills. This is what's also known as a **cross-subsidy**. There are a number of examples of cross subsidies in day-to-day life. For example, concessionary tickets for children or pensioners to attractions (e.g. the cinema, theme parks etc.).
- A cross-subsidy for social tariffs adds £6.50 onto the average annual bill for Wessex Water customers.

To date, Wessex Water have helped more than **55,000 households** afford their ongoing water bills or repay their debt through a variety of low-rate tariffs and payment schemes.

Some examples of Social Tariffs that Wessex Water offer include:

Reduced bill: **Assist**

Assist is for customers who are struggling to pay their bills and need a discount.

Bill cap scheme: **WaterSure**

WaterSure helps reduce water bills for households who use a lot of water for reasons beyond their control e.g. a medical condition

Discount for low income pensioners

For customers who are in receipt of Pension Credit, or where the state pension is the only source of income for all adults in the household.

Wessex Water propose to invest in the following areas in 2025-2030 to ensure bills are affordable



- Increase the **number of households on their range of affordability schemes** to at least 100,000 by 2030.
- Continue to **work with a wide range of partners** across the Wessex region, such as Citizens Advice and local charities, to raise awareness of the support they can offer and reach customers who need them most.
- Continue to **fund their debt advice partners** so they can increase the number of clients they can advise about their bills and debt.
- Make it as **easy and quick as possible to apply for the support they offer** and use data to automatically apply bill reductions to customers where they can without the need to complete an application.
- Help customers, particularly those on water meters, to **save water and energy**.
- Continue to **fund a number of local community projects** across the region through the Wessex Water Foundation aimed at improving access to services and building financial capability.

Wessex Water will continue to follow their ethos: every customer matters



In future, Wessex Water will continue to develop their goals across these 4 key themes:

Using data wisely

This helps Wessex Water to assess the effectiveness and uptake of their support and identify and target activity proactively and effectively

Growing partnerships

This area is designed to increase the number and variety of Wessex Water's partners and to work with them in a way that suits them to best engage with their clients, i.e. you – the customer

Community engagement

To extend their reach and engagement across communities, break down barriers to engagement and reach those who might otherwise not have been heard

Improving the customer journey

To make it as easy as possible for customers to know about and access support through the channel of their choice and to have an excellent customer experience

Wessex Water propose to invest in the following areas in 2025-2030 to improve customer service



Improve their customer service offer by:

- **Fixing problems faster** by using rapidly developing technology to upskill their teams.
- **Giving customers more options to contact them** and, if they want to, allowing them to book an appointment online for Wessex Water to visit them.
- **Improving communications with customers** during an event e.g. when working on a road affecting traffic.
- Continuing to **improve their online offering**, including their e-billing service
- Extending their **priority services register**



Develop their work in the community:

- Wessex Water are running two pilot projects to understand how they can **work more effectively with local communities** to deliver shared environmental and social goals
- Continuing their education programme, reaching over 20,000 students and children a year.
- Continuing to engage with customers beyond their water and sewerage bills – at community shows, through recreational access to their sites, or through the support they provide local organisations each year, financially or through their volunteering programme.

PART THREE

Finally we are showing you a headline summary of Wessex Water's proposed business plan for 2025-30.

- We will be discussing in more detail all the different elements of this plan when we meet you at the research event
- Once you've read it, please use the short (2 question) survey to note down your comments and questions
- Do remember that this research is about customers having their say on the plans before they are submitted to the regulator.

The following slide outlines Wessex Water proposed investment plan for 2025-30

There are 3 different types of investments in the plan:

Legally required investments

No say

All water companies are required to invest in new improvements **to comply with laws including new environmental legislation.**

Customers do not have a say in whether these investments go ahead.

Investments to meet 5 year performance targets

Customer feedback

All water companies are ***stipulated by regulators*** to set ambitious performance targets.

Customers do have some say in determining whether the targets are ambitious enough – or too ambitious – or too costly.

Longer term investments

Customer input on how and when

All water companies can propose investments in addition to the minimum requirements **to help meet longer term goals.**

Customers have a large say and can give a view on what they think is the appropriate scale and pace of any additional investments.

2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system

Halve the impact of sewer flooding on our customers



Reducing the number of sewage spills in 150 locations

£23

Reducing internal and external sewer flooding

£11

Reduce sewage spills in further 45 locations

£11

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Reducing leaks

£6

Install smart meters in 90% of all properties

£15

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Nutrient removal

£47

Reduce pollution incidents to 14 per 10k of sewer pipe

£4

Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Keep supply interruptions at 5 mins per property

£0

Reduce contacts re taste, smell, look

£2

Replace 12,000 lead pipes

£2

Great customer experience

Be a top 10 customer service provider in the UK

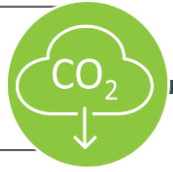


Removing everyone from water poverty

£24

Net zero carbon & biodiversity

Be a net zero carbon business By 2040



Reduce carbon & pollutants from sewer sludge

£8

Operationally net zero

£6

What will it mean for bills?

This proposed plan will have an impact on customers' bills.













The average bill will increase by £26/month by 2030.

This breaks down as:

- £9 to meet the investment required by the regulators (*the blue and grey investments*)
- £7 to meet the investments we propose over and above this (*the white investments*)
- £10 to meet inflation

Wessex Water proposes an investment plan for 2025-30 to start to meet its long term goals.

The proposed commitments to improve on the key performance areas

			TODAY's performance	Target performance by 2030	What this will add to your bill
Supply interruptions		<i>Average time without water per household</i>	5 mins	 5 mins	£0
Water Quality		<i>Contacts per 1,000 population</i>	1.17 contacts	 1 contact	£2
Internal sewer flooding		<i>Incidents per 10,000 connections</i>	1.43 incidents	 1.04 incidents	 £11
External sewer flooding		<i>Incidents per 10,000 connections</i>	19.27 incidents	 14.5 incidents	
Leakage		<i>Number of litres lost per property per day</i>	103.29 litres	 93.02 litres	£6
Pollution		<i>Incidents per 10,000km of sewer</i>	20.6 incidents	 17.6 incidents	£4

THANK YOU FOR READING THIS INFORMATION.

PLEASE NOW ANSWER THE QUESTIONS IN THE LINK AND
SUBMIT THEM BEFORE COMING TO THE RESEARCH:

<https://forms.office.com/e/q9WwfizYM3>

This will only take around 5 minutes to complete.

(NB: if you require a paper copy please request one from BEAM)

Please have this document somewhere to hand during your research session

WE LOOK FORWARD TO CHATTING WITH YOU IN THE RESEARCH SESSIONS.

Overview of the NHH sample

		Wessex	Bristol	Bournemouth
Reconvened online groups with MICRO NHH (i and ii) – 1.5 hours + 1.5 hours				
Free find		3 groups of 6 NHH (18 in total)	2 groups of 6 NHH (12 in total)	1 group of 6 NHH (6 in total)
List 'opt ins'		-	-	-
Online depths with larger NHH up to 1 hour				
Free find		8	4	4
List 'opt ins'		-	-	-

- **16 x 1hr depths with larger NHH**
 - **8 x Wessex, 4 x Bristol, 4 x Bournemouth**
 - w/c 1st May
- **6 x 90 minute reconvened online groups with MICRO NHH customers (6 per group)**
 - **3 x Wessex, 2 x Bristol, 1 x Bournemouth**
 - **1st round** – w/c 8th May
 - **2nd round** – w/c 15th May

Timetable for NHH groups:

	Wessex			Bristol		Bournemouth
w/c 8th May	NHH Group 1 Tues 9 th May 5-6:30pm	NHH Group 2 Tues 9 th May 7-8:30pm	NHH Group 3 Weds 10 th May 5-6:30pm	NHH Group 1 Tues 9 th May 5-6:30pm	NHH Group 2 Weds 10 th May 5-6:30pm	NHH Group 1 Thurs 11 th May 5-6:30pm
w/c 15th May	NHH Group 1 Tues 16 th May 5-6:30pm	NHH Group 2 Tues 16 th May 7-8:30pm	NHH Group 3 Weds 17 th May 5-6:30pm	NHH Group 1 Tues 16 th May 5-6:30pm	NHH Group 2 Weds 17 th May 5-6:30pm	NHH Group 1 Thurs 18 th May 5-6:30pm

	Quotas across sample	Other characteristics
D MICRO NHH (Under 10 employees) FREE FIND recruited using commercial and recruiter databases	Representing 4 quartiles of water use and volume (spend) <ul style="list-style-type: none"> • Domestic use – low spend • Domestic use – high spend • Non domestic use – low spend • Non domestic use – high spend 	<ul style="list-style-type: none"> • Spread of sector • Range of locations

	Quotas across sample	Other characteristics

<p>E LARGER NHH (10+ employees) FREE FIND recruited using commercial and recruiter databases</p>	<p>Representing 4 quartiles of water use and volume (spend)</p> <ul style="list-style-type: none"> • Domestic use – low spend • Domestic use – high spend • Non domestic use – low spend • Non domestic use – high spend 	<ul style="list-style-type: none"> • Spread of sector • Range of locations
--	--	--

NHH FREEFIND RECRUITMENT SCREENER

Hello, my name is _____ and I am from _____, a market research company.

We are looking for businesses to take part in an exciting, in-depth project on behalf of [Wessex Water/Bristol Water and Wessex Water/Bournemouth Water and Wessex Water].

This is what the project is all about: all water companies make future plans on what investments are needed to make sure customers have secure, reliable and high-quality water services – both today and in the future. [Wessex Water/Bristol Water and Wessex Water/Bournemouth Water and Wessex Water] have been talking to thousands of customers, businesses and stakeholders over the last two years to help develop their future plans. They have now commissioned an independent market research agency, Blue Marble Research, to conduct further customer research. We are currently recruiting business customers from the region to take part.

This will enable you to get a rounded picture of these future plans and tell us how you feel about the proposals: this is important because all investment is ultimately paid for through bills – so it is key that you have your say.

We would like to invite you to participate in the following research (choose appropriate choice):

NB: if not known, caller to mention that there are multiple ways to take part and we will come back to the nature of the research at the end of the call.

For larger NHH:

1-hour online telephone or video call on Teams in w/c 1st May:

You will need to join the call 5 minutes early and it will last approximately 1 hour. You will receive £100 as a thank you for your time. We will also provide you with an information pack that you will need to read beforehand – at least one day prior to taking part. This will be sent via email.

For MICRO NHH:

2 x 90-minute group discussions on Microsoft Teams video. One group discussion on w/c 8th May and one group discussion in w/c 15th May.

You will need to attend both group discussions to take part. Please join the calls 5 minutes early – they will last approximately 90 minutes each. You will receive £200 as a thank you for your time. We will also provide you with an information pack that you will need to read prior to the first group – at least one day prior to taking part. This will be sent via email.

SCREENER START

Are you interested in taking part? If yes, then to ensure that we get a broad range of people involved we need to ask you a few additional questions about you and your business. Are you happy for me to take you through some questions?

Q1: Contact details:

Respondent Name:	
Respondent Mobile Number:	
Respondent Email Address:	

RECORD

Q2: Age:

RECORD

Q3: Please can I ask you to confirm which gender you identify as?

Male	1
Female	2
Prefer to self-describe	3
Prefer not to say	4

RECORD

Q4: What is your occupation and job role:.....

ALL TO BE MANAGEMENT/DECISION MAKING LEVEL IN THEIR BUSINESS

MUST NOT BE ASSOCIATED WITH A WATER SERVICE PROVIDER E.G. WATER COMPANY OR ANY OF ITS AFFILIATES (OFWAT, DEFRA, CCW, DWI, EA). MUST NOT WORK IN MARKET RESEARCH, ADVERTISING, PR OR MEDIA.

Q5a: Where is your business located:.....

**RECRUITER TO CHECK THAT BUSINESS FALLS WITHIN CORRECT REGION
ENSURE RANGE OF LOCATIONS WITHIN EACH REGION**

Q5b: Does your business have its own premises where it is responsible for paying its own business water bills, or is this included in your rent/service charge?

YES, the business is responsible	1
NO, this is included in our rent	CLOSE
NO, the business does not operate from its own premises	CLOSE

ALL BUSINESSES TO BE RESPONSIBLE FOR PAYING ITS OWN BUSINESS WATER BILLS

Q5c: Are you the person in your business who is responsible for paying and managing the utility bills, including the water bill?

YES, solely responsible	1
YES, jointly responsible	2
NO, I am not responsible	CLOSE

ALL MUST BE SOLELY OR JOINTLY RESPONSIBLE FOR PAYING/MANAGING THEIR WATER BILLS

Q6a: Now to find out some details about your business, can you tell me which business sector you are in?

- A) Manufacturing & Agriculture
- B) Construction & Transport
- C) Financial, Professional Services, Admin or Retail
- D) Tourism, Food, Leisure or Entertainment
- E) Education, Health, Residential Care
- F) Public Sector
- G) 3rd Sector organization

PLEASE ENSURE GOOD SPREAD ACROSS SAMPLE

Q6b: How many employees does your business have?

1-5 employees	MICRO NHH
6-10 employees	MICRO NHH
11-49 employees	LARGER NHH
50-250 employees	LARGER NHH
More than 250 employees	LARGER NHH

ALLOCATE:

MICRO NHH – 10 EMPLOYEES OR LESS

LARGER NHH – MORE THAN 10 EMPLOYEES

Q6c: And how much does the business spend on its annual water bill?

Write in: _____

ALL TO BE WILLING TO SHARE THEIR ANNUAL WATER SPEND FOR THEIR BUSINESS

Under £500	LOW SPEND
£501-£1000	LOW SPEND
£1001-£3000	HIGH SPEND
£3001-£5000	HIGH SPEND
More than £5000	HIGH SPEND

Representing 4 quartiles of water use and volume (spend)

- Domestic use – low spend

- Domestic use – high spend
- Non domestic use – low spend
- Non domestic use – high spend

Q6c: How does your business use water. Which of the following applies to your business?

a) Water is used primarily for domestic use i.e., in kitchens, toilets, bathrooms	DOMESTIC USE
b) Water is used primarily for non-domestic use e.g. industrial processes; agricultural/horticultural use (e.g. feeding animals or plants); manufacture (an ingredient in food, a constituent part); operational use (e.g. laundry, industrial cleaning, camp sites), hospital or leisure settings (e.g. swimming pools)	NON-DOMESTIC USE

SEE QUOTAS

Representing 4 quartiles of water use and volume (spend)

- Domestic use – low spend
- Domestic use – high spend
- Non domestic use – low spend
- Non domestic use – high spend

Q7: As part of this research, the sessions will be audio and/or video recorded for analysis purposes. Everything you say will remain confidential. Are you happy to participate?

YES, I am	
NO, I am not	CLOSE

ALL MUST BE HAPPY WITH BEING AUDIO/VIDEO RECORDED

Thank you so much for answering my questions, you meet all the eligibility requirements so it would be great if you could take part.

NB: if not already explained, caller to run through nature of research outlined in green at beginning of document.

The answers to the questions I've just been through with you will now be shared with BEAM Fieldwork who will share these with the Research Agency. BEAM Fieldwork will be in touch to confirm your place on the research via email, chat to you further about the research on the phone and [RECRUITER TO PICK]:

- Confirm the date, time of the group discussions and give you some information about the pre-read*
- Book in a suitable date and time for your Teams meeting with Blue Marble and give you some information about the pre-read*

We will be sending the pre-read information via email. Please let us know if you will struggle to receive the materials via email and we can arrange to have these posted to you.

Recruiter Declaration

I confirm that this recruitment screener has been carried out with the respondent named, and that it was done in

accordance with the instructions of BEAM Fieldwork and the Code of Conduct of the Market Research Society.

Recruiter Name:

Recruiter Signature:

Date:

PART ONE

**Thank you for agreeing to participate in this important project.
The research event will involve discussing future investment plans for Wessex Water**

- Please read the following information before coming to the research event. This is designed to give you some background information to the topics we will be discussing.
- This exercise should take no longer than 20 minutes
- There are 3 sections to read: this is Part One
- **Please don't worry if you don't understand or remember the information** – it will all be recapped during the research – and there will be time for questions.
- Please complete the short survey at the end of the document at least the day before the event.

Water companies in England and Wales

There are 11 water companies that provide **both water and sewerage services**

There are also 5 companies that provide **water services only**

Some households have 2 separate suppliers:

e.g. some people in Bristol receive **water services from Bristol Water** and **sewerage services from Wessex Water**

Water companies are regional: people have to receive water services from the company that covers where they live

Business customers can choose their water and sewerage retailer. While this retailer is the first point of contact for business customers, water companies (also known as the 'wholesaler') still provide water and sewerage services to business customers on behalf of the retailer.



Wessex Water provides essential services across Somerset, Wiltshire, Dorset, Bath & Bristol.

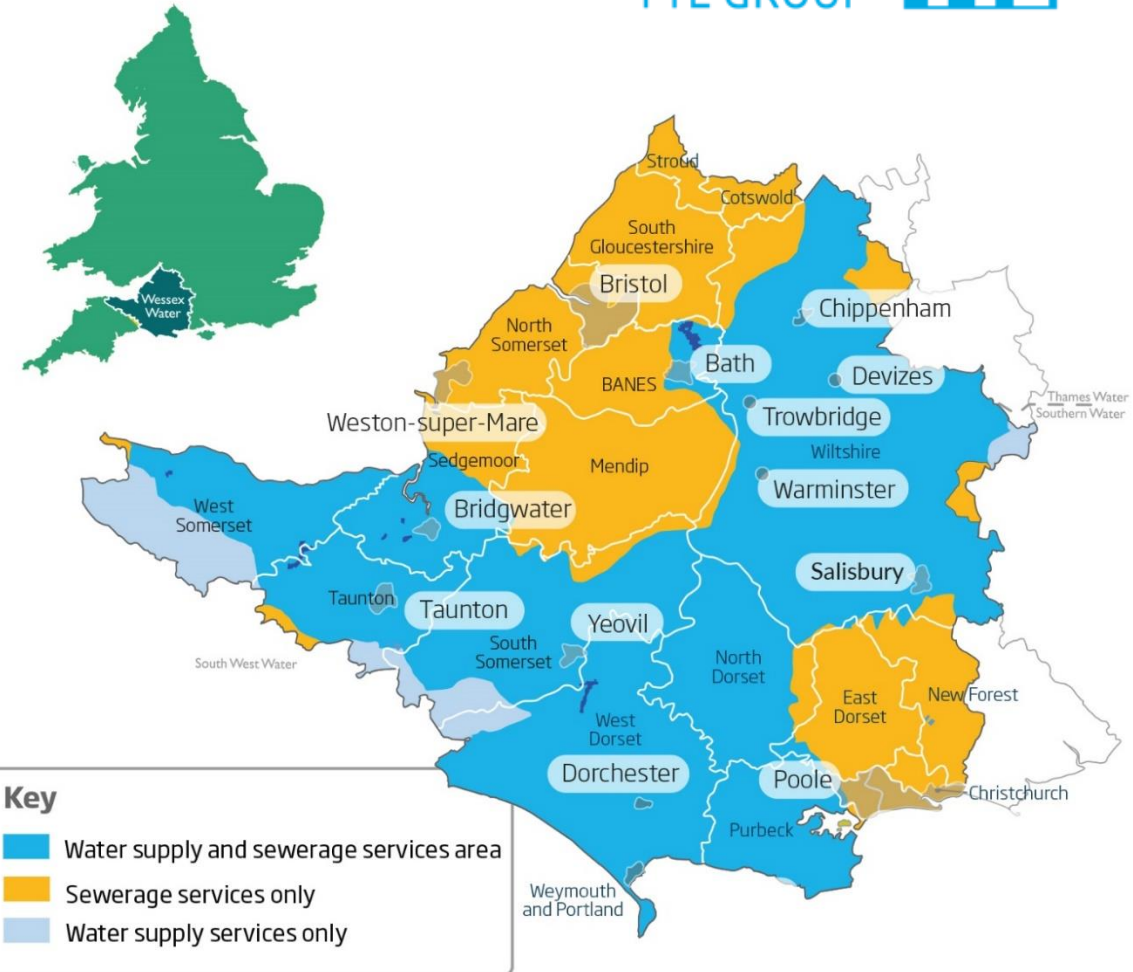
- It directly employs over 2,700 people

It provides sewerage services for the whole region:

- Approx. 2.9m people and 57,000 businesses

It provides water supply services for all areas excluding Bristol Water and Bournemouth Water areas:

- Approx. 1.4m people and 44,000 businesses
- **Businesses in the region receive water from Portsmouth Water, but primarily deal with their retailer who bills them and provides customer services.**



Every five years, **water companies develop a 'business plan'** that sets out how they want to develop their services, and the proposed cost to customers.

As customers are not able to choose their water company, water companies must give them a say about **what they want from their services and the price they pay.**

Talking to customers also helps water companies **prioritise what to do first or what to do most of** – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.





The business plan and prices are then **finalised by Ofwat** in a process known as the Price Review. There is more information about this here: 'All about the price review'.

Available at:

<https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are **'acceptable'** to you and whether you can **afford** the proposed bills from 2025-2030.

Companies also have to show to Ofwat that their **plans reflect what their customers want** – that means refining the plans based on what customers tell them.





1.
Water is collected
groundwater,
reservoirs or
rivers and treated



2.
Clean water
supplied to
customers



3.
Customers
receive a safe
supply of water



4.
Customers
flush waste
water

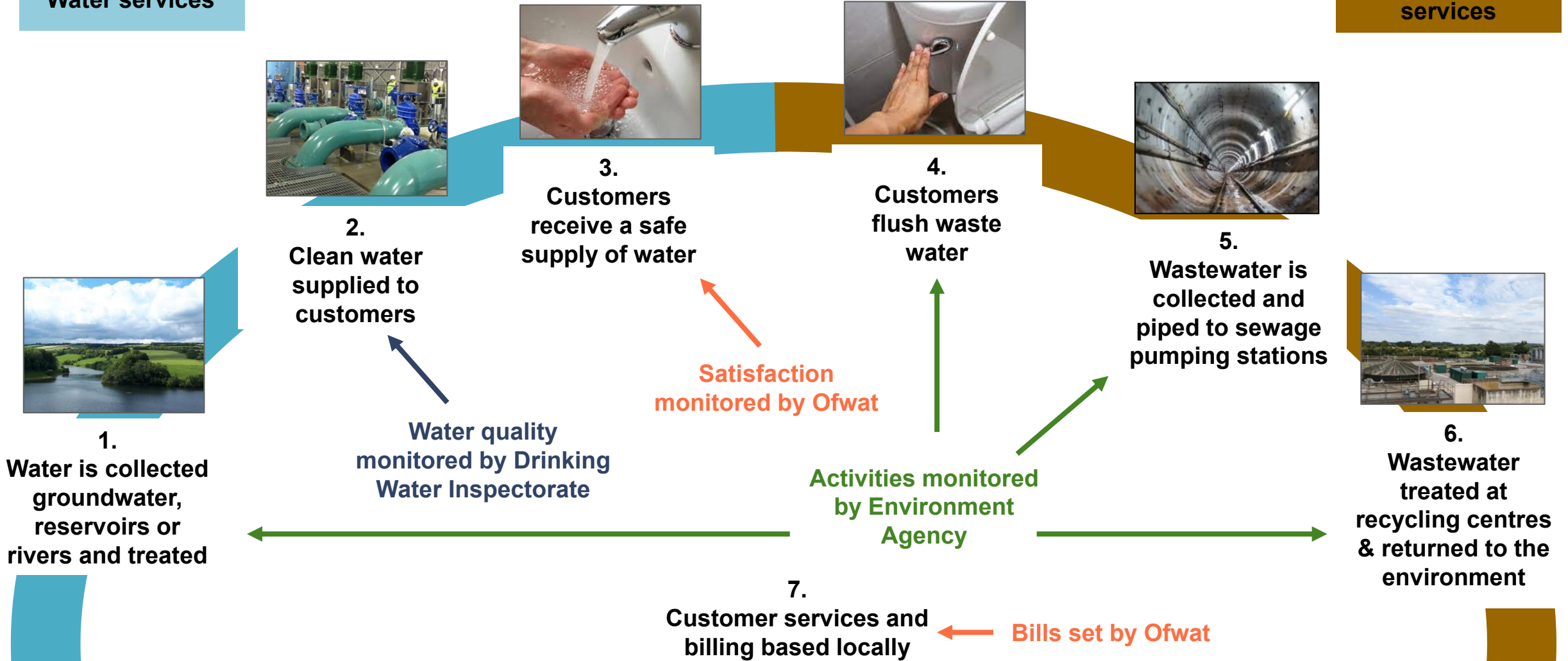


5.
Wastewater is
collected and
piped to sewage
pumping stations



6.
Wastewater
treated at
recycling centres
& returned to the
environment

7.
Customer services and
billing based locally



Water companies are currently part way through their five-year business plan for 2020 to 2025. They have **service level targets, called 'performance commitments'**, in every five-year business plan.

These **targets are based on what customers have previously told companies they would like them to do**, and on Ofwat's assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

We are now going to show you how well your water and/or sewerage company is doing on some of their performance commitments, compared to other water companies in England and Wales. These performance commitments are a snapshot of the wide range of services companies provide. We are showing these examples as customers have told us they are particularly important to them.

Water companies have to provide **reliable services**, and plan for their services to be **resilient** to changing weather patterns and demand from consumers.

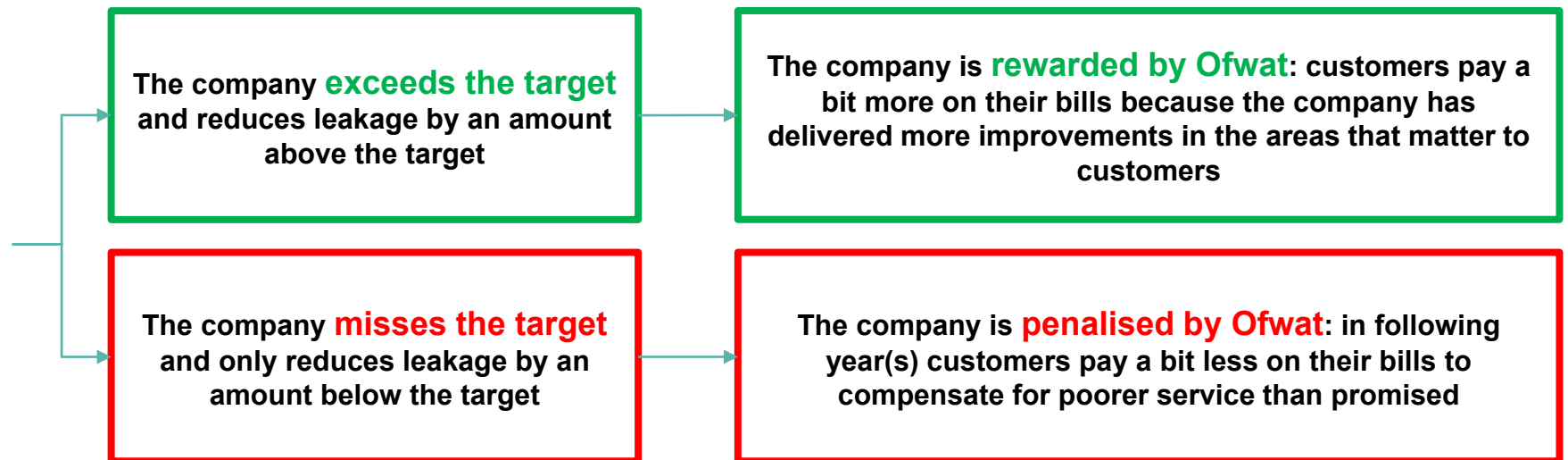
Companies can **miss** or **exceed** performance commitment targets for a number of reasons.

For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets

Example:

Water company sets a performance commitment based on customer priorities:

To reduce leakage from water mains and pipes





How has my bill been affected by Ofwat's penalties and incentives?

- Last year Wessex Water **passed 31** and **failed 11** performance commitment targets (with 2 neither passing or failing) earning them an overall reward of **£5.2m** that they could receive via customer bills (which would equate to £12 per household)
- However with bills already increasing it has deferred this reward so customer bills have not increased to pay for it.

PART TWO

Next we are showing you how Wessex Water performs in relation to other water companies across England and Wales

- The water industry uses a number of measures to assess performance. Because the water companies are very different in size and number of customers, these measures are often 'normalised' to give a fair comparison
 - E.g. on the next slide you'll see information about the number of minutes households are without water per property per year. This is an average: in reality, most houses don't experience problems but some will be without water for longer periods. But to be able to compare companies, the total interruption time is divided by all households in the region
- Please read the information and consider where you are happy with Wessex Water's performance – and where you would like to see improvements.

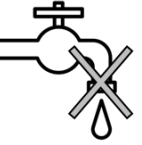
Water supply interruptions, without warning, for over 3 hours

If a water supply is interrupted without warning for over 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

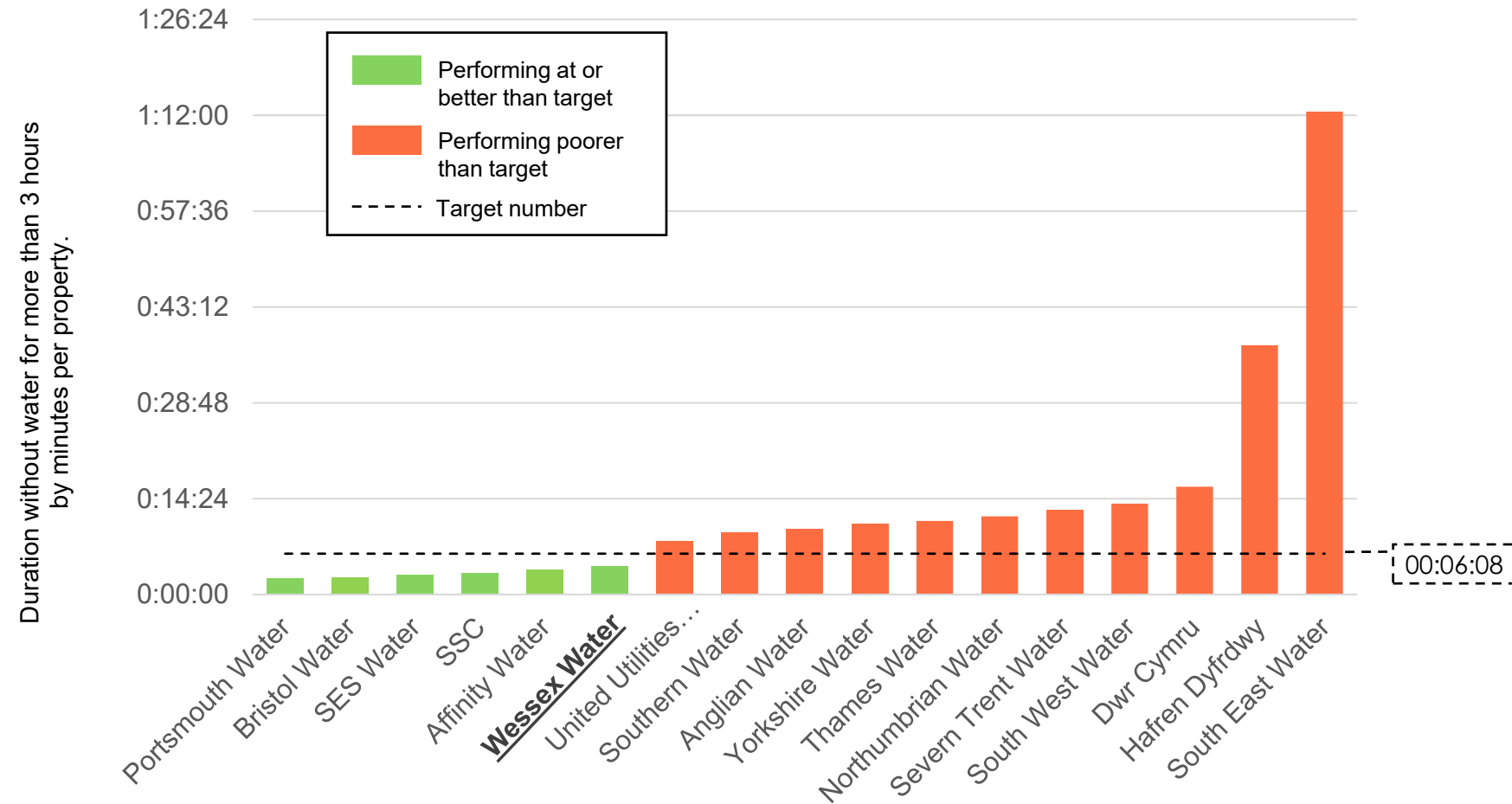
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-62%
Bristol Water	-59%
SES Water	-52%
SSC	-47%
Affinity Water	-39%
Wessex Water	-32%
United Utilities Water	+30%
Southern Water	+53%
Anglian Water	+60%
Yorkshire Water	+73%
Thames Water	+80%
Northumbrian Water	+92%
Severn Trent Water	+106%
South West Water	+123%
Dwr Cymru	+164%
Hafren Dyfrdwy	+511%
South East Water	+1083%

Water companies measured on the length of time properties are without water.



Duration without water for more than 3 hours
by minutes per property.
(A lower bar / number is better.)



The appearance, taste and smell of tap water

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.

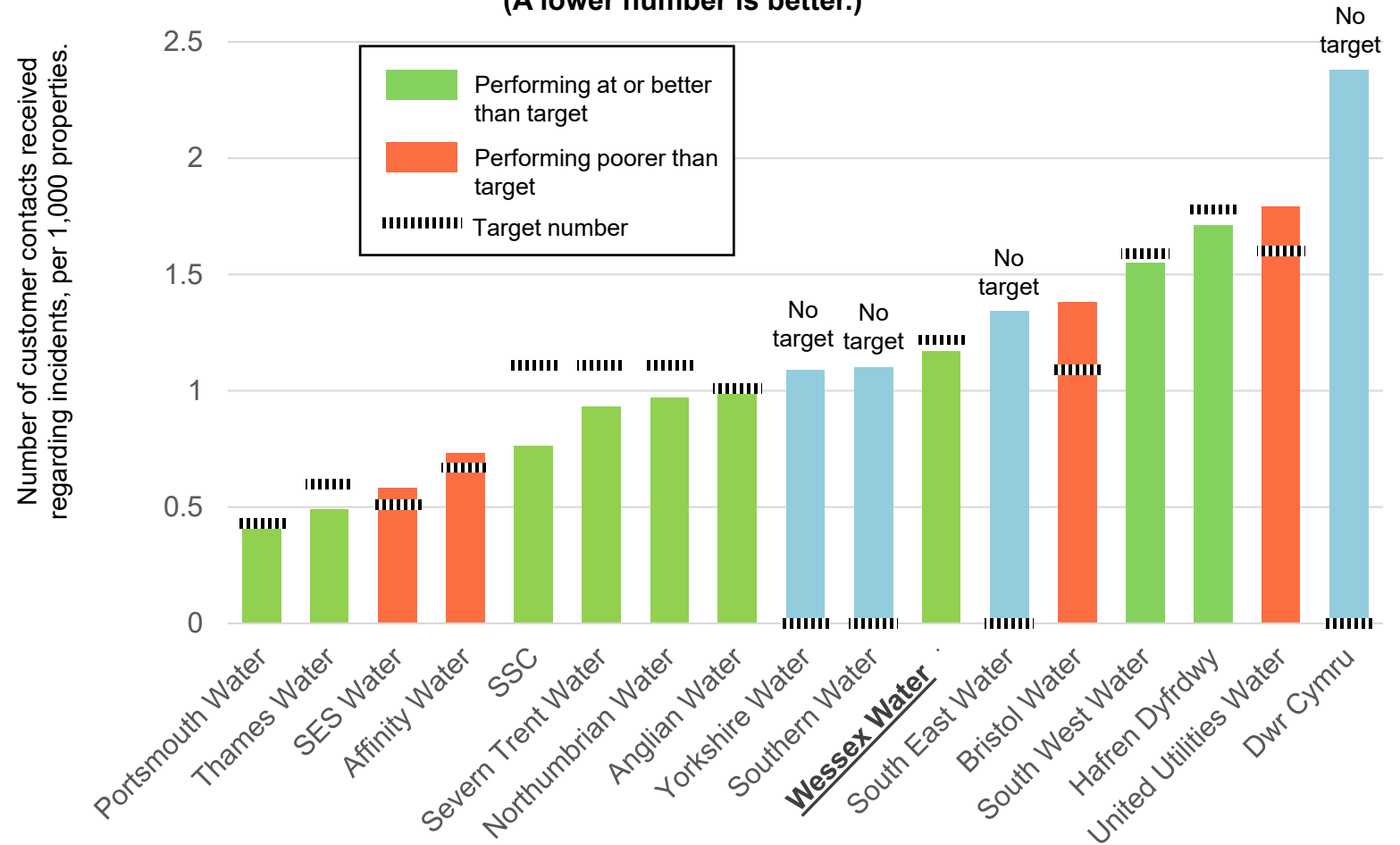
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-5%
Thames Water	-18%
SES Water	+14%
Affinity Water	+9%
SSC	-32%
Severn Trent Water	-16%
Northumbrian Water	-13%
Anglian Water	+2%
Yorkshire Water	No target
Southern Water	No target
Wessex Water	-4%
South East Water	No target
Bristol Water	+27%
South West Water	-3%
Hafren Dyfrdwy	-4%
United Utilities Water	+12%
Dwr Cymru	No target

Water companies measured on the number of customer contacts regarding the appearance, taste and smell of tap water.



Number of customer contacts received regarding incidents, per 1,000 properties.
(A lower number is better.)



Sewage flooding of properties

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.

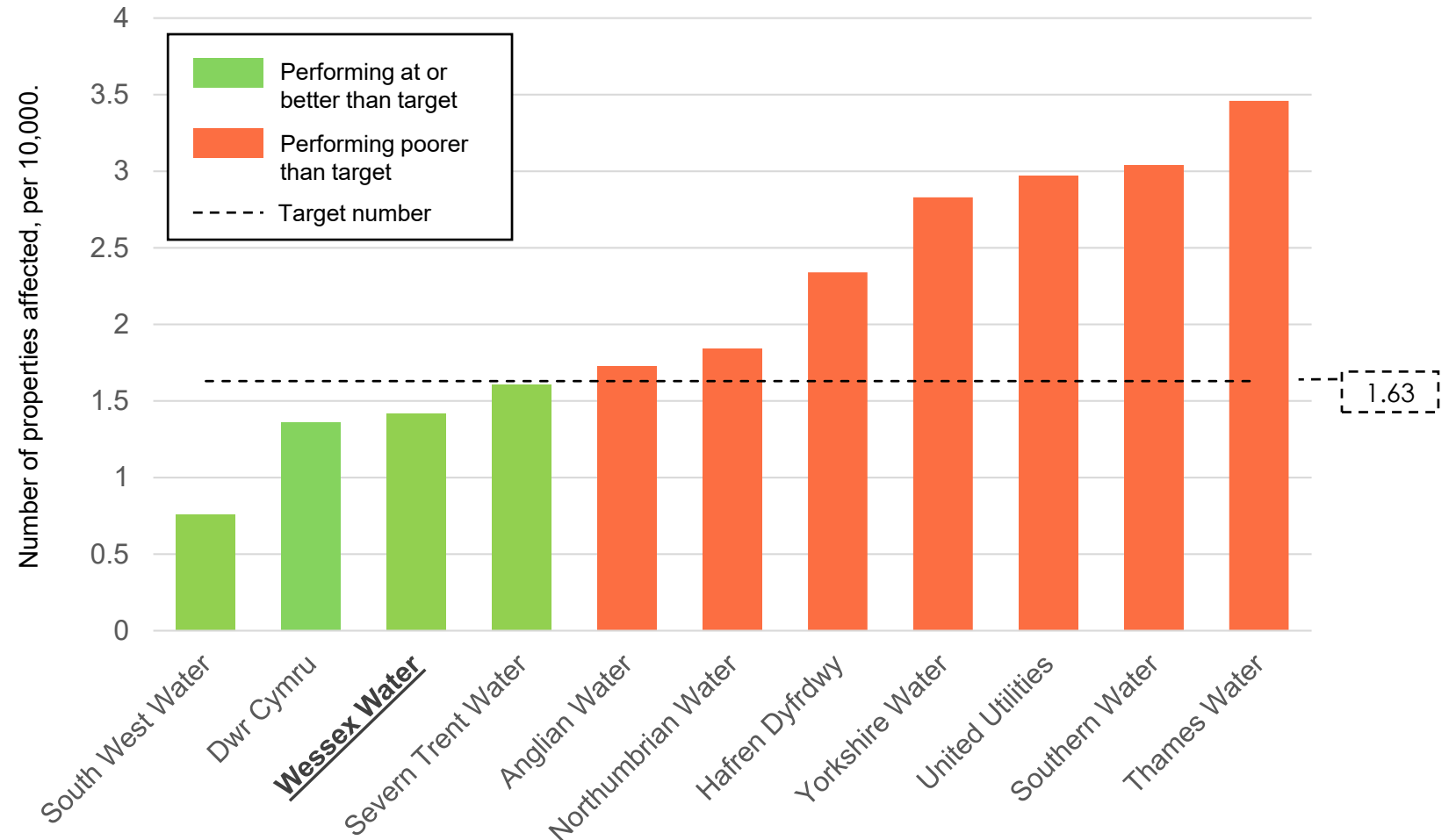
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
South West Water	-53%
Dwr Cymru	-17%
<u>Wessex Water</u>	<u>-13%</u>
Severn Trent Water	-1%
Anglian Water	+6%
Northumbrian Water	+13%
Hafren Dyfrdwy	+44%
Yorkshire Water	+74%
United Utilities Water	+82%
Southern Water	+87%
Thames Water	+112%

Water companies measured on the incidents of sewage flooding properties.



Number of properties affected, per 10,000.
(A lower number is better.)



Sewage flooding of gardens or outbuildings

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

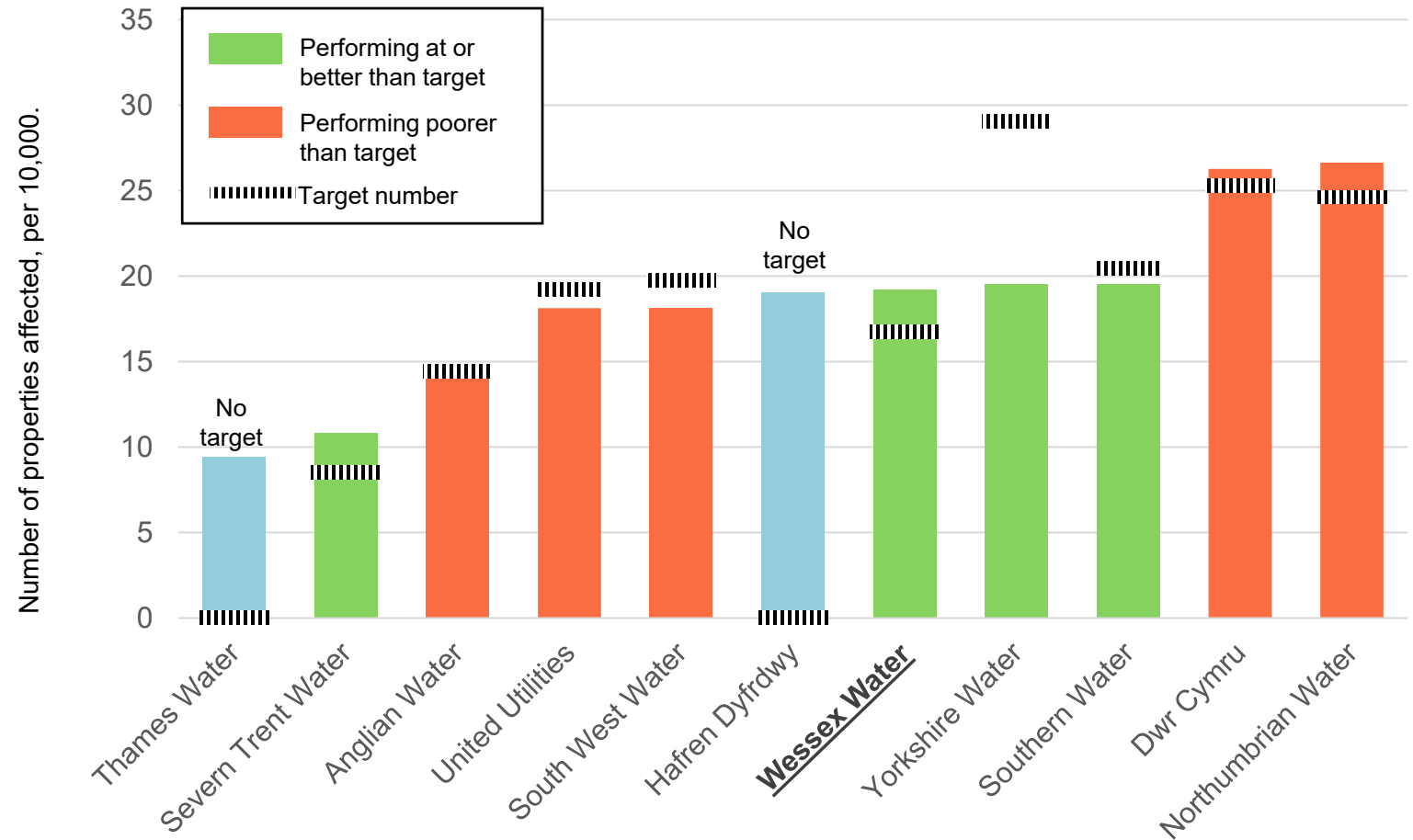
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Thames Water	No target
Severn Trent Water	+27%
Anglian Water	+1%
United Utilities Water	-6%
South West Water	-8%
Hafren Dyfrdwy	No target
Wessex Water	+15%
Yorkshire Water	-33%
Southern Water	-4%
Dwr Cymru	+4%
Northumbrian Water	+8%

Water companies measured on the incidents of sewage flooding gardens or outbuildings.



Number of properties affected, per 10,000.
(A lower number is better.)



Reducing leaks

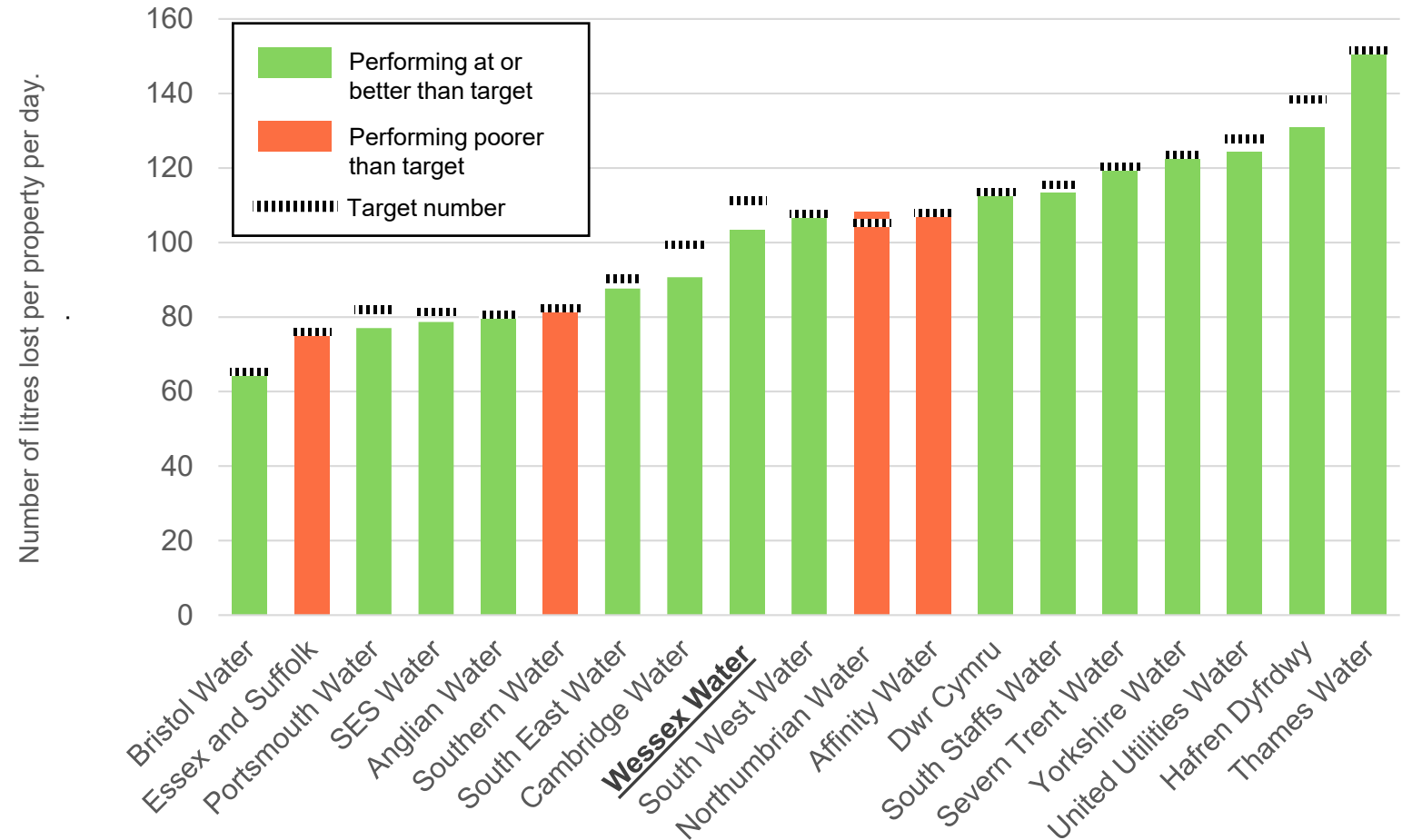
Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Bristol Water	-0.3%
Essex and Suffolk	+0.5%
Portsmouth Water	-6.0%
SES Water	-3.3%
Anglian Water	-0.5%
Southern Water	+1.1%
South East Water	-2.8%
Cambridge Water	-8.8%
Wessex Water	-7.1%
South West Water	0%
Northumbrian Water	+2.9%
Affinity Water	+0.6%
Dwr Cymru	-1.0%
South Staffs Water	-1.7%
Severn Trent Water	-0.6%
Yorkshire Water	-0.5%
United Utilities Water	-2.9%
Hafren Dyfrdwy	-5.3%
Thames Water	0%

Water companies measured on the amount of water lost due to leaks from water mains and pipes.

Number of litres lost per property per day.
(A lower number is better.)



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.

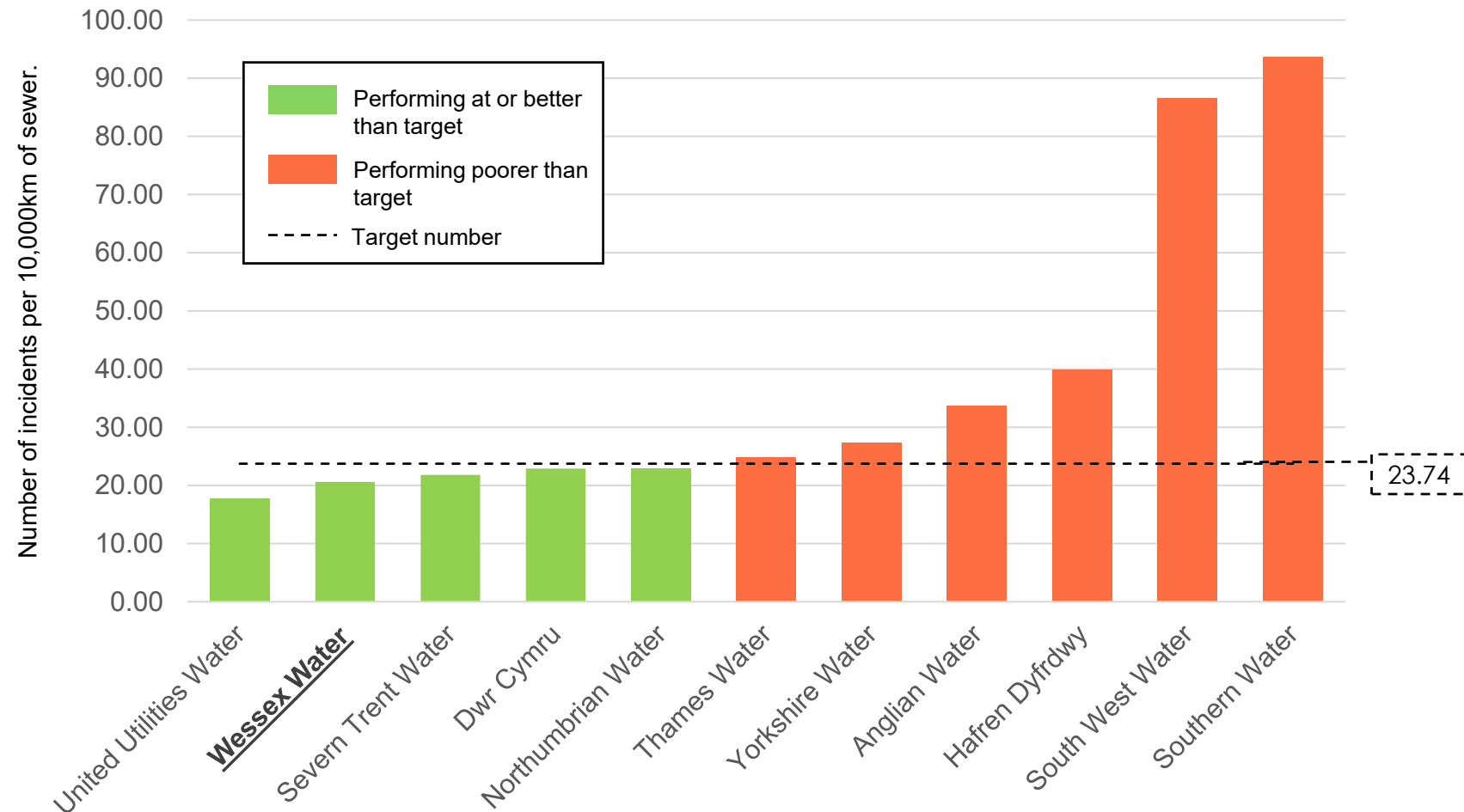
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
United Utilities Water	-25.3%
Wessex Water	-13.2%
Severn Trent Water	-8.1%
Dwr Cymru	-3.6%
Northumbrian Water	-3.2%
Thames Water	+4.7%
Yorkshire Water	+15.3%
Anglian Water	+42.2%
Hafren Dyfrdwy	-70.9%
South West Water	+264.7%
Southern Water	+294.4%

Water companies measured on the number of incidents of pollution of rivers and streams.

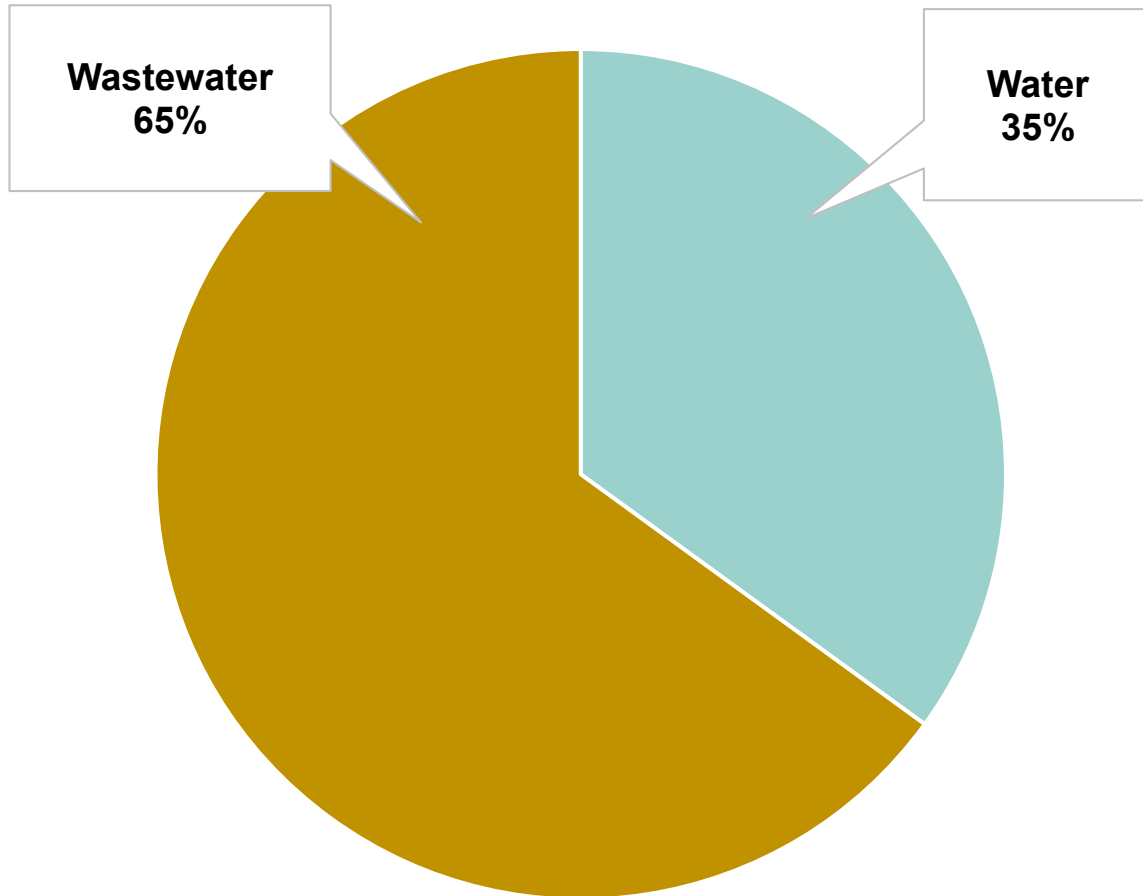


Number of incidents per 10,000km of sewer.
(A lower number is better.)

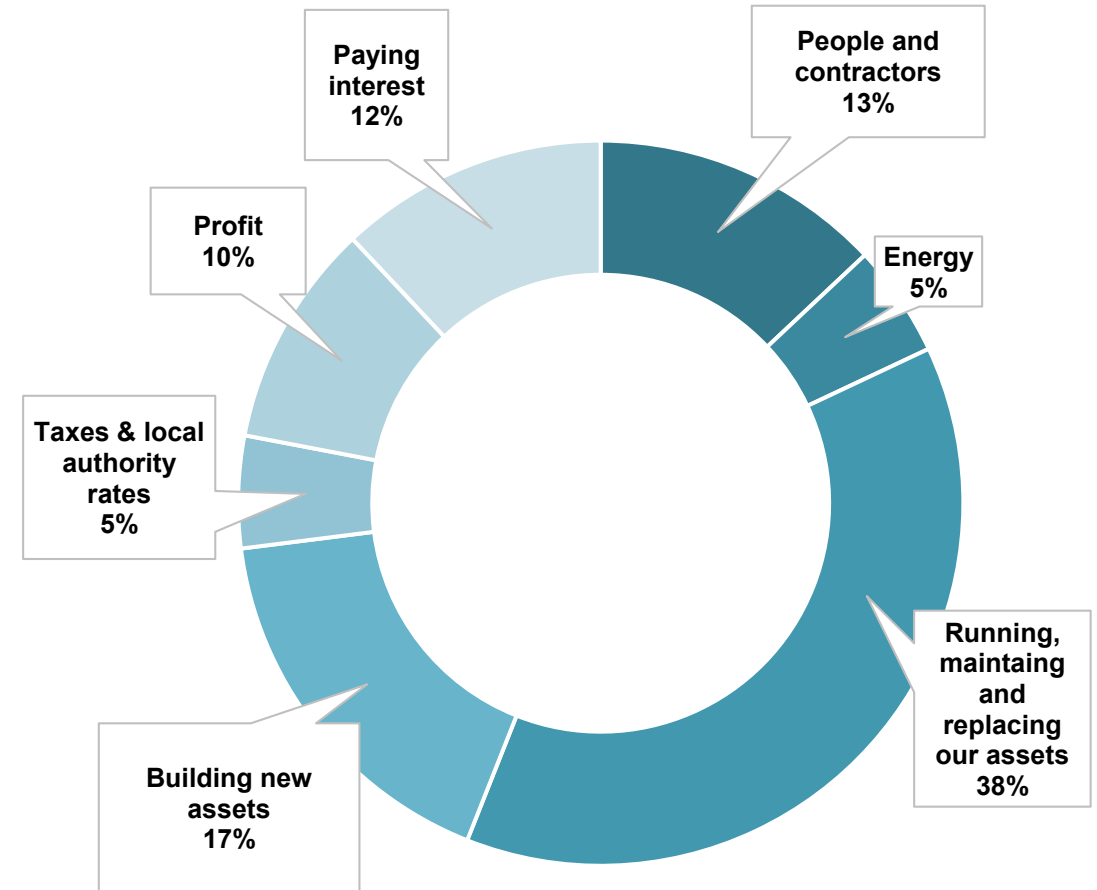


Household bill breakdown

Split for every £1 spent for an average customer



How the household bill breaks down



PART THREE

Finally we are showing you a headline summary of Wessex Water's proposed business plan for 2025-30.

- We will be discussing in more detail all the different elements of this plan when we meet you at the research event
- Once you've read it, please use the short (2 question) survey to note down your comments and questions
- Do remember that this research is about customers having their say on the plans before they are submitted to the regulator.

The following slide outlines Wessex Water proposed investment plan for 2025-30

There are 3 different types of investments in the plan:

Legally required investments *No say*

All water companies are required to invest in new improvements **to comply with laws including new environmental legislation.**

Customers do not have a say in whether these investments go ahead.

Investments to meet 5 year performance targets *Customer feedback*

All water companies are ***stipulated by regulators*** to set ambitious performance targets.

Customers do have some say in determining whether the targets are ambitious enough – or too ambitious – or too costly.

Longer term investments *Customer input on how and when*

All water companies can propose investments in addition to the minimum requirements **to help meet longer term goals.**

Customers have a large say and can give a view on what they think is the appropriate scale and pace of any additional investments.

2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system

Halve the impact of sewer flooding on our customers



Reducing the number of sewage spills in 150 locations

£55

Reducing internal and external sewer flooding

£25

Reduce sewage spills in further 45 locations

£27

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Reducing leaks

£13

Install smart meters in 90% of all properties

£34

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Nutrient removal

£111

Reduce pollution incidents to 14 per 10k of sewer pipe

£7

Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Keep supply interruptions at 5 mins per property

£0

Reduce contacts re taste, smell, look

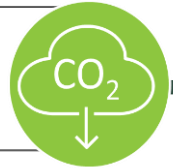
£4

Replace 12,000 lead pipes

£5

Net zero carbon & biodiversity

Be a net zero carbon business By 2040



Reduce carbon & pollutants from sewer sludge

£18

Operationally net zero

£10

What will it mean for bills?

This proposed plan will have an impact on customers' bills.













A £1000 bill today would increase by £61/month by 2030.

This breaks down as:

- £22 to meet the investment required by the regulators (*the blue and grey investments*)
- £9 to meet the investments we propose over and above this (*the white investments*)
- £30 to meet inflation

Wessex Water proposes an investment plan for 2025-30 to start to meet its long term goals.

The proposed commitments to improve on the key performance areas

			TODAY's performance	Target performance by 2030	What this will add to your bill
Supply interruptions		<i>Average time without water per household</i>	5 mins	 5 mins	£0
Water Quality		<i>Contacts per 1,000 population</i>	1.17 contacts	 1 contact	£4
Internal sewer flooding		<i>Incidents per 10,000 connections</i>	1.43 incidents	 1.04 incidents	} £25
External sewer flooding		<i>Incidents per 10,000 connections</i>	19.27 incidents	 14.5 incidents	
Leakage		<i>Number of litres lost per property per day</i>	103.29 litres	 93.02 litres	£13
Pollution		<i>Incidents per 10,000km of sewer</i>	20.6 incidents	 17.6 incidents	£7

THANK YOU FOR READING THIS INFORMATION.

PLEASE NOW ANSWER THE QUESTIONS IN THE LINK AND
SUBMIT THEM BEFORE COMING TO THE RESEARCH:

<https://forms.office.com/e/wXPpPSk0Pm>

This will only take around 5 minutes to complete.

(NB: if you require a paper copy please request one from BEAM)

Please have this document somewhere to hand during your research session

WE LOOK FORWARD TO CHATTING WITH YOU IN THE RESEARCH SESSIONS.



BLUE MARBLE

ACCEPTABILITY & AFFORDABILITY DISCUSSION GUIDE IDI for NHH MODERATOR GUIDE

Overview

- | |
|---|
| <ul style="list-style-type: none"> • 1 hour online interview groups with non-household customers • Company/CCG representatives to attend – primarily in observation role |
|---|

Welcome & Introductions and temperature check
Reactions to pre-task
Focus on the long term picture
Overview of Proposed plan
Focus on legally required investments (PROPOSED)
Focus on discretionary elements (with phasing)
Bill impacts
Alternative shorter-term picture (MUST-DO) & Bill impacts
Wrap-up, post task & thank you

Welcome & Introductions & temperature check (5 mins)

Aim: welcome participant to the session, introduce Blue Marble and observers and set out expectations of the event

- Ensure participant have turned on cameras and microphones, and troubleshoot any tech issues
- Welcome everyone to the event.
- Introduce Blue Marble and explain that we are an independent research agency.
- Explain: Confidentiality, GDPR, recording, how data will be used.
- Objective for the session: to help Wessex Water make important investment decisions.
- Role of respondents:
 - Asking participant to act as representatives of the business community of the Wessex Water region;
 - There are no right or wrong answers we just want to hear people's open and honest views;
 - We will provide lots of information and expect much of it will be new to them – encourage people to ask questions.

Observers/Wessex Water representatives (CCG): each to briefly introduce self – name, job title and 1 sentence summary of role/responsibilities – then turn cameras off.



Discussions (2 min)

Introductions

Each respondent to introduce self:

- Name, nature of business,
- Current challenges in operating environment
- Perspective on the economic climate: is it getting better or worse?
 - If not improving, when do you anticipate the financial situation will start to improve?
- How are you feeling about the financial situation looking into the future:

Discussions (3 mins):

- *Awareness and experience of the water company*
 - How much of this is new information for you?
 - What contact do you have with your water company and retailer?
- *Understanding the role of water companies*
 - Were there any surprises in terms of what they do as a business?
- *Participants' sentiment towards their water company*

What kind of relationship do you have with your water company?

Probe:

- Understanding of relationship between wholesaler (Wessex Water) and retailer (org that sends bills/deals with customer queries)
- Price review regulated by Owat
- The regulators (OFwat, DEFRA, Drinking Water Inspectorate, EA, CCW)
- Bill breakdown
- Performance commitments (Wessex Water passed 31; failed 11; 2 neither – earning them £5.2M; paid by customers' bills)

Pre-task recap (10 mins)

Discussions (3 mins):

- Thinking about what was just presented, which areas matter most to your business/organisation?
 - Why?
 - Are there any areas that don't really matter to your business/organisation at all?
- Where do you think investment and improvement is most needed?
- Thinking about all the water and wastewater services that Wessex Water provide for your business/organisation and thinking about your bills:
 - What do you think of the value for money of the service you receive from your wholesale water and sewerage services?
 - In what ways are they providing good value?
 - In what ways are they providing poor value?



SLIDE xx Here we see the 6 key performance targets again and the investment level proposed for the 2025-30 period

Discussions (3 mins):

How do you feel about the targets set? Bear in mind the current performance level (refer to pre-read graphs as necessary)

- Have you got any questions or comments on any of the targets?
- Do any seem too ambitious?
- Do any seem not ambitious enough?
- What are your initial thoughts on the proposed bill changes?
- Generally, do you want to challenge any of these targets?
 - If challenge: what would you like to see changed?

Focus on the long-term picture to 2050 (10 mins)

Before we get into the detail of the investment plans for the next 5 years, we need to understand what Wessex Water is trying to achieve in the long term. The next slides are to give you a bit more context for this research.

SLIDE x: There are some challenges that all water companies have to factor in to their longer term plan:

- *The impact of a changing climate: more extreme weather predictions mean that water companies will need to manage more frequent drought periods and the risk of more intense rain and flooding. Their plans include ways to adapt to climate change and become a net zero business.*
- *The pressures that come with a growing population: this means increasing the water and wastewater networks to accommodate new housing developments and building new sustainable ways to capture storm water to prevent it overwhelming the drains and sewers – especially necessary in built up areas.*
- *Some new laws and regulations: all water companies have to comply with environmental laws in England. They also have to consider how climate change and population growth affect current and future capacity of sewage and rainwater drainage networks. These cover a range of areas including:*
 - *Reducing pollution of seas and rivers from sewage overflows.*
 - *Not taking too much water from rivers and from underground to protect the ecology.*
 - *Making sure there is enough water available to protect the natural environment as well as providing a public water supply.*
 - *Treating water and wastewater to a standard that does not harm the natural environment.*
 - *Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.*
- *And then there's the economic situation – the cost of living crisis and high inflation. Also the rising costs for businesses.*



SLIDE 31: Wessex Water has 8 outcomes which are its ambitions or goals for 2050.

Discussion (3 mins)

- What do you think about the long-term plans Wessex Water have set out?
- Which one or two outcomes matter most to your business/organisation – probe why
- Which matter least? Why?
- These ambitions sit in the 2050 timeframe (or 2040 in the case of net zero) but which would you like to see achieved sooner than 2050? Probe why.
- Which do you think are most urgent to achieve?

Introduce shorter-term (proposed business plan) – 20 mins

SLIDE xx There are 2 plans that we will be showing you. The 'Proposed' plan includes extra work over and above what they are required by law - to provide extra benefits to customers, the environment and local communities. We will also be showing you a second plan which we are calling the 'must do' plan. It allows Wessex Water to just carry out the work that they are required to do by law – and would have the lowest impact on customer bills.

I'm just going to clarify the 3 types of investment for you to consider... SLIDE 35 These are:

SLIDE xx This is the one page plan you saw in the pre-read. MODERATOR: talk through the slide:

- The key investments relate to the long term outcomes (in colour)
- **Dark blue** are the elements that are legally required of all water companies. We'll briefly tell you about these as they will impact bills – but there isn't and say in these investments
- **In grey** are the performance commitments that we've been looking at already. We'll be asking you if you are happy with the targets that they are proposing for the next 5 years
- **In white** are the additional investments that will help them meet their long term goals for 2050. Here you will be shown some options to choose from depending on how you think they should balance this spend over the next 25 years

Discussion

What are your initial reactions to the type and cost of investments that are proposed?

- Initial reactions to the investment areas:
 - How do these fit with expectations?
 - Any surprises?
 - Any concerns?
 - How acceptable does the plan look (if cost isn't in the equation)
- What are your initial thoughts on the proposed bill changes?
 - How acceptable is the plan once you can see the cost impacts?
 - How affordable is this for businesses?

Focus on legally required investments (5 mins)



We'll start by showing you the legally required investments:

Moderator refer to **SLIDE xx**: the first investment relates to making the sewer system more effective and supports the long term target to reduce the number of sewer flooding incidents by half. We are given some background information here about why the investment is needed – and that it will increase bills by £55 per year between 2025-30.

- How do you feel about the mandatory target set for **Reducing the number of sewage spills**?
 - Do they feel too ambitious/not ambitious enough/about right?
- What are your initial thoughts on the proposed **£55** bill changes?
 - Does this seem reasonable?
 - Is it affordable?
- Do you feel this will support the longer term ambition /2050 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Moderator refer to **SLIDE xx**: this is the other mandatory investment we are shown today.

- How do you feel about the mandatory target set for **Nutrient removal and river water quality monitoring**?
 - Does it feel too ambitious/not ambitious enough/about right?
- What are your initial thoughts on the proposed **£111** bill changes?
 - Does this seem reasonable?
 - Is it affordable?
- Do you feel this will support the longer term ambition /2050 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Focus on discretionary investments (15 mins)

SLIDE xx now we are moving onto look at the 5 longer term investments where customers have a say in how and when these investments are planned between now and 2050.

SLIDE xx: one aspect we will be discussing when looking at the long term investments is how they phase spending – we particularly want your input here because this will have direct consequences for customer bills.

MODERATOR to talk over the 3 examples: The way companies implement their long term investments will have an impact on who pays. Each scenario equates to the same overall bill amount – the difference is when the investment happens – and who ultimately pays.

- The first scenario is for steady rises which will affect current and future customers similarly.
- In the second scenario, bills would rise more sharply now so that everyone benefits as soon as possible from the improvements. This will mean increasing bills for today's customers (even though they may not benefit from the investments).
- In the third scenario, bills would be kept down as the company would delay investing. They will still meet the long term goals but it means the benefit of the investments come later - and future customers will make the biggest contribution through bills.



Discussions

- What is best for them as business customers?
- What is fairest for all current and future customers?
- What is best for society?

First I'll read out some background about an additional investment replacing lead pipes

- Properties built before the mid 1970's may have a lead service pipe. Lead was banned as plumbing material in the 70's. The World Health Organisation state there is no safe level for lead in drinking water
- In areas where there are lots of properties with lead service pipes, water companies dose the water with phosphate to reduce lead being picked up in the drinking water
Wessex Water have a programme of lead pipe replacement to improve water quality.
- It encourages anybody with lead pipes in their home to get them replaced. Between 2020-25 Wessex replaced 9,000 lead pipes. It proposes to continue with further lead pipe replacement and also offer a grant to customers if it can't replace the lead pipes for any reason
- Anybody who has a concern about lead can ask for a water quality sample to be taken

SLIDE xx Show target summary (big screen)

SLIDE xx Phasing **lead pipe** investment: this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach (spend less now) or they could accelerate investment (spending more now).

Discussions How do you feel about the proposed target (which is discretionary) set for **lead pipe replacement**?

- Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Now I'll read out some background about an additional investment for smart meters

The Wessex Water area has been designated as an area of 'water stress' – meaning it can compulsorily meter all properties. Like leakage, reducing the amount of water customers use in their home (or business) will reduce the amount of water taken from the environment.

Today, just over 70% of households have a basic water meter used to generate the water bill every 6 months – none have smart meters.

Smart meters read usage several times a day and can be used to spot leaks around or within the home (e.g. leaking toilets and taps) more quickly than a basic meter could which means they can be fixed quicker too and reduce water wastage.

Through more regular billing and/or via an app, customers can have more control over their bill by finding ways to change their water using habits



SLIDE xx Show target summary (big screen)

SLIDE xx Phasing smart meter investment: this shows 3 options for reaching the long term goal. We've been looking at option A/the proposed plan. Wessex Water could take the least cost approach (spend less now) or they could accelerate investment (spending more now).

Discussions

- How do you feel about the proposed target (which is discretionary) set for smart meters?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /2040 target?
- Generally, do you challenge this part of the plan, or do you accept it?

Now I'll read out some background about an additional investment for making operations net zero

Wessex Water uses carbon to run its sites, fuel to run vehicles and chemicals to treat water. It also emits greenhouse gases when it treats sewage. It can reduce emissions through generating greener electricity on site and reducing energy and chemical use. It is also moving towards greener treatment processes, where possible

SLIDE xx Show target summary (big screen)

SLIDE xx Phasing this shows 3 options for reaching the long term goal. We've been looking at option A/the proposed plan. Wessex Water could take the least cost approach or they could accelerate investment.

Discussions How do you feel about the proposed target set for making operations net zero?

- Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /2040 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Now I'll read out some background about an additional investment relating again to carbon reduction and biodiversity

Sewage sludge is disposed of as fertiliser but it creates carbon emissions when spread on land and potentially leaches micropollutants into the water environment.

Wessex Water needs to reduce these emissions. Furthermore they may not be allowed to spread sludge to land in the future. This will have a big impact as they will need to dispose of the sewage sludge in another way.

SLIDE xx Show target summary (big screen)

SLIDE xx Phasing this shows 3 options for reaching the long term goal. We've been looking at option A/the proposed plan. Wessex Water could take the least cost approach or they could look at an alternative investment.



Discussions How do you feel about the proposed target set for **improving the treatment of sewage sludge to remove micropollutants from being spread to land?**

- Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Now I'll read out some background about an additional investment further reducing the number of sewage spills?

- NB Moderator refer to plan on a page and the mandatory investment so that respondents understand this is in addition to what was discussed earlier

SLIDE 52 Show target summary (big screen)

*SLIDE 53 Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach or they could accelerate investment.*

Discussions

- How do you feel about the proposed target set for **further reducing the number of sewage spills?**
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

- **SLIDE xx proposed bill change based on an average non household bill of £1,000** (explaining that they will see a personal bill prediction later on for them to respond to)

Discussions (2 mins)

- Response to overall bill impact
 - Acceptability of the plan?
 - Affordability of the bill?
 - Which aspects endorse?
 - Which aspect challenge?

Focus on the shorter-term (MUST-DO business plan) – 5 mins

SLIDE xx & xx Introduce overview and summary of the 'must-do' business plan



- Talk through the 5 areas that will revise the bill changes down (*STIMULUS least cost alternative*)
- *SLIDE xx proposed bill change* based on the average household bill (explaining that they will see a personal bill prediction later on for them to respond to)

Discussions

- How do you feel about the 'least cost/must do' plan
- Which of the 5 areas are you least willing to compromise
- Which are you most willing to forego?

How does this plan impact your business/organisation?

- *SLIDE xx proposed bill change based on an average non household bill of £1,000* (explaining that they will see a personal bill prediction later on for them to respond to)

Discussions

- Response to overall bill impact
 - Acceptability of the plan?
 - Affordability of the bill?
 - Which aspects endorse?
 - Which aspect challenge?

Wrap up and post-task – 1 minute

Thank you very much for all of your input so far. We really appreciate your time and engagement.

To round things up, we'd like you to complete a short questionnaire about some of the things we have discussed today.

Explain process.

NHH In depth Interview

May 2023





What impressions do you have
of Wessex Water?



Supply interruptions

Exceed



Water Quality

Exceed



Internal sewer flooding

Exceed



External sewer flooding

Fail



Leakage

Exceed



Pollution

Exceed

What impressions do you have of the performance?

Climate change impacts



- Warmer, drier summers and wetter winters predicted
- More frequent droughts and floods
- Adapting to climate change
- Reaching net zero

Population changes



- Meeting supply & waster needs for new housing
- Managing pollution risks from increasing sewer use
- Building sustainable drainage for storm water

New and existing statutory requirements



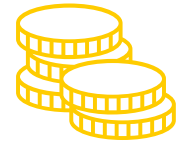
Managing:

- Pollution risks
- Sustainable water 'abstraction'
- Supply & demand: reducing what we use

Protecting rivers and coasts & environmental protections

Water quality

Economic factors



- Cost of living crisis
- Rising costs for businesses
- Affordability of bills
- Inflation



Wessex Water has 7 long term outcomes

This is what they aim to achieve by 2050

Affordable bills



Zero water poverty – no households spending more than 5% of their disposable income on their water bill

Effective sewerage system



Halve the impact of sewer flooding on our customers

Managing demand for water



Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences

Net zero carbon



Be a net zero carbon business by 2040

Safe and reliable water



- 100% compliance with drinking water standards, always
- Zero supply interruptions of longer than 3 hours.

Great river & coastal water



- To restore the quality of our rivers and coastal waters
- Zero pollution incidents

Biodiversity



Double our contribution to the region's biodiversity

1

Proposed plan

This is Wessex Water's proposed plan and includes extra work over and above what they are required by law to provide extra benefits to customers, the environment and local communities

2

'Must do' plan

This plan allows Wessex Water to carry out the work that they are required to do by law

Also the **least cost** plan

There are 3 different types of investments in the plan:

Legally required investments

No say

All water companies are required to invest in new improvements ***to comply with laws including new environmental legislation.***

Customers do not have a say in whether these investments go ahead.

Investments to meet 5 year performance targets

Customer feedback

All water companies are ***stipulated by regulators*** to set ambitious performance targets.

Customers do have some say in determining whether the targets are ambitious enough – or too ambitious – or too costly.

Longer term investments

Customer input: how & when

All water companies can propose investments in addition to the minimum requirements ***to help meet longer term goals.***

Customers have a large say and can give a view on what they think is the appropriate scale and pace of any additional investments.

2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system

Halve the impact of sewer flooding on our customers



Reducing the number of sewage spills in 150 locations

£55

Reducing internal and external sewer flooding

£25

Reduce sewage spills in further 45 locations

£27

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Reducing leaks

£13

Install smart meters in 90% of all properties

£34

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Nutrient removal

£111

Reduce pollution incidents to 14 per 10k of sewer pipe

£7

Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Keep supply interruptions at 5 mins per property

£0

Reduce contacts re taste, smell, look

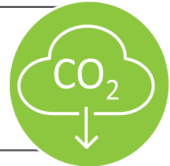
£4

Replace 12,000 lead pipes

£5

Net zero carbon & biodiversity

Be a net zero carbon business By 2040



Reduce carbon & pollutants from sewer sludge

£18

Operationally net zero

£10

What will it mean for bills?

This proposed plan will have an impact on customers' bills.

A £1000 bill today would increase by £61/month by 2030.

This breaks down as:

- £22 to meet the investment required by the regulators (*the blue and grey investments*)
- £9 to meet the investments we propose over and above this (*the white investments*)
- £30 to meet inflation

An effective sewerage system

Legally required
No say

Reducing the
number of sewage
spills in 150
locations

£55



2050 target:

To halve the number of sewer flooding incidents.



Storm overflows

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. This helps to reduce the risk of properties being flooded with sewage.

There are around 15,000 storm overflows in England, and 1,300 for Wessex Water.

Each company (in England) has a target set by Government to reduce the use of storm overflows:

- By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites
- By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm

Wessex Water will need to spend £540m to meet these requirements for 2025-2030, and this will add £55 to a £1,000 water bill.



2050 target

To restore the quality of rivers and coastal waters

Legally required
No say

Nutrient removal
and river water
quality monitoring

£111



The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.

- Excess nitrogen and phosphorus can affect the health of river and coastal waters, negatively impacting plant and wildlife who live there
- A large portion of Wessex Water's region has been designated as requiring additional nutrient removal to allow a further 70,000 homes to be built
- As a result, Wessex Water needs to remove 1,500 tonnes of nitrogen and phosphorus from entering rivers and the sea. This will improve river water quality and help unblock the housing backlog across the country
- Partnership working with farmers and landowners will be vital – and using nature-based solutions where possible, which are often cheaper, create less carbon, and increase biodiversity

Wessex Water will need to spend £830m to meet these requirements for 2025-2030, and this will add £111 to a £1,000 water bill.

2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system

Halve the impact of sewer flooding on our customers



Reducing the number of sewage spills in 150 locations

£55

Reducing internal and external sewer flooding

£25

Reduce sewage spills in further 45 locations

£27

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Reducing leaks

£13

Install smart meters in 90% of all properties

£34

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Nutrient removal

£111

Reduce pollution incidents to 14 per 10k of sewer pipe

£7

Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Keep supply interruptions at 5 mins per property

Reduce contacts re taste, smell, look

£0

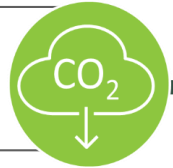
£4

Replace 12,000 lead pipes

£5

Net zero carbon & biodiversity

Be a net zero carbon business By 2040



Reduce carbon & pollutants from sewer sludge

£18

Operationally net zero

£10








2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*












Longer term investments:
your input on how & when

<p>Effective sewerage system</p>	<p>Halve the impact of sewer flooding on our customers</p>		<p>Reducing the number of sewage spills in 150 locations</p>	<p>£55</p>	<p>Reducing internal and external sewer flooding</p>	<p>£25</p>	<p>Reduce sewage spills in further 45 locations</p>	<p>£27</p>	
<p>Managing demand for water</p>	<p>Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences</p>				<p>Reducing leaks</p>	<p>£13</p>	<p>Install smart meters in 90% of all properties</p>	<p>£34</p>	
<p>Great river & coastal water</p>	<ul style="list-style-type: none"> To restore the quality of our rivers and coastal waters Zero pollution incidents 		<p>Nutrient removal</p>	<p>£111</p>	<p>Reduce pollution incidents to 14 per 10k of sewer pipe</p>	<p>£7</p>			
<p>Safe and reliable water</p>	<ul style="list-style-type: none"> 100% compliance with drinking water standards, always Zero supply interruptions of more than 3 hours. 				<p>Keep supply interruptions at 5 mins per property</p>	<p>£0</p>	<p>Replace 12,000 lead pipes</p>	<p>£5</p>	
						<p>Reduce contacts re taste, smell, look</p>	<p>£4</p>	<p>Reduce carbon & pollutants from sewer sludge</p>	<p>£18</p>
<p>Net zero carbon & biodiversity</p>	<p>Be a net zero carbon business By 2040</p>							<p>Operationally net zero</p>	<p>£10</p>

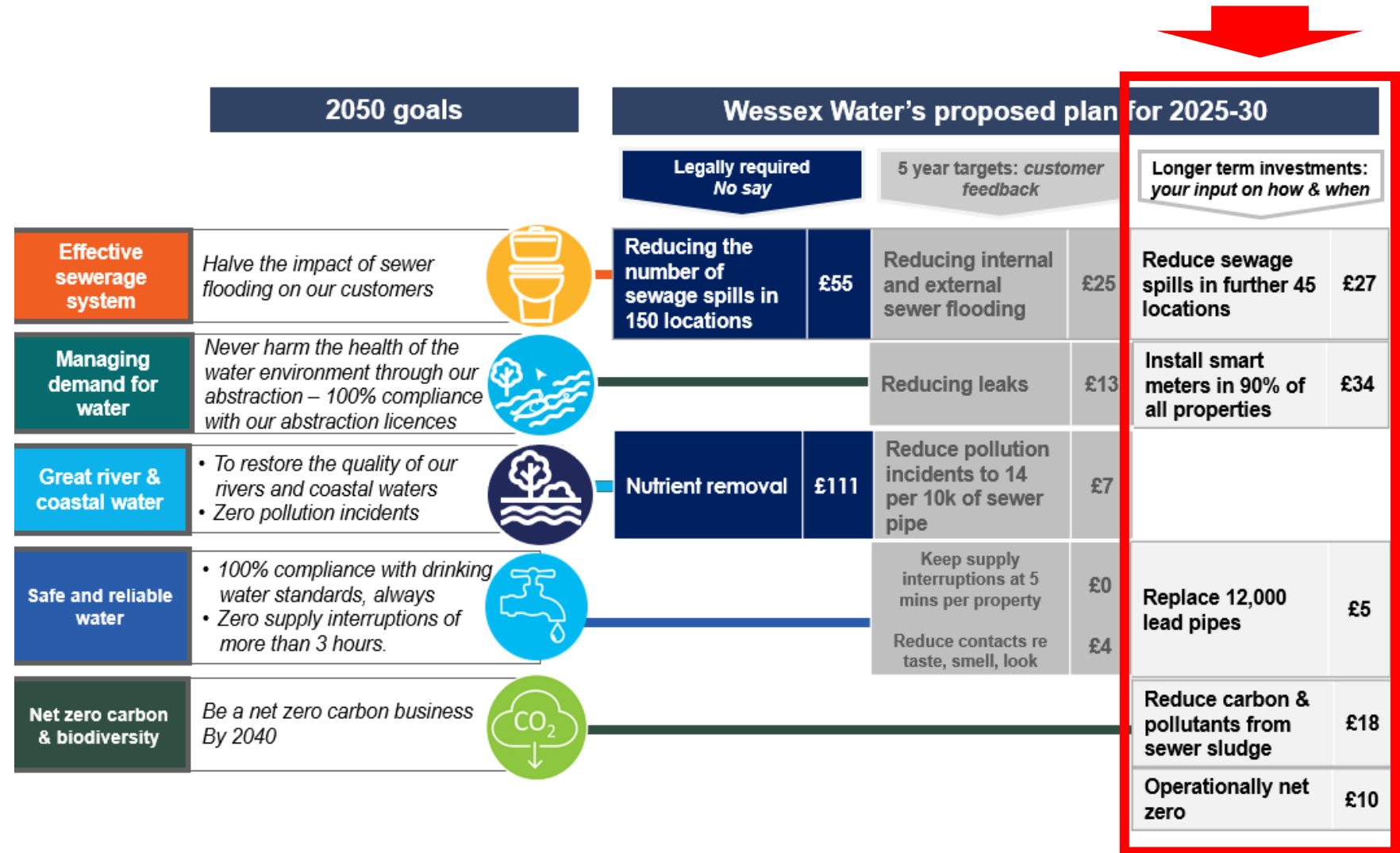
Wessex Water's proposed 5 year targets – your feedback on these

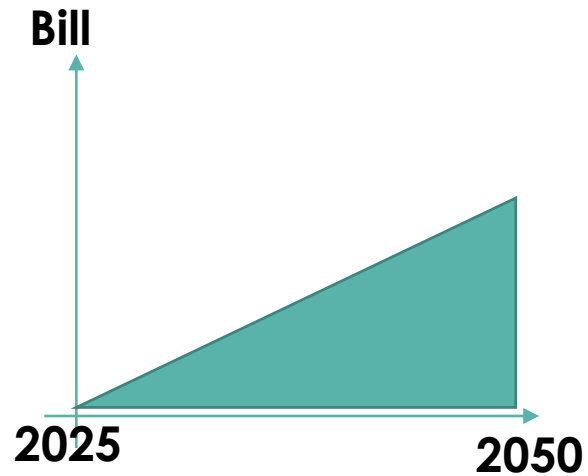
Wessex Water proposes an investment plan for 2025-30 to start to meet its long term goals.

The proposed commitments to improve on the key performance areas

			TODAY's performance	Target performance by 2030	What this will add to your bill
Supply interruptions		<i>Average time without water per household</i>	5 mins	 5 mins	£0
Water Quality		<i>Contacts per 1,000 population</i>	1.17 contacts	 1 contact	£4
Internal sewer flooding		<i>Incidents per 10,000 connections</i>	1.43 incidents	 1.04 incidents	} £25
External sewer flooding		<i>Incidents per 10,000 connections</i>	19.27 incidents	 14.5 incidents	
Leakage		<i>Number of litres lost per property per day</i>	103.29 litres	 93.02 litres	£13
Pollution		<i>Incidents per 10,000km of sewer</i>	20.6 incidents	 17.6 incidents	£7

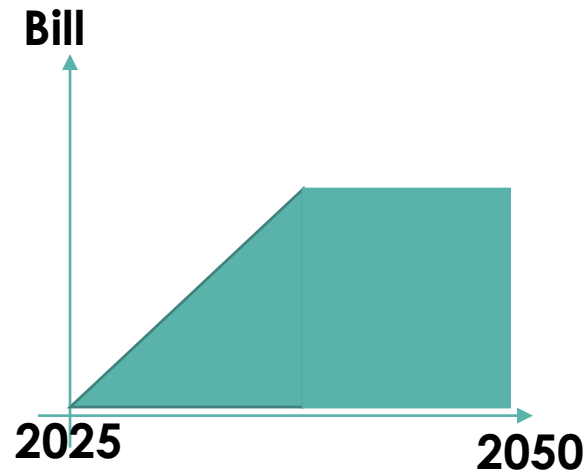
Longer term investments – your input on how and when they do these...





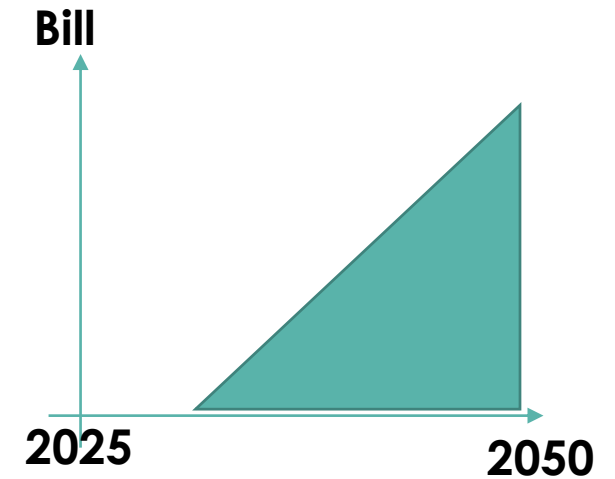
Bills rise steadily over time, and there is an even level of improvement over time

*In this scenario, **today's bill payers and future bill payers** will see a steady increase to their bills*



Bills increase in the next few years, allowing improvements to be made sooner.

*In this scenario, **today's bill payers** will see the biggest increase to bills*



No bill increase now, then the bill increases more sharply so the benefits are delivered later

*In this scenario, **future bill payers** will see the biggest increase to bills*



2050 target:
100% of lead pipes replaced

Discretionary investments
You decide

Replacing 12,000
lead pipes

£5

The proposal is to replace 12,000 customer lead pipes in the next per 5-year period, increasing the rate of replacement thereafter to complete full replacement by 2050.

- Lead pipes are estimated to affect 100,000 properties (which is 18% of all households in the region)
- Replacement would involve the ‘communication pipe’ that runs from the mains to the wall of the house (not within the house)

Wessex Water propose to spend £28.2m on replacing lead pipes, and this would add £5 to a £1,000 water bill.

Discretionary investments
You decide

Replacing 12,000
lead pipes

£5 per year

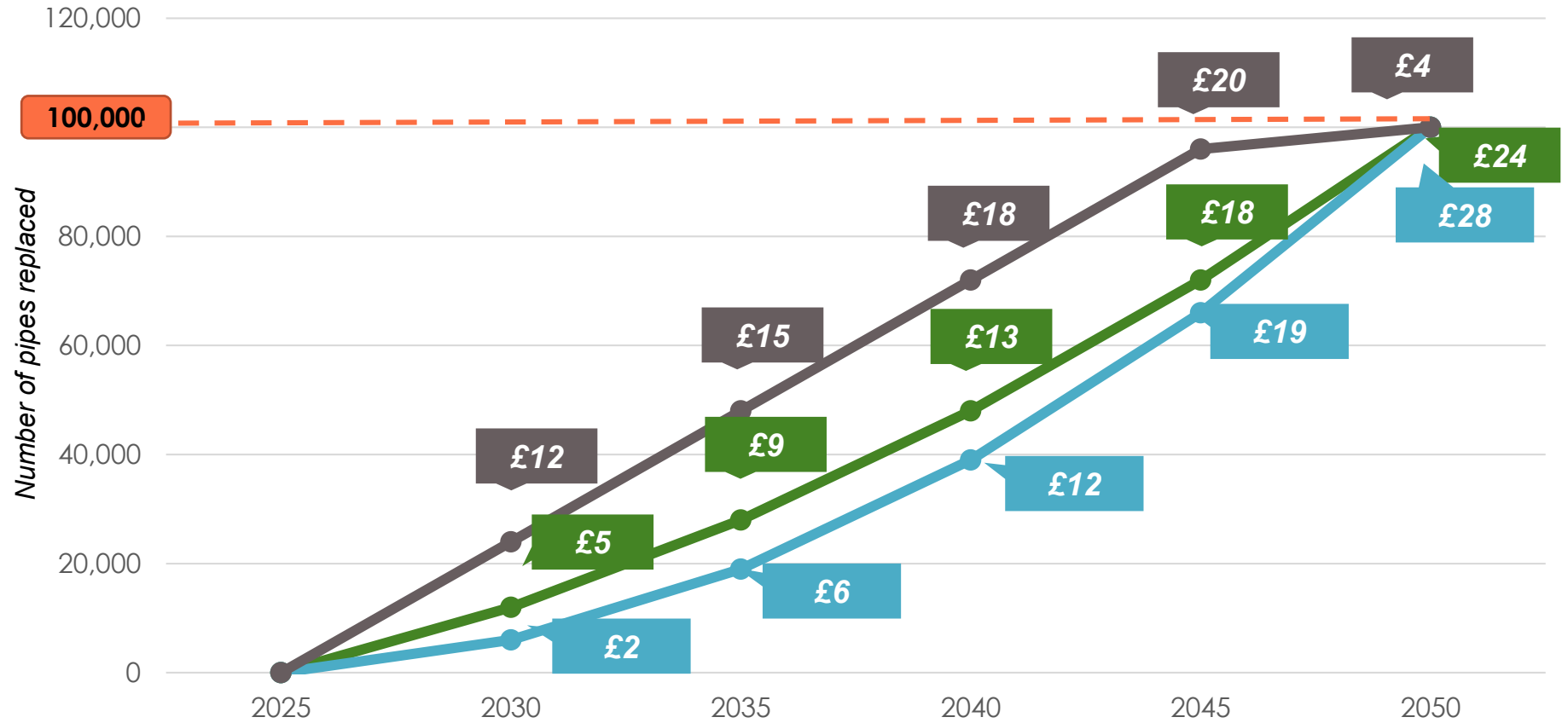
A is the proposed plan.

B is the slower plan

C is the fastest plan

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period

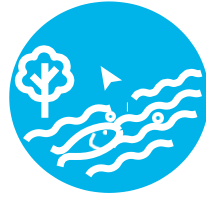


- A:** Spread investment & bills over 25 years: more pipes removed earlier than the lower cost plan
- B:** Delay investment now; accelerate investment in the 2040s
- C:** Investment (and bills) frontloaded to remove more lead pipes sooner

Discretionary investments
You decide

Introduce smart meters to manage leaks and help customers lower use

£34 per year



2050 target:

100% compliance with the amount of water it is licenced to take from rivers and groundwater.

The proposal is to have 90% of all properties installed with a smart meter by 2030. This means installing 600,000 smart meters

Wessex Water propose to spend £180m on introducing smart meters, and this would add £34 to a £1,000 water bill.

Managing demand for water

The long term ambition is to have 90% of all properties installed with a smart meter. This means installing 600,000 smart meters.

Discretionary investments
You decide

Introduce smart meters to manage leaks and help customers lower use

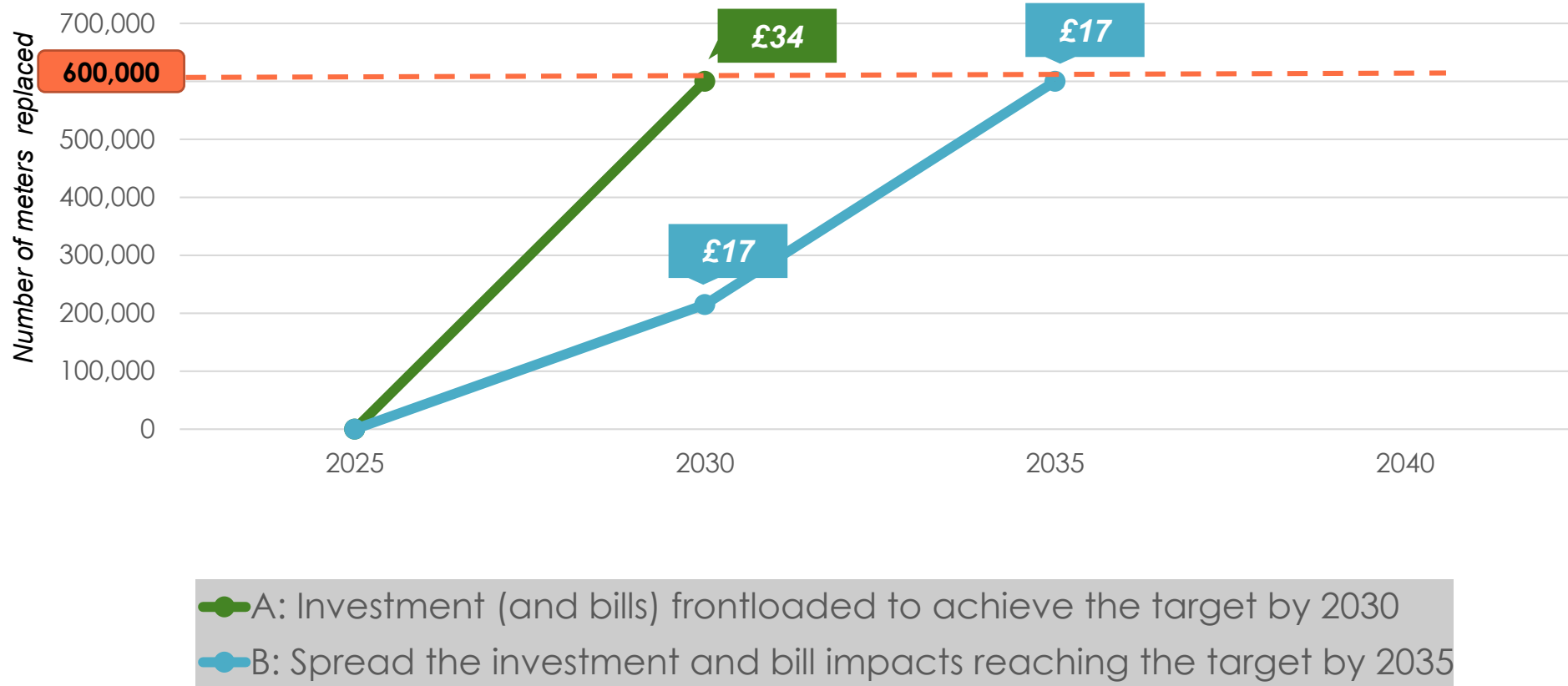
£34 per year

A is the proposed plan

B is the least cost plan

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period





2050 target:

Be a net zero carbon business by 2040

Discretionary investments
You decide

**Making all
operations net zero**

£10

Proposal for making the company's operations carbon neutral by 2030

- Moving entirely to electric vehicles
- Increasing the use of renewable electricity
- Finding the best way to reduce emissions from sewage treatment processes
- Using nature-based solutions like wetlands as an alternative to concrete structures
- Where appropriate, purchasing high-quality offsets until Wessex Water can further reduce its own emissions

Wessex Water propose to spend £37m on making all operations net zero, and this would add £10 to a £1,000 water bill.

Net zero carbon and biodiversity

The long term ambition is to be net zero (i.e. 100% carbon offset) by 2040 .

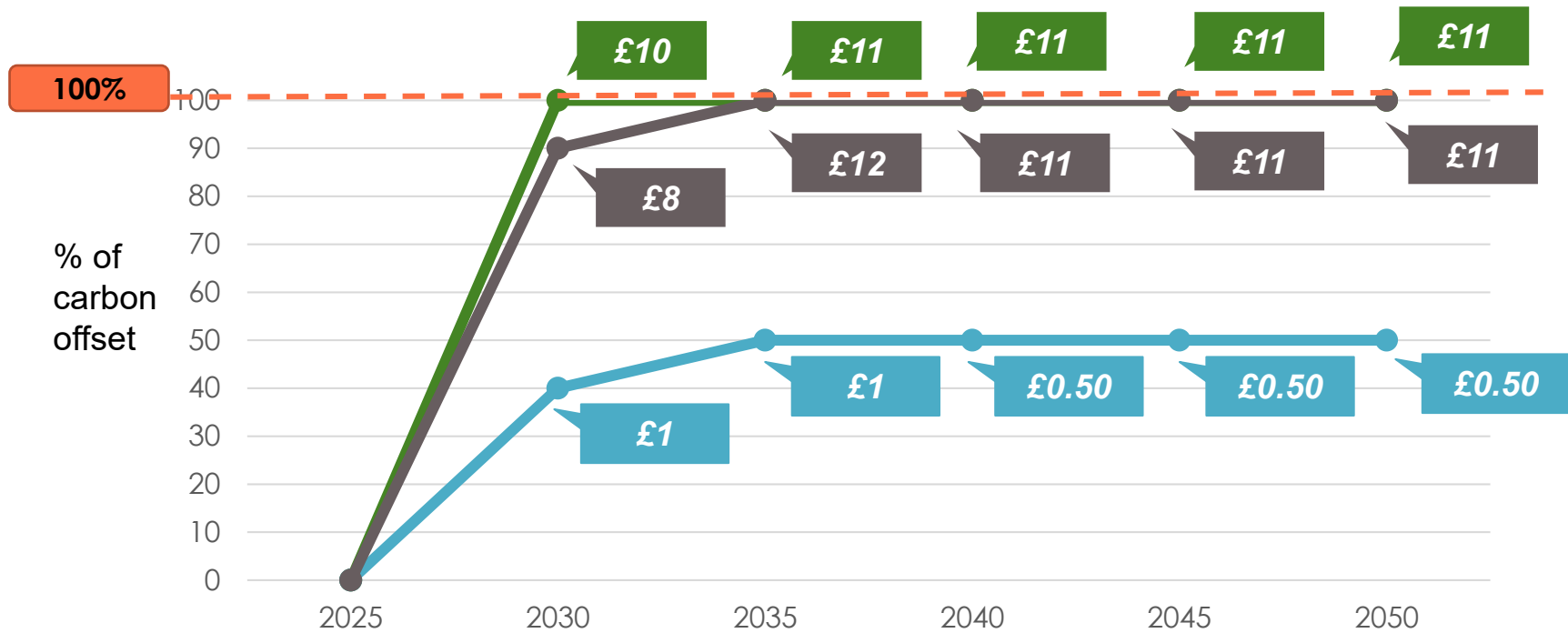
How would you like Wessex Water to pace this investment?

Discretionary investments
You decide

Making all operations net zero

£10

How each option would impact an average bill by the end of each 5-year period



A is the proposed plan.

B is the less ambitious plan

C delays investment in the short term

- A: Full operational net zero by 2030
- B: Reach 50% operational net zero by 2035 and stay at that level
- C: Delay investment: Operational net zero by 2035



2050 target:

Be a net zero carbon business by 2040

Discretionary investments
You decide

Removing micro
pollutants

£18

Proposal for improving the treatment of sewage sludge to remove micropollutants from being spread to land

- Trialling new technologies that, if they work, have the potential to turn the sludge into a material that does not have any carbon emissions (essentially an ash) which also destroy micropollutants in the sludge so these wouldn't be spread to land.
- If they work Wessex Water will implement these at scale in the future, reducing the carbon emissions and reducing the volume of the waste product we produce.
- Legislation does not currently prevent sludge being spread to land, but may do so in the future. Wessex Water propose to test new technology now and ensure it develops in case this change occurs

Wessex Water propose to spend £150m on removing micropollutants, and this would add £18 to a £1,000 water bill.

Net zero carbon and biodiversity

Discretionary investments
You decide

Removing micro pollutants

£18

A is the proposed plan.

B is the minimum requirement plan

C is a back up plan for option A

The long term ambition is to be a net zero business by 2040.

How would you like Wessex Water to invest?

A Proposed:

Trialling & implementing new technologies to turn the sludge into a material that does not have any carbon emissions & also destroys micropollutants in the sludge such as microplastics so these wouldn't be spread to land.

B: 'Least cost' option:

- Continue to spread sludge to land by building more storage barns to cope with increasing volumes.
 - Test new sludge treatment technologies in the near term in readiness for any future legislation changes, but not roll these out.
- NB This option does not reduce carbon impact nor provide a new way to dispose of sludge.

C - Back up: If proposed plans don't work – and the ability to spread to land is significantly reduced, Wessex Water would have to install (carbon intensive) incinerators and dryers at some sites to burn the sludge. This would remove the micropollutants in the sludge

Bill impact by end of each 5 year period



An effective sewerage system

Discretionary investments
You decide

Reducing sewage
spills in a further 45
locations

£27



2050 target:

To halve the number of sewer flooding incidents.

Proposed plan for reducing sewage spills in a further 45 locations - by 2030

- Increase investment in this area from £500 million to £734 million over the five years between 2025 and 2030
- Start with storm overflows that discharge most frequently and those that have any environmental impact
- Work with communities to fit sustainable drainage solutions like soakaways
- Increase environmental and public health monitoring at key locations
- Use artificial intelligence to manage the sewerage network and provide real time bathing water information

Wessex Water propose to spend £250m on reducing sewage spills in a further 45 locations, and this would add £27 to a £1,000 water bill.

An effective sewerage system

Discretionary investments
You decide

Reducing sewage spills in further 45 locations

£27

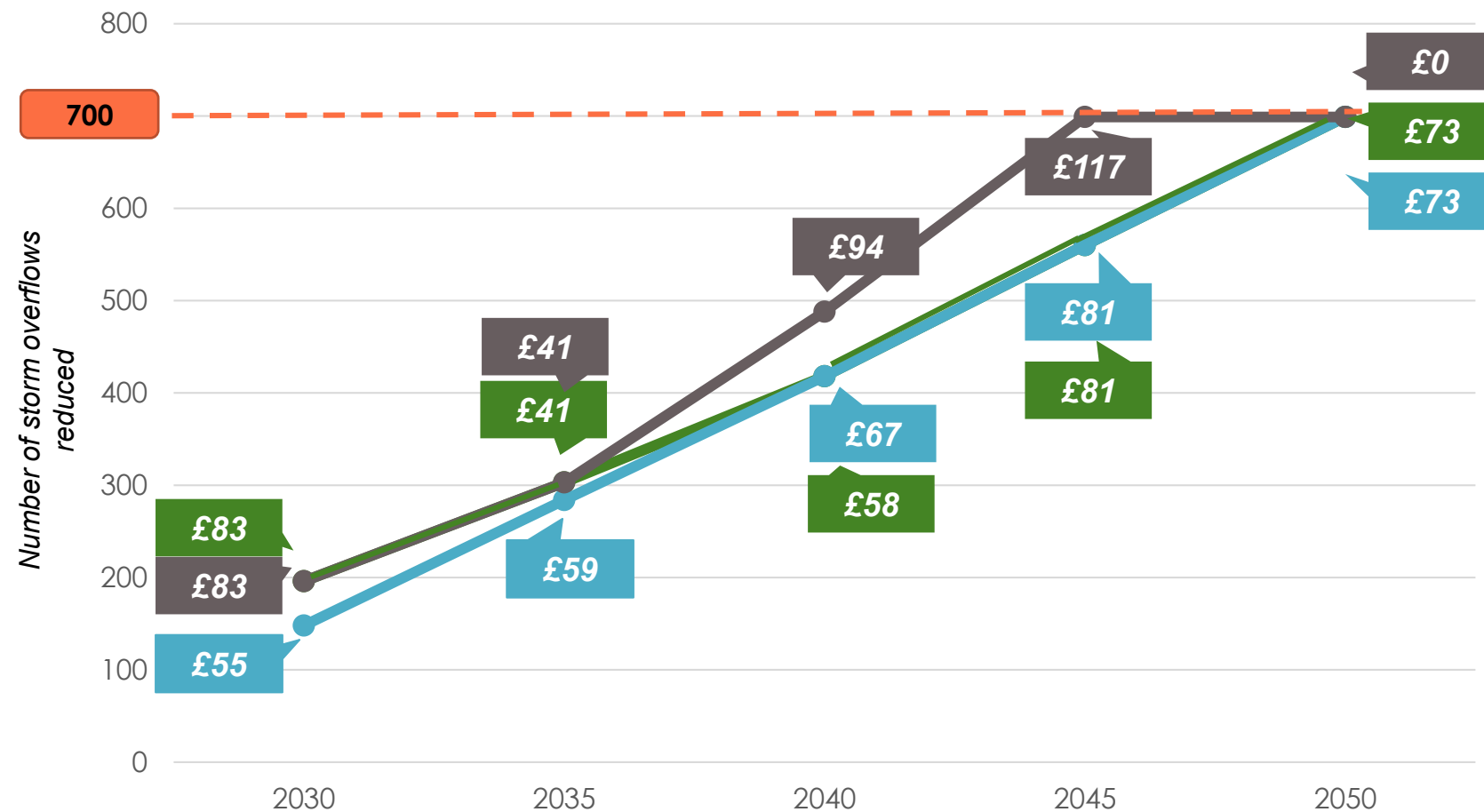
A is the proposed plan.

B is the legally required plan.

C accelerates the delivery to 2045 instead of 2050

The long-term ambition is for the spills from almost 700 overflows to be reduced in line with 2050 legislative targets

How would you like Wessex Water to pace this investment?

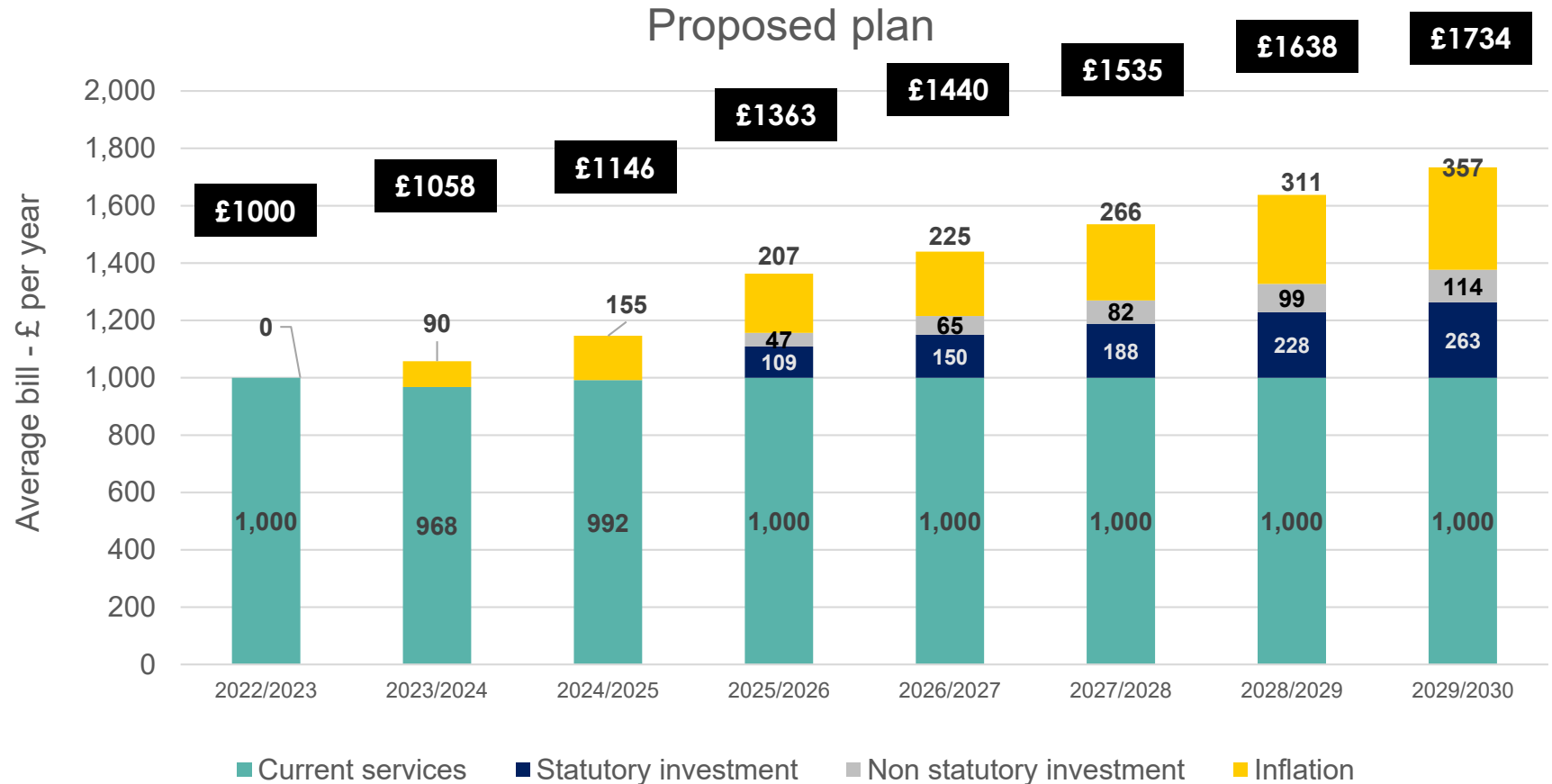


- A:** Proposal is to move faster than legal requirement, adding another £11 to 2025-30 bill
- B:** Least cost (legally required) plan - this £23 impact already covered earlier
- C:** this plan accelerates meeting the target - almost 700 storm overflows reduced by 2045

What would this proposed plan cost?

When you add the investment in each area, a £1000 bill will increase by £61 a month (£732 a year) by 2030. This includes:

- £22 a month of investment that regulators say we must make (statutory investment)
- £9 a month of investment that we want to make to maintain and improve our services to you, and
- £30 a month of inflation.



NB You will see a personalised bill prediction at the end of the session

**‘Must do’
business plan**

2050 goals



2050 goals

Effective sewerage system

Halve the impact of sewer flooding on our customers



Longer term investments:
your input on how & when

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Trial smart meters ahead of rollout

£17

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Biodiversity

Double our contribution to the region's biodiversity



Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.

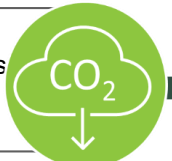


Replace 6,000 lead pipes

£2

Net zero carbon

Be a net zero carbon business by 2040



Delay net zero investment

£1

Barn storage for sludge

£12

There are 6 areas where Wessex Water can reduce the cost of the plan

It can **delay smart meter rollout**. A small investment in trials could mean a more successful rollout to be complete by 2040 (not 2030)

It can reduce **lead replacement** from 12,000 pipes to 6,000 by 2030

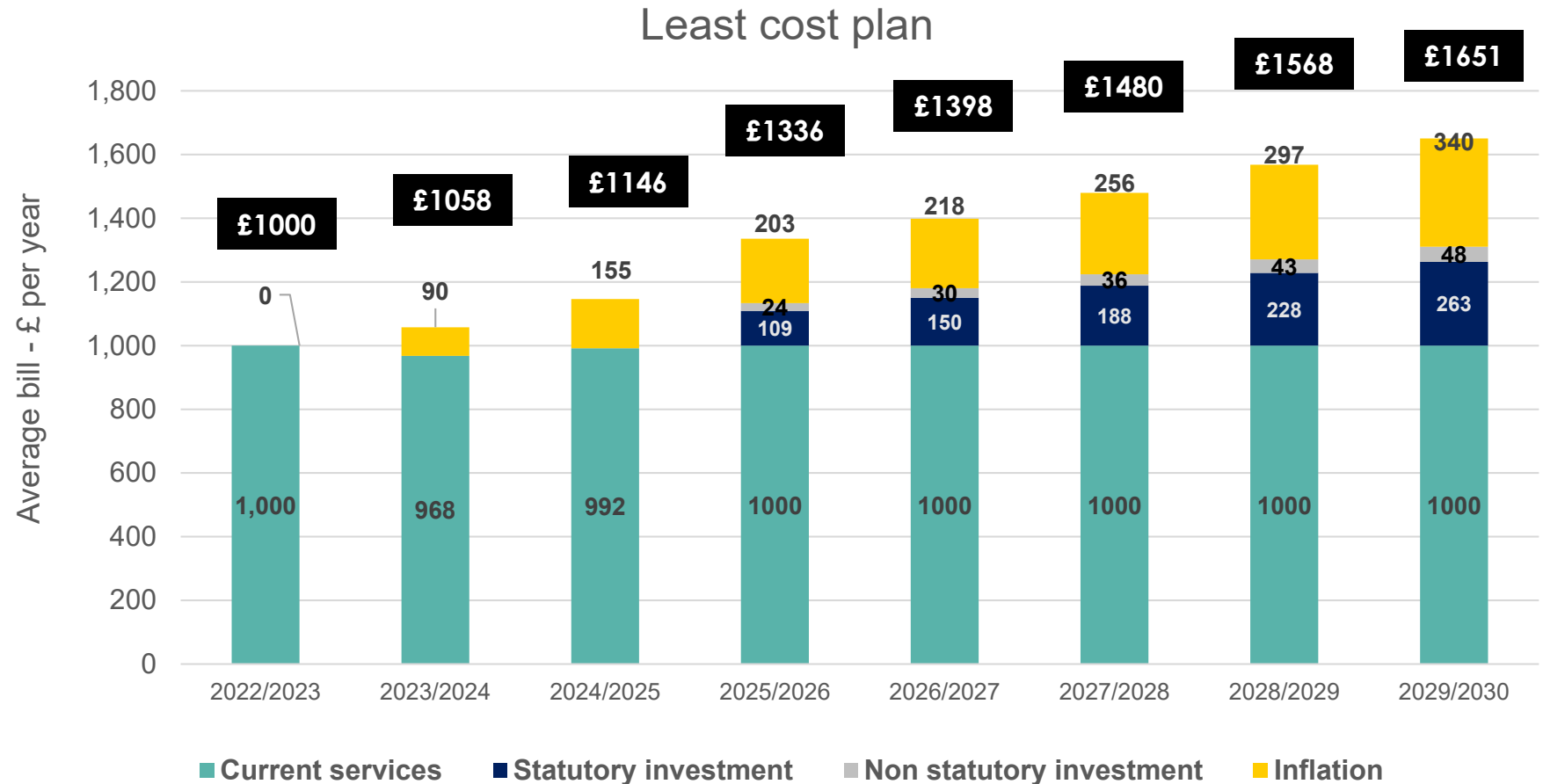
It can **delay its net zero plans** by not building the electric vehicle infrastructure or offsetting anything it cannot reduce itself. It will reach 40% net zero by 2030 instead of 100% as proposed.

It can **manage sludge** with storage barns rather than finding permanent alternatives

What would this 'must do' plan cost?

When you add the investment in each area, a £1000 bill will increase by £54 a month (£648 a year) by 2030. This includes:

- £22 a month of investment that regulators say we must make (statutory investment)
- £4 a month of investment that we want to make to maintain and improve our services to you, and
- £28 a month of inflation.



NB You will see a personalised bill prediction at the end of the session



Summarise your views in the
post-group survey.

Thank you!



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ACCEPTABILITY & AFFORDABILITY DISCUSSION GUIDE MODERATOR GUIDE

Overview

<ul style="list-style-type: none"> • 2 x 1.5 hours online focus groups with non-household customers • Company/CCG representatives to attend – primarily in observation role
--

SESSION 1 – 90 mins		
	15 mins	Welcome & Introductions
	15 mins	An introduction to the water company i
	20 mins	An introduction to the water company ii
	15 mins	Focus on the long term picture
	20 mins	Overview of Proposed plan
	5 mins	Wrap up
SESSION 2 – 90 mins		
	10 mins	Welcome and recap on previous session
	20 mins	Focus on legally required investments (PROPOSED)
	25 mins	Focus on discretionary elements (with phasing)
	5 mins	Bill impacts
	15 mins	Alternative shorter-term picture (MUST-DO)
	5 mins	Bill impacts
	10 mins	Wrap-up, post task & thank you

Welcome & Introductions (15 mins)

Aim: welcome everyone to the session, introduce Blue Marble and observers and set out expectations of the event

- Ensure participants have turned on cameras and microphones, and troubleshoot any tech issues
- Welcome everyone to the event.
- Introduce Blue Marble and explain that we are an independent research agency.
- Explain: Confidentiality, GDPR, recording, how data will be used.
- Objective for the session: to help Wessex Water make important investment decisions.
- Role of respondents:
 - Asking people to act as representatives of the business community of the Wessex Water region;
 - There are no right or wrong answers we just want to hear people's open and honest views;
 - We will provide lots of information and expect much of it will be new to them – encourage people to ask questions.

Observers/Wessex Water representatives (CCG): each to briefly introduce self – name, job title and 1 sentence summary of role/responsibilities – then turn cameras off.



Discussions

Introductions

Each respondent to introduce self:

- Name, nature of business,
- Current challenges in operating environment
- Perspective on the economic climate: is it getting better or worse?
 - If not improving, when do you anticipate the financial situation will start to improve?
- How are you feeling about the financial situation looking into the future:
 - In the next 5 years?

An introduction to the water company i (15 mins)

Moderator: to very briefly recap pre-task **SLIDES xxx**

SLIDE x: This first slide shows us all the water companies that operate across England and Wales. It is important to note that water companies operate regionally. This is why it is a chance for customers to have their say. Some companies provide just water supplies, others provide both water and sewerage services. While households don't choose their water provider – businesses can choose their water and waste water retailer but are still supplied by the water company (otherwise known as the wholesaler) in the region.

SLIDE x: This is a close up of the **Wessex Water** region – and it gives us a sense of the scale of the operation. **Wessex** is one of the companies that provides both sewerage and water supply. It provides sewerage services to the whole of the region, that's about **3m** people. The yellow areas are where another company supplies the water. **Wessex** supplies the water to around 1.4 million people - shown in blue. Wessex Water employs 2,700 people who deliver these services. It's important to note that while businesses in the region are supplied by Wessex Water, the retailer bills and provides customer service to businesses.

SLIDE x: This slide explains why the research is happening. It is all to do with the way water companies plan ahead in a process called the Price Review.

Every five years, water companies develop a 'business plan' that sets out how they want to develop their services, and the proposed cost to customers. As we've seen, customers are not able to choose their water provider, so water companies must give them a say about what they want from their services and the price they pay. Talking to customers through research also helps water companies prioritise what to do first or what to do most of. In this session we'll be looking at some of the choices they face – and where they want your input.

SLIDE x: Water companies are regulated. This research is part of the regulatory process. The business plan we'll be looking at - and the cost of the investments which impact on customer bills - are **finalised by Ofwat**. One of the ways that people have their say is through research like this. We'll be asking what you think about the plans: are they '**acceptable**' to you and are they **affordable**. The plans we show you will be refined following this research based on what customers have to say.



SLIDE x: Here we see all the things a water company like **Wessex Water** does. We are showing you this because the plans relate to all of the aspects of their work.

SLIDE x: All of these aspects are overseen by regulators. We have mentioned Ofwat already who oversee the financial operation of water companies and measure customer satisfaction. The Environment Agency monitors all the areas that could have a detrimental impact on the environment if not conducted properly.

The Drinking Water Inspectorate monitors water quality.

Discussions:

- Awareness and experience of the water company
 - How much of this is new information for you?
 - What contact do you have with your water company and retailer?
- Understanding the role of water companies
 - Were there any surprises in terms of what they do as a business?
- Participants' sentiment towards their water company
 - What kind of relationship do you have with your water company?

An introduction to the water company ii (20 mins)

SLIDE xx: This slide shows us what your bill pays for.

- Any comments

SLIDE x: The next information is about the way water companies are monitored, specifically by Ofwat.

We are told about the service level targets, called 'performance commitments', which are set for every five-year business plan. Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

SLIDE x: Companies can miss or exceed performance commitment targets and this has a direct impact on customer bills because of the way Ofwat rewards or penalises companies

SLIDE x Last year **Wessex Water** passed 31 and failed 11 performance commitment targets earning them an overall reward of £5.2m. The way the reward is paid is via customer bills (and last year this equated to £12 per customer that **Wessex Water** could add to bills because it performed better than the required level). However with bills already increasing it has deferred this reward so customer bills have not increased to pay for it. Hopefully now you have a sense of how the water market works, that it is regulated – and that its performance is closely monitored by the various regulators.

SLIDE x The remaining information is the performance of **Wessex Water** against all the other water companies. As I show you each slide, consider where you would want – or not want - to see further investment in future plans

- **SLIDE x:** In terms of supply interruptions, **Wessex Water** performed better than the target set by 32%



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- **SLIDE x:** In terms of water quality, its appearance, taste and smell, Wessex Water is more or less on target
- **SLIDE x:** For the target about sewage flooding in properties, Wessex Water is exceeding its target
- **SLIDE x:** For sewage flooding outside the home in gardens or outbuildings, it is not meeting its target
- **SLIDE x:** For reducing leaks, it has exceeded its target
- **SLIDE x:** And in terms of pollution of rivers and bathing areas, it is exceeding its target

Discussions:

- Thinking about what was just presented, which areas matter most to your business/organisation?
 - Why?
 - Are there any areas that don't really matter to your business/organisation at all?
- Where do you think investment and improvement is most needed?
- Thinking about all the water and wastewater services that Wessex Water provide for your business/organisation and thinking about your bills:
 - What do you think of the value for money of the service you receive from your wholesale water and sewerage services?
 - In what ways are they providing good value?
 - In what ways are they providing poor value?

SLIDE xx Here we see the 6 key performance targets again and the investment level proposed for the 2025-30 period

How do you feel about the targets set? Bear in mind the current performance level (refer to pre-read graphs as necessary)

- Have you got any questions or comments on any of the targets?
- Do any seem too ambitious?
- Do any seem not ambitious enough?
- What are your initial thoughts on the proposed bill changes?
- Generally, do you want to challenge any of these targets?
 - If challenge: what would you like to see changed?

Focus on the long-term picture to 2050 (15 mins)

Before we get into the detail of the investment plans for the next 5 years, we need to understand what Wessex Water is trying to achieve in the long term. The next slides are to give you a bit more context for this research.

SLIDE x: There are some challenges that all water companies have to factor in to their longer term plan:

- The impact of a changing climate: more extreme weather predictions mean that water companies will need to manage more frequent drought periods and the risk of



more intense rain and flooding. Their plans include ways to adapt to climate change and become a net zero business.

- The pressures that come with a growing population: this means increasing the water and wastewater networks to accommodate new housing developments and building new sustainable ways to capture storm water to prevent it overwhelming the drains and sewers – especially necessary in built up areas.
- Some new laws and regulations: all water companies have to comply with environmental laws in England. They also have to consider how climate change and population growth affect current and future capacity of sewage and rainwater drainage networks. These cover a range of areas including:
 - Reducing pollution of seas and rivers from sewage overflows.
 - Not taking too much water from rivers and from underground to protect the ecology.
 - Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
 - Treating water and wastewater to a standard that does not harm the natural environment.
 - Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.
- And then there's the economic situation – the cost of living crisis and high inflation. Also the rising costs for businesses.

SLIDE 31: Wessex Water has 8 outcomes which are its ambitions or goals for 2050.

Discussion

- What do you think about the long-term plans Wessex Water have set out?
- Which one or two outcomes matter most to your business/organisation – probe why
- Which matter least? Why?
- These ambitions sit in the 2050 timeframe (or 2040 in the case of net zero) but which would you like to see achieved sooner than 2050? Probe why.
- Which do you think are most urgent to achieve?
- Which are least urgent? Why?

Introduce shorter-term (proposed business plan) – 20 mins

SLIDE xx There are 2 plans that we will be showing you. The 'Proposed' plan includes extra work over and above what they are required by law - to provide extra benefits to customers, the environment and local communities. We will also be showing you a second plan which we are calling the 'must do' plan. It allows Wessex Water to just carry out the work that they are required to do by law – and would have the lowest impact on customer bills.

I'm just going to clarify the 3 types of investment for you to consider... **SLIDE 35** These are:

SLIDE xx This is the one page plan you saw in the pre-read. MODERATOR: talk through the slide:

- The key investments relate to the long term outcomes (in colour)



BLUE MARBLE

- **Dark blue** are the elements that are legally required of all water companies. We'll briefly tell you about these as they will impact bills – but there isn't and say in these investments
- **In grey** are the performance commitments that we've been looking at already. We'll be asking you if you are happy with the targets that they are proposing for the next 5 years
- **In white** are the additional investments that will help them meet their long term goals for 2050. Here you will be shown some options to choose from depending on how you think they should balance this spend over the next 25 years

Discussion

What are your initial reactions to the type and cost of investments that are proposed?

- Initial reactions to the investment areas:
 - How do these fit with expectations?
 - Any surprises?
 - Any concerns?
 - How acceptable does the plan look (if cost isn't in the equation)
- What are your initial thoughts on the proposed bill changes?
 - How acceptable is the plan once you can see the cost impacts?
 - How affordable is this for businesses?

Wrap up session 1 – 5 mins

Thank you very much for all of your input so far. We really appreciate your time and engagement. We look forward to seeing you next week at the same time. You will have received an invitation for next week's session



PART 2

Welcome & Introductions plus brief recap on previous session (10 mins)

Welcome everyone to the session, introduce observers and set out expectations of the event

HIT RECORD

- Ensure participants have turned on cameras and microphones, and troubleshoot any tech issues
- Recap briefly
 - The long term picture to 2050 (Slide xx)
 - Introduction to proposed business plan (Slide xx)
- Explain that we are going to share more detail behind the investments so that they can consider the proposals in more detail

Focus on legally required investments (20 mins)

We'll start by showing you the legally required investments:

Moderator refer to **SLIDE xx**: the first investment relates to **making the sewer system more effective and supports the long term target to reduce the number of sewer flooding incidents by half**. We are given some background information here about why the investment is needed – and that it will increase bills by **£55** per year between 2025-30.

- How do you feel about the mandatory target set for **Reducing the number of sewage spills**?
 - Do they feel too ambitious/not ambitious enough/about right?
- What are your initial thoughts on the proposed **£55** bill changes?
 - Does this seem reasonable?
 - Is it affordable?
- Do you feel this will support the longer term ambition /2050 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Moderator refer to **SLIDE xx**: this is the other mandatory investment we are shown today.

- How do you feel about the mandatory target set for **Nutrient removal and river water quality monitoring**?
 - Does it feel too ambitious/not ambitious enough/about right?
- What are your initial thoughts on the proposed **£111** bill changes?
 - Does this seem reasonable?
 - Is it affordable?
- Do you feel this will support the longer term ambition /2050 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Focus on discretionary investments (30 mins)

SLIDE xx now we are moving onto look at the **5** longer term investments where customers have a say in how and when these investments are planned between now and 2050.

SLIDE xx: one aspect we will be discussing when looking at the long term investments is how they phase spending – we particularly want your input here because this will have direct consequences for customer bills.



MODERATOR to talk over the 3 examples: *The way companies implement their long term investments will have an impact on who pays. Each scenario equates to the same overall bill amount – the difference is when the investment happens – and who ultimately pays.*

- *The first scenario is for steady rises which will affect current and future customers similarly.*
- *In the second scenario, bills would rise more sharply now so that everyone benefits as soon as possible from the improvements. This will mean increasing bills for today's customers (even though they may not benefit from the investments).*
- *In the third scenario, bills would be kept down as the company would delay investing. They will still meet the long term goals but it means the benefit of the investments come later - and future customers will make the biggest contribution through bills.*

Discussions

- What is best for them as business customers?
- What is fairest for all current and future customers?
- What is best for society?

First I'll read out some background about an additional investment replacing lead pipes

- *Properties built before the mid 1970's may have a lead service pipe. Lead was banned as plumbing material in the 70's. The World Health Organisation state there is no safe level for lead in drinking water*
- *In areas where there are lots of properties with lead service pipes, water companies dose the water with phosphate to reduce lead being picked up in the drinking water*
Wessex Water have a programme of lead pipe replacement to improve water quality.
- *It encourages anybody with lead pipes in their home to get them replaced. Between 2020-25 Wessex replaced 9,000 lead pipes. It proposes to continue with further lead pipe replacement and also offer a grant to customers if it can't replace the lead pipes for any reason*
- *Anybody who has a concern about lead can ask for a water quality sample to be taken*

SLIDE xx Show target summary (big screen)

SLIDE xx Phasing lead pipe investment: this shows 3 options for reaching the long term goal. We've been looking at option A/the proposed plan. Wessex Water could take the least cost approach (spend less now) or they could accelerate investment (spending more now).

Discussions (5 mins)

- How do you feel about the proposed target (which is discretionary) set for lead pipe replacement?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /2040 target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?



Now I'll read out some background about an additional investment for smart meters

The Wessex Water area has been designated as an area of 'water stress' – meaning it can compulsorily meter all properties. Like leakage, reducing the amount of water customers use in their home (or business) will reduce the amount of water taken from the environment.

Today, just over 70% of households have a basic water meter used to generate the water bill every 6 months – none have smart meters.

Smart meters read usage several times a day and can be used to spot leaks around or within the home (e.g. leaking toilets and taps) more quickly than a basic meter could which means they can be fixed quicker too and reduce water wastage.

Through more regular billing and/or via an app, customers can have more control over their bill by finding ways to change their water using habits

SLIDE xx Show target summary (big screen)

SLIDE xx Phasing **smart meter** investment: this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach (spend less now) or they could accelerate investment (spending more now).

Discussions (5 mins)

- How do you feel about the proposed target (which is discretionary) set for **smart meters**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Now I'll read out some background about an additional investment for making operations net zero

Wessex Water uses carbon to run its sites, fuel to run vehicles and chemicals to treat water. It also emits greenhouse gases when it treats sewage. It can reduce emissions through generating greener electricity on site and reducing energy and chemical use.

It is also moving towards greener treatment processes, where possible

SLIDE xx Show target summary (big screen)

SLIDE xx Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. Wessex Water could take the least cost approach or they could accelerate investment.

Discussions (5 mins)

- How do you feel about the proposed target set for **making operations net zero**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?



Now I'll read out some background about an additional investment relating again to carbon reduction and biodiversity

Sewage sludge is disposed of as fertiliser but it creates carbon emissions when spread on land and potentially leaches micropollutants into the water environment.

Wessex Water needs to reduce these emissions. Furthermore they may not be allowed to spread sludge to land in the future. This will have a big impact as they will need to dispose of the sewage sludge in another way.

SLIDE xx Show target summary (big screen)

SLIDE xx Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. **Wessex Water** could take the least cost approach or they could look at an alternative investment.

Discussions (5 mins)

- How do you feel about the proposed target set for **improving the treatment of sewage sludge to remove micropollutants from being spread to land**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

Now I'll read out some background about an additional investment further reducing the number of sewage spills?

- NB Moderator refer to plan on a page and the mandatory investment so that respondents understand this is in addition to what was discussed earlier

SLIDE 52 Show target summary (big screen)

SLIDE 53 Phasing this shows 3 options for reaching the long term goal. We've been looking at **option A**/the proposed plan. **Wessex Water** could take the least cost approach or they could accelerate investment.

Discussions (5 mins)

- How do you feel about the proposed target set for **further reducing the number of sewage spills**?
 - Does it feel too ambitious/not ambitious enough/about right?
- Which option do you think is best and why?
- Do you feel this will support the longer term ambition /**2040** target?
- Generally, do you challenge this part of the plan, or do you accept it?
 - If challenge: what would you like to see changed?

- *SLIDE xx* **proposed bill change based on an average non household bill of £1,000** (explaining that they will see a personal bill prediction later on for them to respond to)



Discussions

- Response to overall bill impact
 - Acceptability of the plan?
 - Affordability of the bill?
 - Which aspects endorse?
 - Which aspect challenge?

Focus on the shorter-term (MUST-DO business plan) – 20 minutes

SLIDE xx & xx Introduce overview and summary of the 'must-do' business plan

- Talk through the 5 areas that will revise the bill changes down (*STIMULUS least cost alternative*)
- *SLIDE xx proposed bill change* based on the average household bill (explaining that they will see a personal bill prediction later on for them to respond to)

Discussions

- How do you feel about the 'least cost/must do' plan
- Which of the 5 areas are you least willing to compromise
- Which are you most willing to forego?

How does this plan impact your business/organisation?

- *SLIDE xx proposed bill change* based on an average non household bill of £1,000 (explaining that they will see a personal bill prediction later on for them to respond to)

Discussions

- Response to overall bill impact
 - Acceptability of the plan?
 - Affordability of the bill?
 - Which aspects endorse?
 - Which aspect challenge?

Wrap up and post-task – 10 minutes

Thank you very much for all of your input so far. We really appreciate your time and engagement.

To round things up, we'd like you to complete a short questionnaire about some of the things we have discussed today.

Explain process.

NHH FOCUS GROUP

Online – part 1

May 2023



An introduction to water and wastewater services

There are 11 water companies that provide **both water and sewerage services**

There are also 5 companies that provide **water services only**

Some premises have 2 separate suppliers e.g. customers in Bristol receive **water services from Bristol Water** and **sewerage services from Wessex Water**

Water companies are regional: people and businesses have to receive water services from the company that covers where they live

Unlike household customers, business customers can choose their water and sewerage retailer. The retailer provides billing services and is the first point of contact for business customers for all service matters.

The water companies (also known as the 'wholesaler') manage the water and sewerage services.



Wessex Water provides essential water services across Somerset, Wiltshire, Dorset, Bath & Bristol.

- It directly employs over 2,700 people

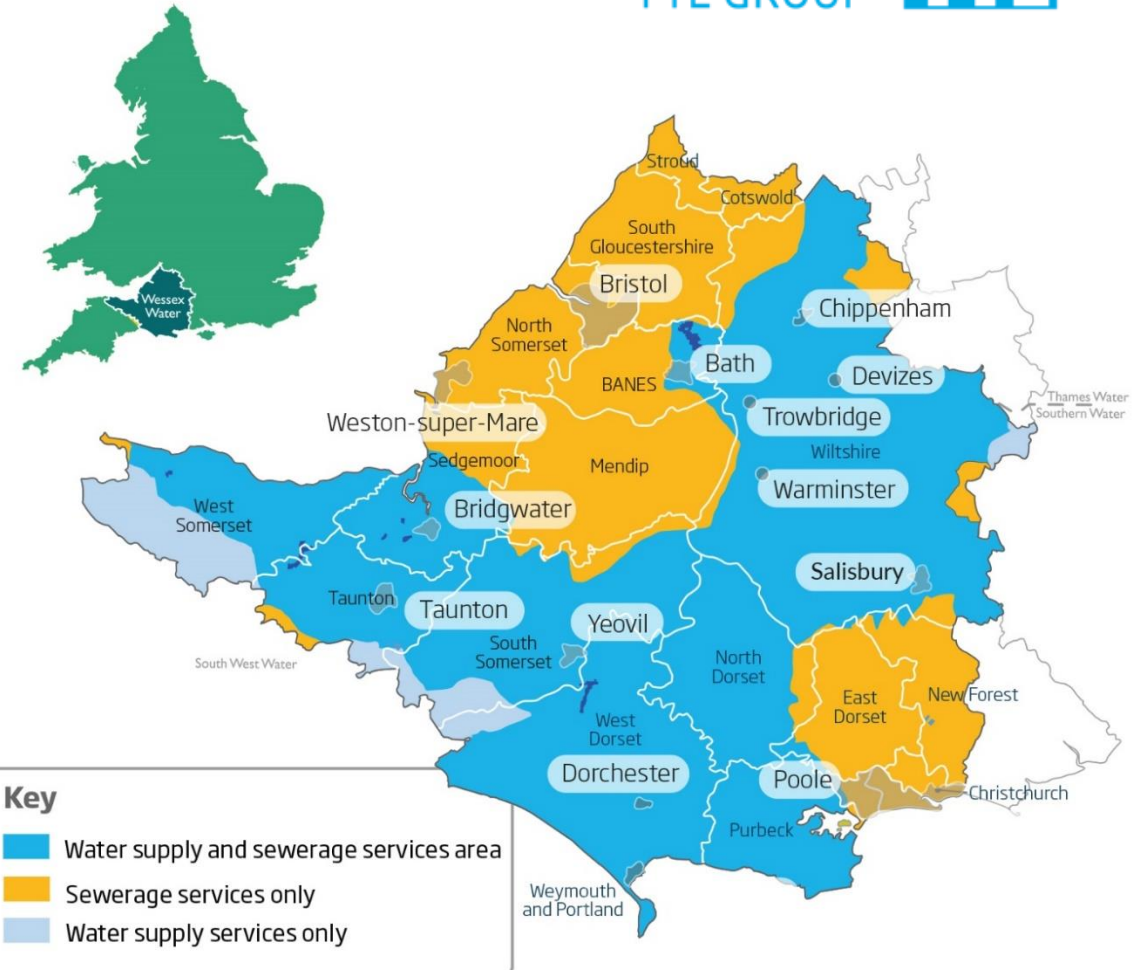
It provides sewerage services for the whole region:

- Approx. 2.9m people and 57,000 businesses

It provides water supply services for all areas excluding Bristol Water and Bournemouth Water areas:

- Approx. 1.4m people and 44,000 businesses

Businesses in the region receive water from Wessex Water, but primarily deal with their retailer who bills them and provides customer services.



Every five years, **water companies develop a 'business plan'** that sets out how they want to develop their services, and the proposed cost to customers.

As customers are not able to choose their water company, water companies must give them a say about **what they want from their services and the price they pay.**

Talking to customers also helps water companies **prioritise what to do first or what to do most of** – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.





The business plan and prices are then **finalised by Ofwat** in a process known as the Price Review. There is more information about this here: 'All about the price review'.

Available at:

<https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are **'acceptable'** to you and whether you can **afford** the proposed bills from 2025-2030.

Companies also have to show to Ofwat that their **plans reflect what their customers want** – that means refining the plans based on what customers tell them.





Water services



Wastewater services



2. Clean water supplied to customers



3. Customers receive a safe supply of water



4. Customers flush waste water



5. Wastewater is collected and piped to sewage pumping stations



1. Water is collected from groundwater, reservoirs or rivers and treated



6. Wastewater treated at recycling centres & returned to the environment

The role of the retailer
7. Customer services and billing



1.
Water is collected
groundwater,
reservoirs or
rivers and treated

2.
Clean water
supplied to
customers

3.
Customers
receive a safe
supply of water

4.
Customers
flush waste
water

5.
Wastewater is
collected and
piped to sewage
pumping stations

6.
Wastewater treated
at recycling
centres & returned
to the environment

Water quality
monitored by Drinking
Water Inspectorate

Satisfaction
monitored by Ofwat

Activities monitored
by Environment
Agency

The role of the retailer
**7. Customer services and
billing**

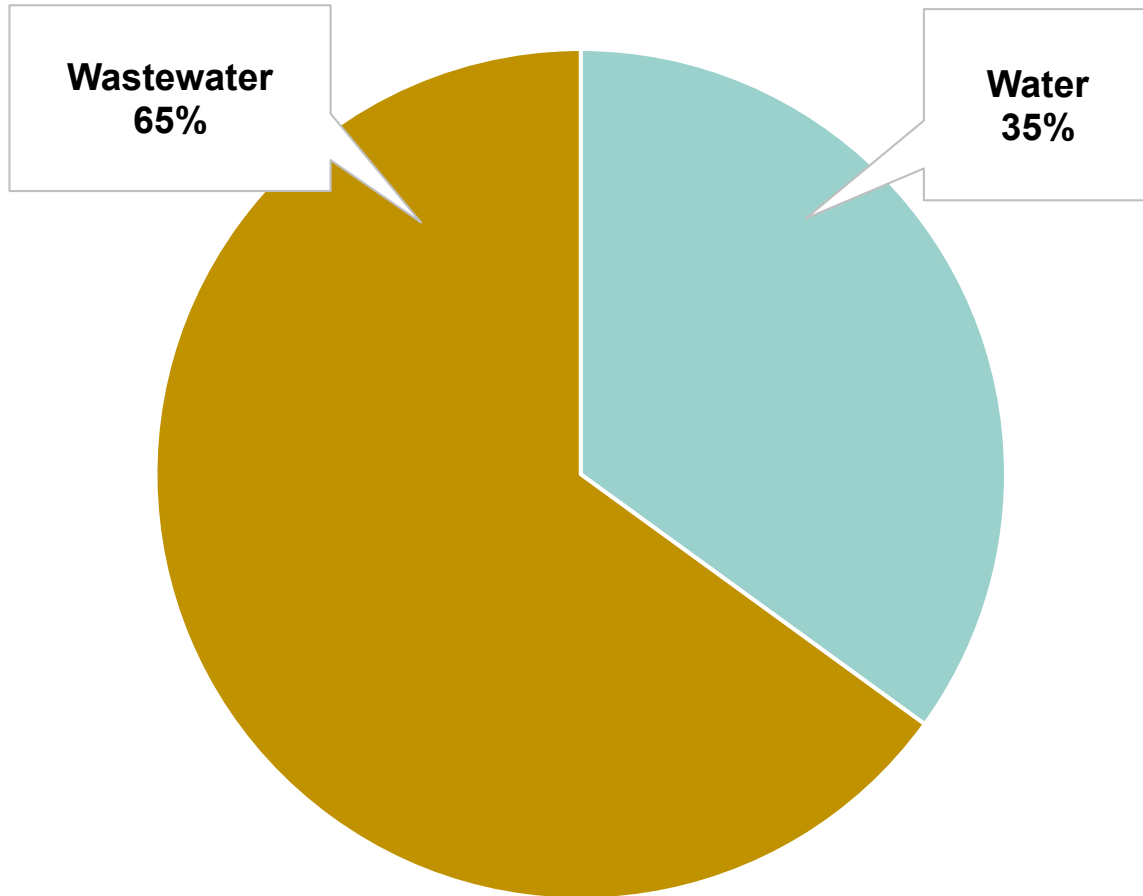




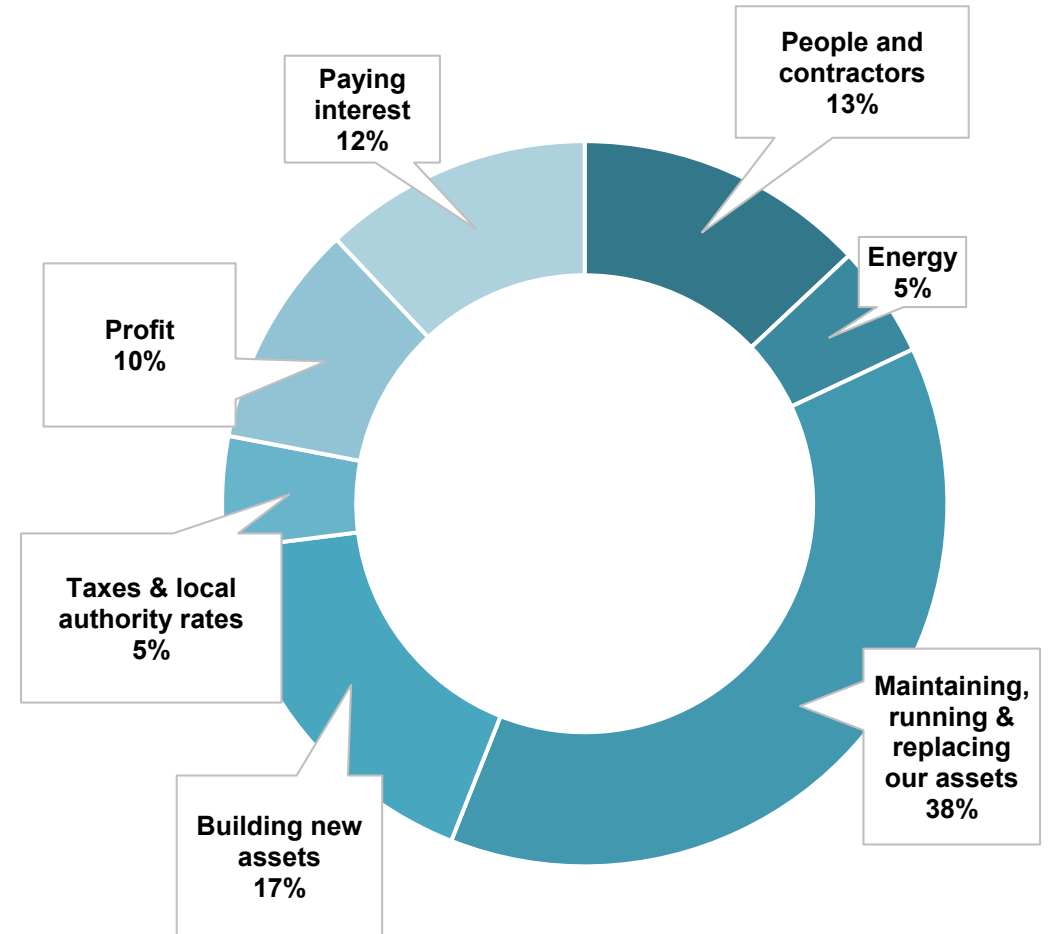
What impressions do you have
of your water company?

Bill breakdown

Split for every £1 spent for an average customer



How the bill breaks down



Water companies are currently part way through their five-year business plan for 2020 to 2025. They have **service level targets, called 'performance commitments'**, in every five-year business plan.

These **targets are based on what customers have previously told companies they would like them to do**, and on Ofwat's assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

We are now going to show you how well your water and/or sewerage company is doing on some of their performance commitments, compared to other water companies in England and Wales. These performance commitments are a snapshot of out of the wide range of services companies provide. We are showing these examples as customers have told us they are particularly important to them.

Water companies have to provide **reliable services**, and plan for their services to be **resilient** to changing weather patterns and demand from consumers.

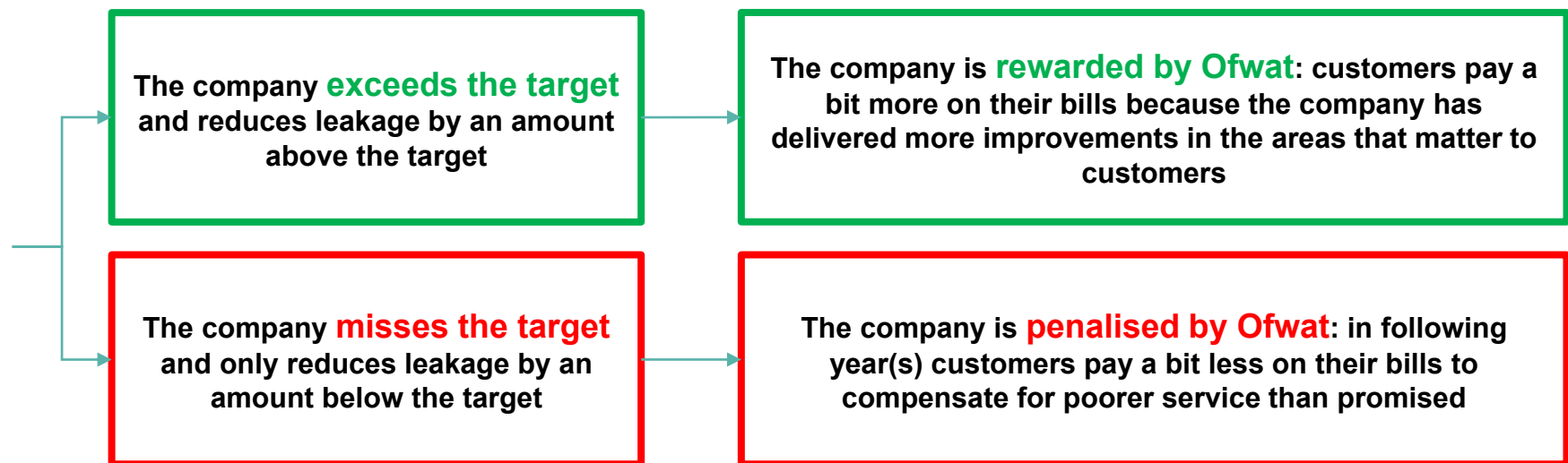
Companies can **miss** or **exceed** **performance commitment targets** for a number of reasons.

For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets

Example:

Water company sets a performance commitment based on customer priorities:

To reduce leakage from water mains and pipes





How has my bill been affected by Ofwat's penalties and incentives?

- Last year Wessex Water **passed 31** and **failed 11** performance commitment targets (with 2 neither passing or failing) earning them an overall reward of **£5.2m** that they could receive via customer bills (which would equate to £16 per business customer)
- However with bills already increasing it has deferred this reward so customer bills have not increased to pay for it.

PART TWO

Next we are showing you how Wessex Water performs in relation to other water companies across England and Wales

- The water industry uses a number of measures to assess performance. Because the water companies are very different in size and number of customers, these measures are often 'normalised' to give a fair comparison
 - E.g. on the next slide you'll see information about the number of minutes properties are without water per property per year. This is an average: in reality, most houses don't experience problems but some will be without water for longer periods. But to be able to compare companies, the total interruption time is divided by all properties in the region
- Please read the information and consider where you are happy with Wessex Water's performance – and where you would like to see improvements.

Water supply interruptions, without warning, for over 3 hours

If a water supply is interrupted without warning for over 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

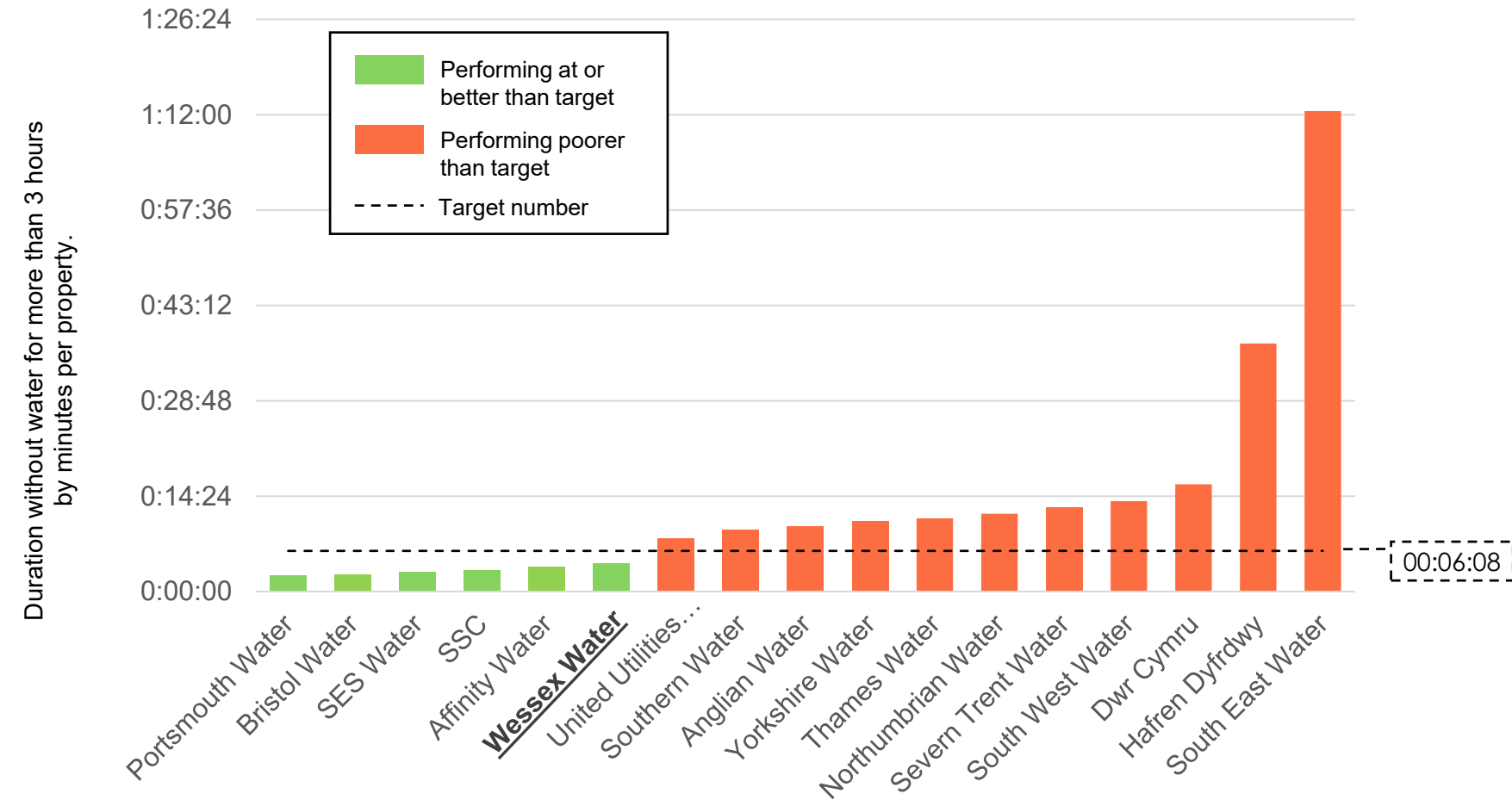
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-62%
Bristol Water	-59%
SES Water	-52%
SSC	-47%
Affinity Water	-39%
Wessex Water	-32%
United Utilities Water	+30%
Southern Water	+53%
Anglian Water	+60%
Yorkshire Water	+73%
Thames Water	+80%
Northumbrian Water	+92%
Severn Trent Water	+106%
South West Water	+123%
Dwr Cymru	+164%
Hafren Dyfrdwy	+511%
South East Water	+1083%

Water companies measured on the length of time properties are without water.



Duration without water for more than 3 hours
by minutes per property.
(A lower bar / number is better.)



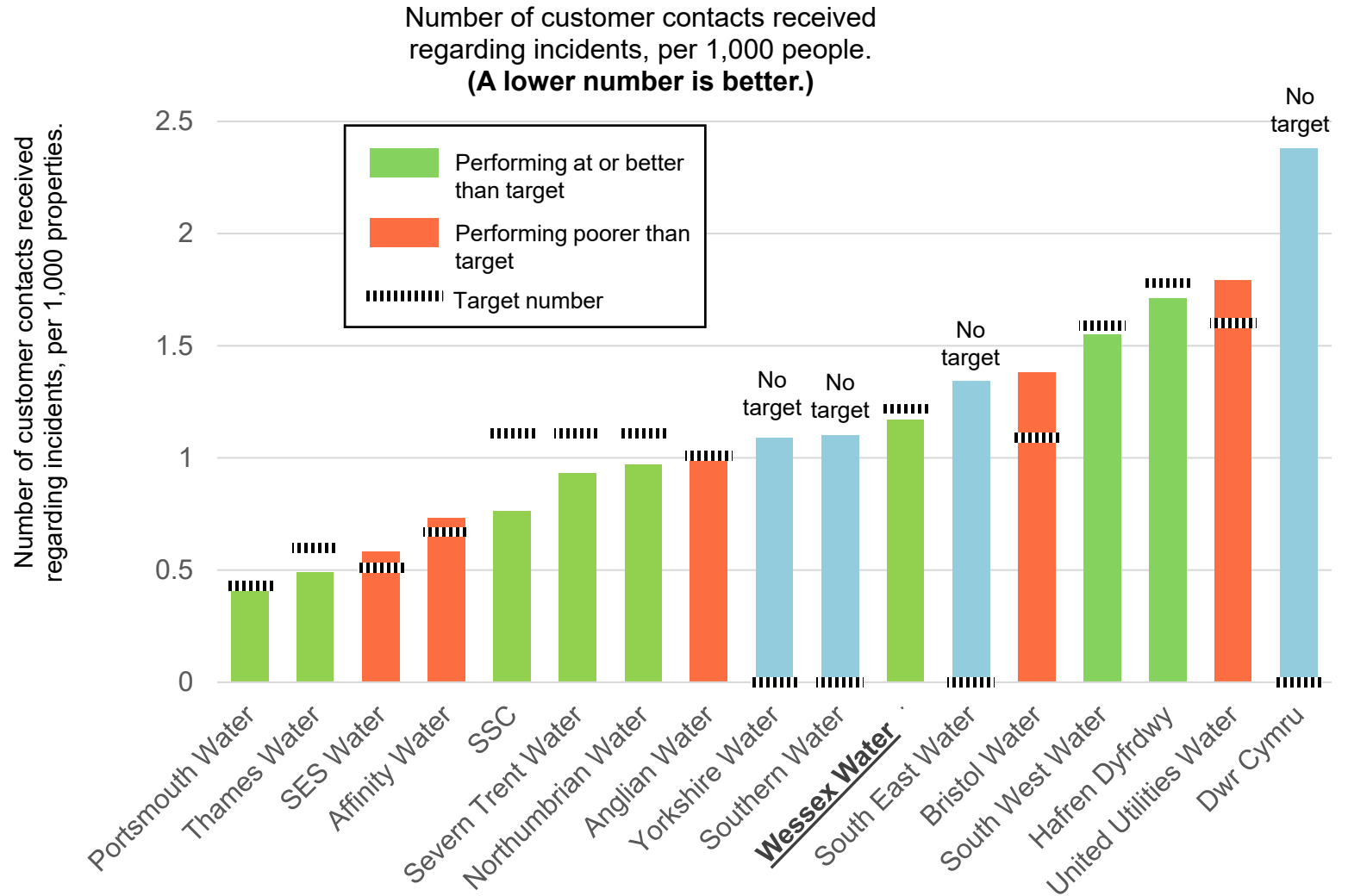
The appearance, taste and smell of tap water

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.

Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
Portsmouth Water	-5%
Thames Water	-18%
SES Water	+14%
Affinity Water	+9%
SSC	-32%
Severn Trent Water	-16%
Northumbrian Water	-13%
Anglian Water	+2%
Yorkshire Water	No target
Southern Water	No target
Wessex Water	-4%
South East Water	No target
Bristol Water	+27%
South West Water	-3%
Hafren Dyfrdwy	-4%
United Utilities Water	+12%
Dwr Cymru	No target

Water companies measured on the number of customer contacts regarding the appearance, taste and smell of tap water.



Sewage flooding of properties

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.

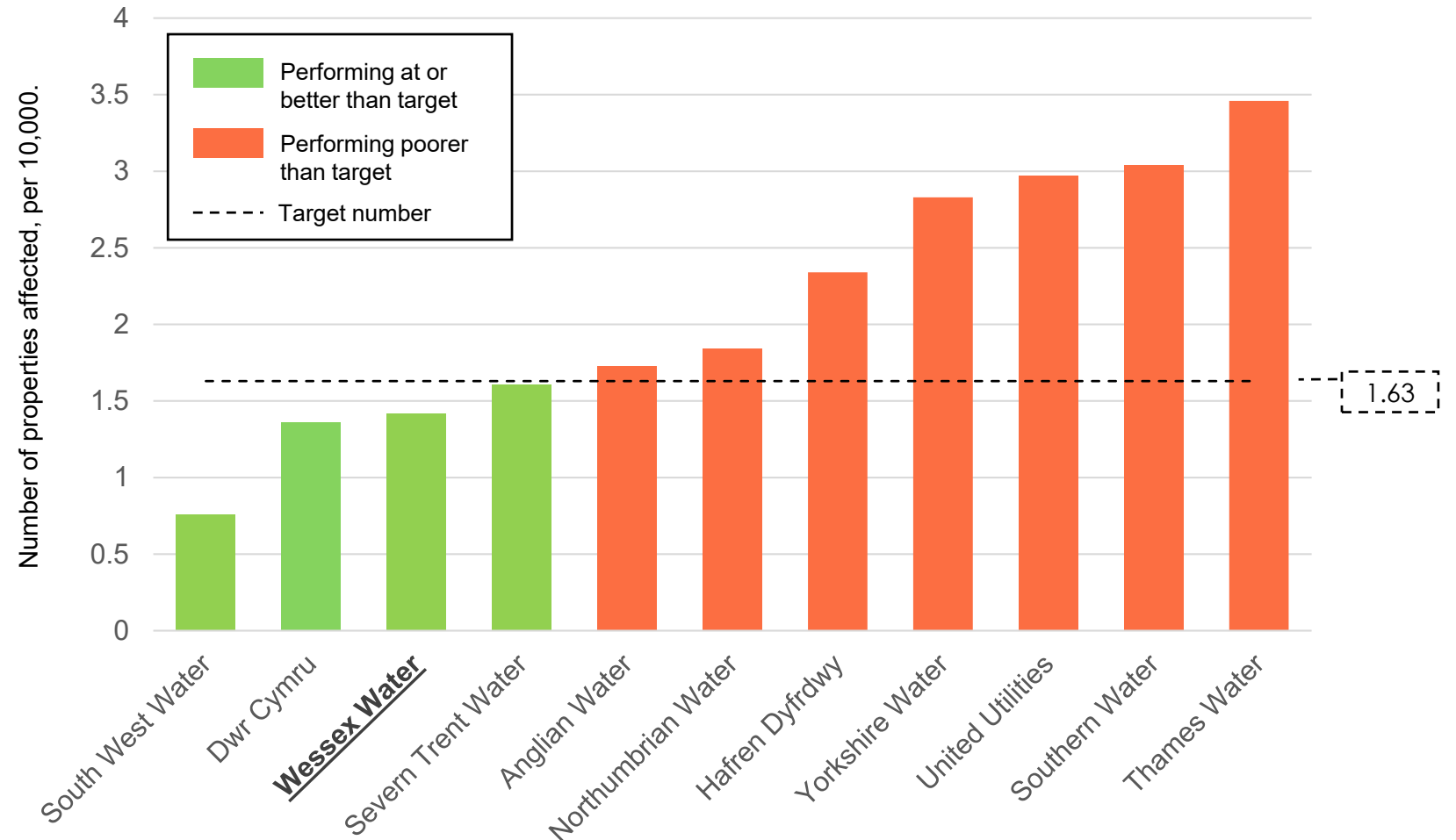
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance Against Target
South West Water	-53%
Dwr Cymru	-17%
Wessex Water	-13%
Severn Trent Water	-1%
Anglian Water	+6%
Northumbrian Water	+13%
Hafren Dyfrdwy	+44%
Yorkshire Water	+74%
United Utilities Water	+82%
Southern Water	+87%
Thames Water	+112%

Water companies measured on the incidents of sewage flooding properties.



Number of properties affected, per 10,000.
(A lower number is better.)



Sewage flooding of gardens or outbuildings

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

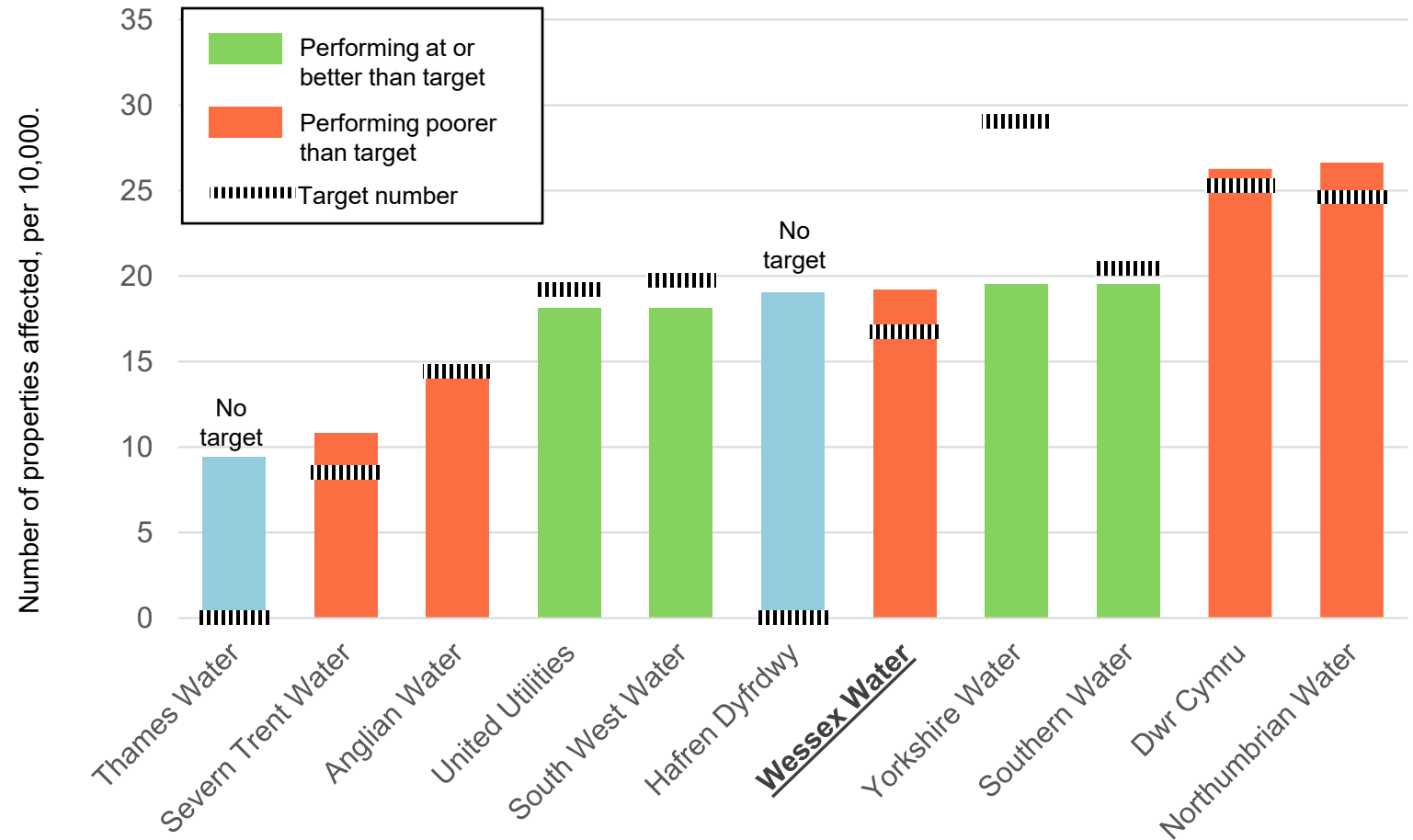
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Thames Water	No target
Severn Trent Water	+27%
Anglian Water	+1%
United Utilities Water	-6%
South West Water	-8%
Hafren Dyfrdwy	No target
Wessex Water	+15%
Yorkshire Water	-33%
Southern Water	-4%
Dwr Cymru	+4%
Northumbrian Water	+8%

Water companies measured on the incidents of sewage flooding gardens or outbuildings.



Number of properties affected, per 10,000.
(A lower number is better.)



Reducing leaks

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.

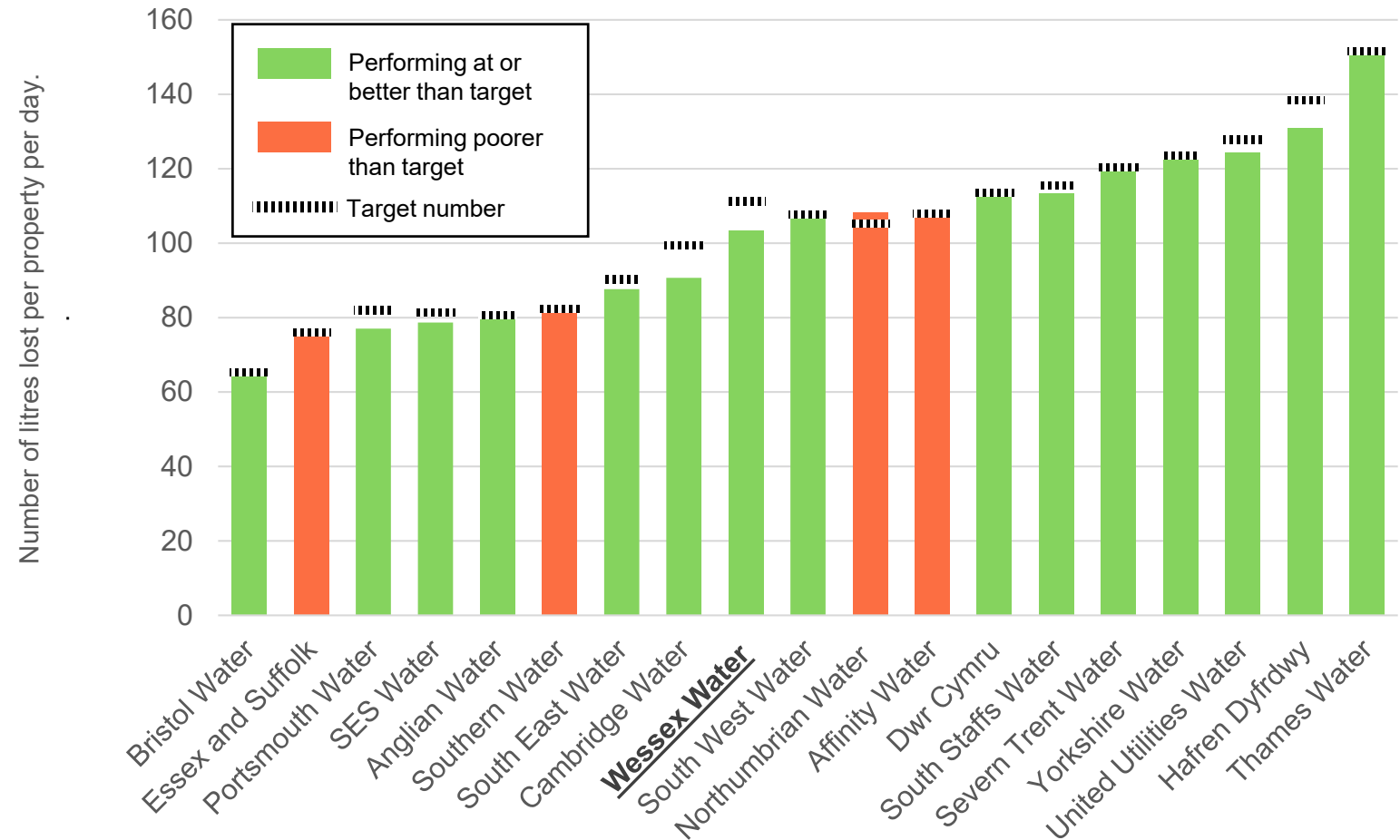
Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
Bristol Water	-0.3%
Essex and Suffolk	+0.5%
Portsmouth Water	-6.0%
SES Water	-3.3%
Anglian Water	-0.5%
Southern Water	+1.1%
South East Water	-2.8%
Cambridge Water	-8.8%
Wessex Water	-7.1%
South West Water	0%
Northumbrian Water	+2.9%
Affinity Water	+0.6%
Dwr Cymru	-1.0%
South Staffs Water	-1.7%
Severn Trent Water	-0.6%
Yorkshire Water	-0.5%
United Utilities Water	-2.9%
Hafren Dyfrdwy	-5.3%
Thames Water	0%

Water companies measured on the amount of water lost due to leaks from water mains and pipes.



Number of litres lost per property per day.
(A lower number is better.)



Pollution of rivers and bathing waters

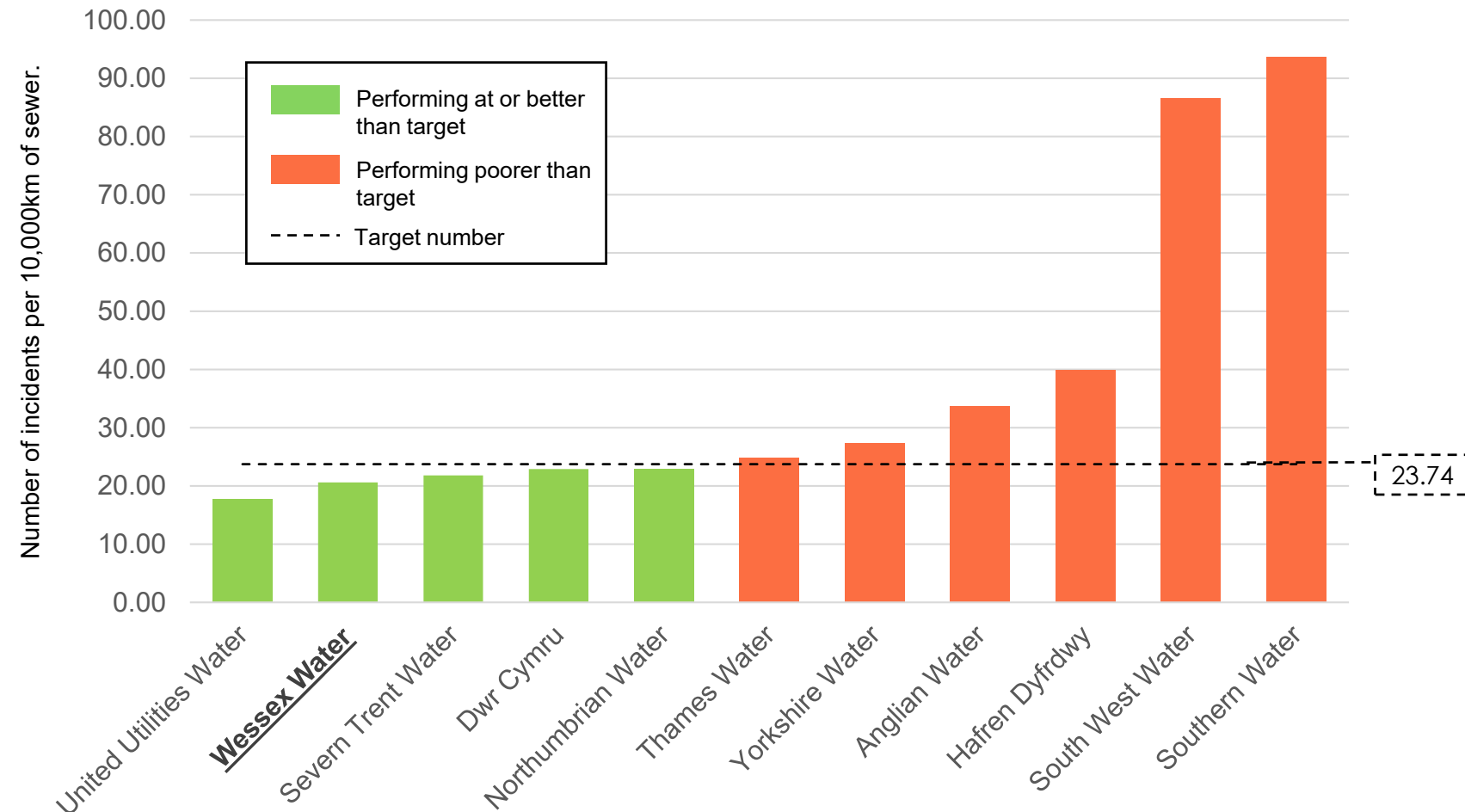
Discharges from sewage treatment or networks can affect rivers and bathing waters. This can have a minimal effect on the river ecology or a major effect depending on the scale.

Company performance against target.
(A lower percentage is better.)

Water and Sewerage company	Performance against target
United Utilities Water	-25.3%
Wessex Water	-13.2%
Severn Trent Water	-8.1%
Dwr Cymru	-3.6%
Northumbrian Water	-3.2%
Thames Water	+4.7%
Yorkshire Water	+15.3%
Anglian Water	+42.2%
Hafren Dyfrdwy	-70.9%
South West Water	+264.7%
Southern Water	+294.4%

Water companies measured on the number of incidents of pollution of rivers and streams.

Number of incidents per 10,000km of sewer.
(A lower number is better.)





Supply interruptions



Water Quality



Internal sewer flooding



External sewer flooding



Leakage
















Pollution

What impressions do you have of the performance?

Wessex Water proposes an investment plan for 2025-30 to start to meet its long term goals.

The proposed commitments to improve on the key performance areas

			TODAY's performance	Target performance by 2030	What this will add to your bill
Supply interruptions		<i>Average time without water per household</i>	5 mins	 5 mins	£0
Water Quality		<i>Contacts per 1,000 population</i>	1.17 contacts	 1 contact	£4
Internal sewer flooding		<i>Incidents per 10,000 connections</i>	1.43 incidents	 1.04 incidents	 £25
External sewer flooding		<i>Incidents per 10,000 connections</i>	19.27 incidents	 14.5 incidents	
Leakage		<i>Number of litres lost per property per day</i>	103.29 litres	 93.02 litres	£13
Pollution		<i>Incidents per 10,000km of sewer</i>	20.6 incidents	 17.6 incidents	£7

Climate change impacts



- Warmer, drier summers and wetter winters predicted
- More frequent droughts and floods
- Adapting to climate change
- Reaching net zero

Population changes



- Meeting supply & waster needs for new housing
- Managing pollution risks from increasing sewer use
- Building sustainable drainage for storm water

New and existing statutory requirements



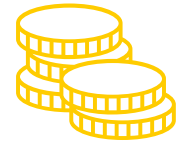
Managing:

- Pollution risks
- Sustainable water 'abstraction'
- Supply & demand: reducing what we use

Protecting rivers and coasts & environmental protections

Water quality

Economic factors



- Cost of living crisis
- Rising costs for businesses
- Affordability of bills
- Inflation



**Wessex Water has 7
long term outcomes**

**This is what they aim
to achieve by 2050**

Affordable bills



Zero water poverty – no households spending more than 5% of their disposable income on their water bill

Effective sewerage system



Halve the impact of sewer flooding on our customers

Managing demand for water



Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences

Net zero carbon



Be a net zero carbon business by 2040

Safe and reliable water



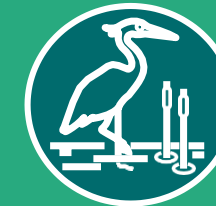
- 100% compliance with drinking water standards, always
- Zero supply interruptions of longer than 3 hours.

Great river & coastal water



- To restore the quality of our rivers and coastal waters
- Zero pollution incidents

Biodiversity



Double our contribution to the region's biodiversity

1

Proposed plan

This is Wessex Water's proposed plan and includes extra work over and above what they are required by law to provide extra benefits to customers, the environment and local communities

2

'Must do' plan

This plan allows Wessex Water to carry out the work that they are required to do by law

Also the **least cost** plan

There are 3 different types of investments in the plan:

Legally required investments

No say

All water companies are required to invest in new improvements **to comply with laws including new environmental legislation.**

Customers do not have a say in whether these investments go ahead.

Investments to meet 5 year performance targets

Customer feedback

All water companies are ***stipulated by regulators*** to set ambitious performance targets.

Customers do have some say in determining whether the targets are ambitious enough – or too ambitious – or too costly.

Longer term investments

Customer input: how & when

All water companies can propose investments in addition to the minimum requirements **to help meet longer term goals.**

Customers have a large say and can give a view on what they think is the appropriate scale and pace of any additional investments.

2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system

Halve the impact of sewer flooding on our customers



Reducing the number of sewage spills in 150 locations

£55

Reducing internal and external sewer flooding

£25

Reduce sewage spills in further 45 locations

£27

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Reducing leaks

£13

Install smart meters in 90% of all properties

£34

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Nutrient removal

£111

Reduce pollution incidents to 14 per 10k of sewer pipe

£7

Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Keep supply interruptions at 5 mins per property

£0

Reduce contacts re taste, smell, look

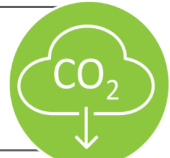
£4

Replace 12,000 lead pipes

£5

Net zero carbon & biodiversity

Be a net zero carbon business By 2040



Reduce carbon & pollutants from sewer sludge

£18

Operationally net zero

£10

What will it mean for bills?

This proposed plan will have an impact on customers' bills.

A £1000 bill today would increase by £61/month by 2030.

This breaks down as:

- £22 to meet the investment required by the regulators (*the blue and grey investments*)
- £9 to meet the investments we propose over and above this (*the white investments*)
- £30 to meet inflation

2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system

Halve the impact of sewer flooding on our customers



Reducing the number of sewage spills in 150 locations

5.5%

Reducing internal and external sewer flooding

2.5%

Reduce sewage spills in further 45 locations

2.7%

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Reducing leaks

1.3%

Install smart meters in 90% of all properties

3.4%

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Nutrient removal

11.1%

Reduce pollution incidents to 14 per 10k of sewer pipe

0.7%

Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Keep supply interruptions at 5 mins per property

0%

Replace 12,000 lead pipes

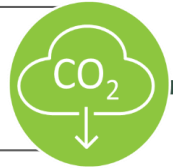
0.5%

Reduce contacts re taste, smell, look

0.4%

Net zero carbon & biodiversity

Be a net zero carbon business By 2040



Reduce carbon & pollutants from sewer sludge

1.8%

Operationally net zero

1%

What will it mean for bills?

This proposed plan will have an impact on customers' bills.

Bills would increase by 73.4% by 2030.

This breaks down as:

- 2.2% to meet the investment required by the regulators (*the blue and grey investments*)
- 0.9% to meet the investments we propose over and above this (*the white investments*)
- 3% to meet inflation

NHH FOCUS GROUP
Online – part 2
May 2023



2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system

Halve the impact of sewer flooding on our customers



Reducing the number of sewage spills in 150 locations

£55

Reducing internal and external sewer flooding

£25

Reduce sewage spills in further 45 locations

£27

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Reducing leaks

£13

Install smart meters in 90% of all properties

£34

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Nutrient removal

£111

Reduce pollution incidents to 14 per 10k of sewer pipe

£7

Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



Keep supply interruptions at 5 mins per property

£0

Reduce contacts re taste, smell, look

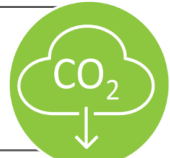
£4

Replace 12,000 lead pipes

£5

Net zero carbon & biodiversity

Be a net zero carbon business By 2040



Reduce carbon & pollutants from sewer sludge

£18

Operationally net zero

£10

What will it mean for bills?

This proposed plan will have an impact on customers' bills.

A £1000 bill today would increase by £61/month by 2030.

This breaks down as:

- £22 to meet the investment required by the regulators (*the blue and grey investments*)
- £9 to meet the investments we propose over and above this (*the white investments*)
- £30 to meet inflation

An effective sewerage system

Legally required
No say

Reducing the
number of sewage
spills in 150
locations

£55



2050 target:

To halve the number of sewer flooding incidents.



Storm overflows

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. This helps to reduce the risk of properties being flooded with sewage.

There are around 15,000 storm overflows in England, and 1,300 for Wessex Water.

Each company (in England) has a target set by Government to reduce the use of storm overflows:

- By 2035, water companies will have: improved all overflows discharging into or near every designated bathing water; and improved 75% of overflows discharging to high priority sites
- By 2050, no storm overflows will be permitted to operate outside of unusually heavy rainfall or to cause any adverse ecological harm

Wessex Water will need to spend £540m to meet these requirements for 2025-2030, and this will add £55 to a £1,000 water bill.



2050 target

To restore the quality of rivers and coastal waters

Legally required
No say

Nutrient removal
and river water
quality monitoring

£111



The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.

- Excess nitrogen and phosphorus can affect the health of river and coastal waters, negatively impacting plant and wildlife who live there
- A large portion of Wessex Water's region has been designated as requiring additional nutrient removal to allow a further 70,000 homes to be built
- As a result, Wessex Water needs to remove 1,500 tonnes of nitrogen and phosphorus from entering rivers and the sea. This will improve river water quality and help unblock the housing backlog across the country
- Partnership working with farmers and landowners will be vital – and using nature-based solutions where possible, which are often cheaper, create less carbon, and increase biodiversity

Wessex Water will need to spend £830m to meet these requirements for 2025-2030, and this will add £111 to a £1,000 water bill.



How acceptable or unacceptable do you find these legally required investments?




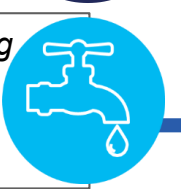

2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

5 year targets: *customer feedback*

Longer term investments:
your input on how & when

Effective sewerage system	<i>Halve the impact of sewer flooding on our customers</i>		Reducing the number of sewage spills in 150 locations	£55	Reducing internal and external sewer flooding	£25	Reduce sewage spills in further 45 locations	£27
Managing demand for water	<i>Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences</i>				Reducing leaks	£13	Install smart meters in 90% of all properties	£34
Great river & coastal water	<ul style="list-style-type: none"> To restore the quality of our rivers and coastal waters Zero pollution incidents 		Nutrient removal	£111	Reduce pollution incidents to 14 per 10k of sewer pipe	£7		
Safe and reliable water	<ul style="list-style-type: none"> 100% compliance with drinking water standards, always Zero supply interruptions of more than 3 hours. 				Keep supply interruptions at 5 mins per property	£0	Replace 12,000 lead pipes	£5
Net zero carbon & biodiversity	<i>Be a net zero carbon business By 2040</i>				Reduce contacts re taste, smell, look	£4	Reduce carbon & pollutants from sewer sludge	£18
							Operationally net zero	£10








2050 goals

Wessex Water's proposed plan for 2025-30

Legally required
No say

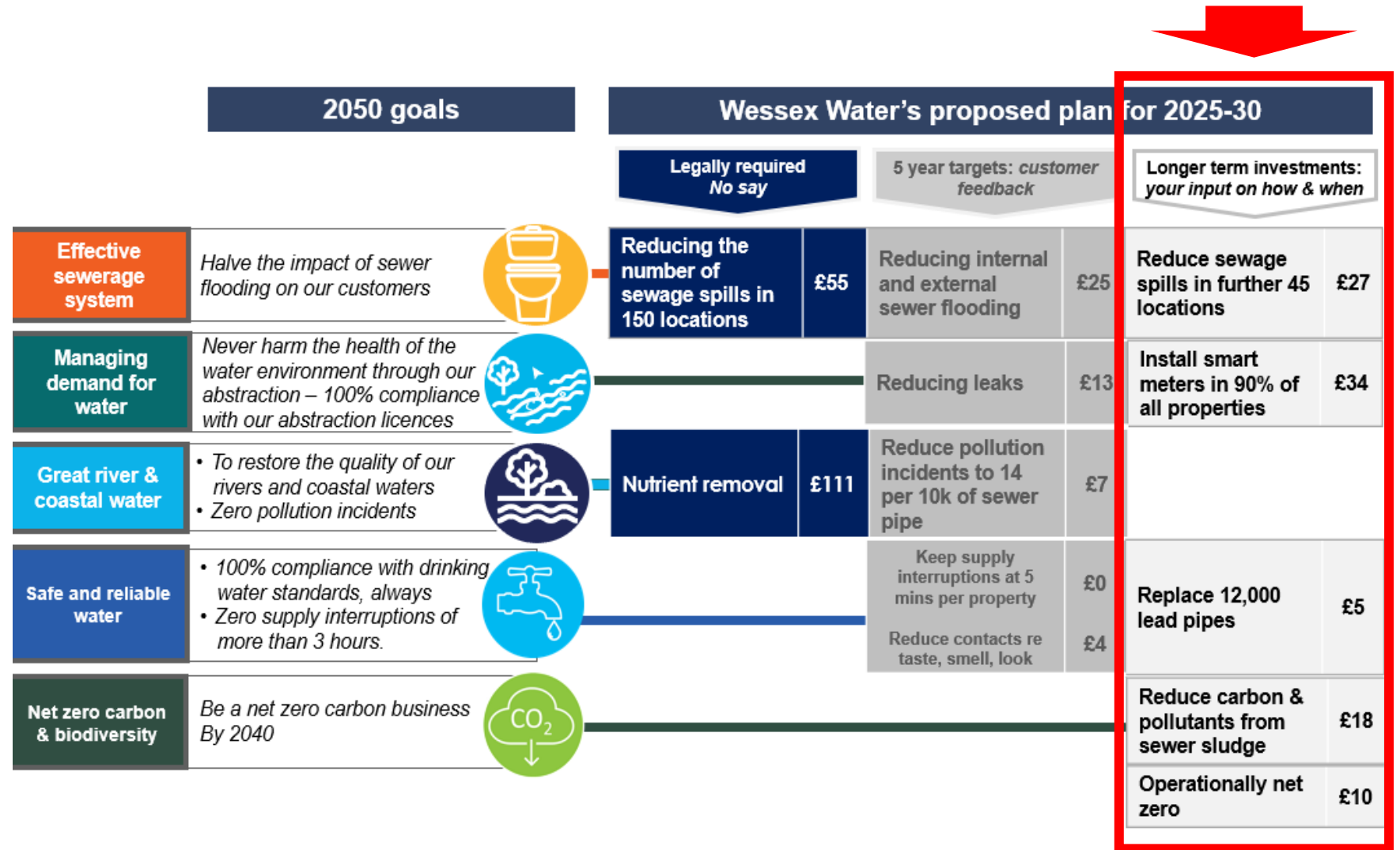
5 year targets: *customer feedback*

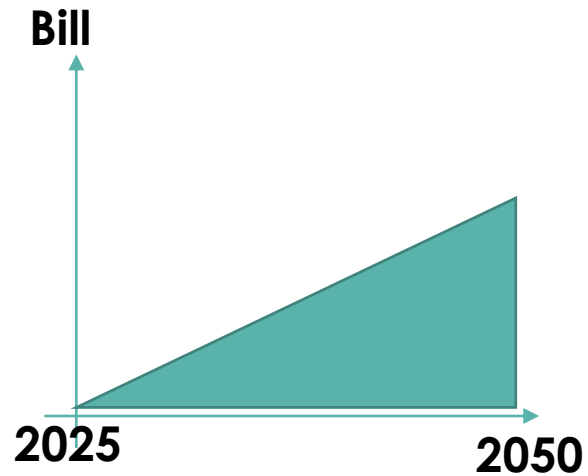
Longer term investments:
your input on how & when

<p>Effective sewerage system</p>	<p>Halve the impact of sewer flooding on our customers</p>		<p>Reducing the number of sewage spills in 150 locations</p>	<p>£55</p>	<p>Reducing internal and external sewer flooding</p>	<p>£25</p>	<p>Reduce sewage spills in further 45 locations</p>	<p>£27</p>
<p>Managing demand for water</p>	<p>Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences</p>				<p>Reducing leaks</p>	<p>£13</p>	<p>Install smart meters in 90% of all properties</p>	<p>£34</p>
<p>Great river & coastal water</p>	<ul style="list-style-type: none"> To restore the quality of our rivers and coastal waters Zero pollution incidents 		<p>Nutrient removal</p>	<p>£111</p>	<p>Reduce pollution incidents to 14 per 10k of sewer pipe</p>	<p>£7</p>		
<p>Safe and reliable water</p>	<ul style="list-style-type: none"> 100% compliance with drinking water standards, always Zero supply interruptions of more than 3 hours. 				<p>Keep supply interruptions at 5 mins per property</p>	<p>£0</p>	<p>Replace 12,000 lead pipes</p>	<p>£5</p>
					<p>Reduce contacts re taste, smell, look</p>	<p>£4</p>		
<p>Net zero carbon & biodiversity</p>	<p>Be a net zero carbon business By 2040</p>						<p>Reduce carbon & pollutants from sewer sludge</p>	<p>£18</p>
							<p>Operationally net zero</p>	<p>£10</p>

Wessex Water's proposed 5 year targets – your feedback on these

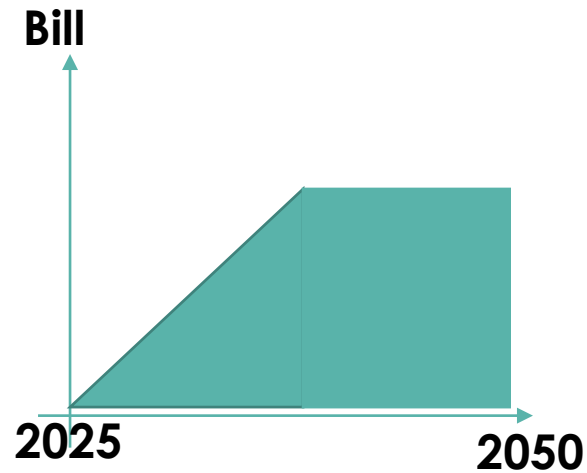
Longer term investments – your input on how and when they do these...





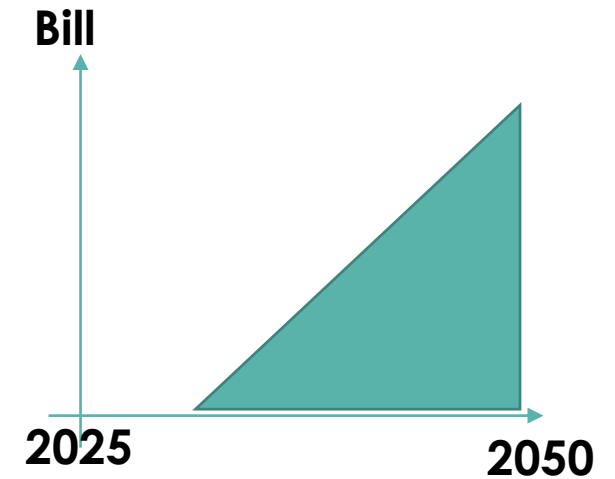
Bills rise steadily over time, and there is an even level of improvement over time

*In this scenario, **today's bill payers and future bill payers** will see a steady increase to their bills*



Bills increase in the next few years, allowing improvements to be made sooner.

*In this scenario, **today's bill payers** will see the biggest increase to bills*



No bill increase now, then the bill increases more sharply so the benefits are delivered later

*In this scenario, **future bill payers** will see the biggest increase to bills*



2050 target:
100% of lead pipes replaced

Discretionary investments
You decide

Replacing 12,000
lead pipes

£5

The proposal is to replace 12,000 customer lead pipes in the next per 5-year period, increasing the rate of replacement thereafter to complete full replacement by 2050.

- Lead pipes are estimated to affect 100,000 properties (which is 18% of all households in the region)
- Replacement would involve the ‘communication pipe’ that runs from the mains to the wall of the house (not within the house)

Wessex Water propose to spend £28.2m on replacing lead pipes, and this would add £5 to a £1,000 water bill.

Discretionary investments
You decide

Replacing 12,000
lead pipes

£5 per year

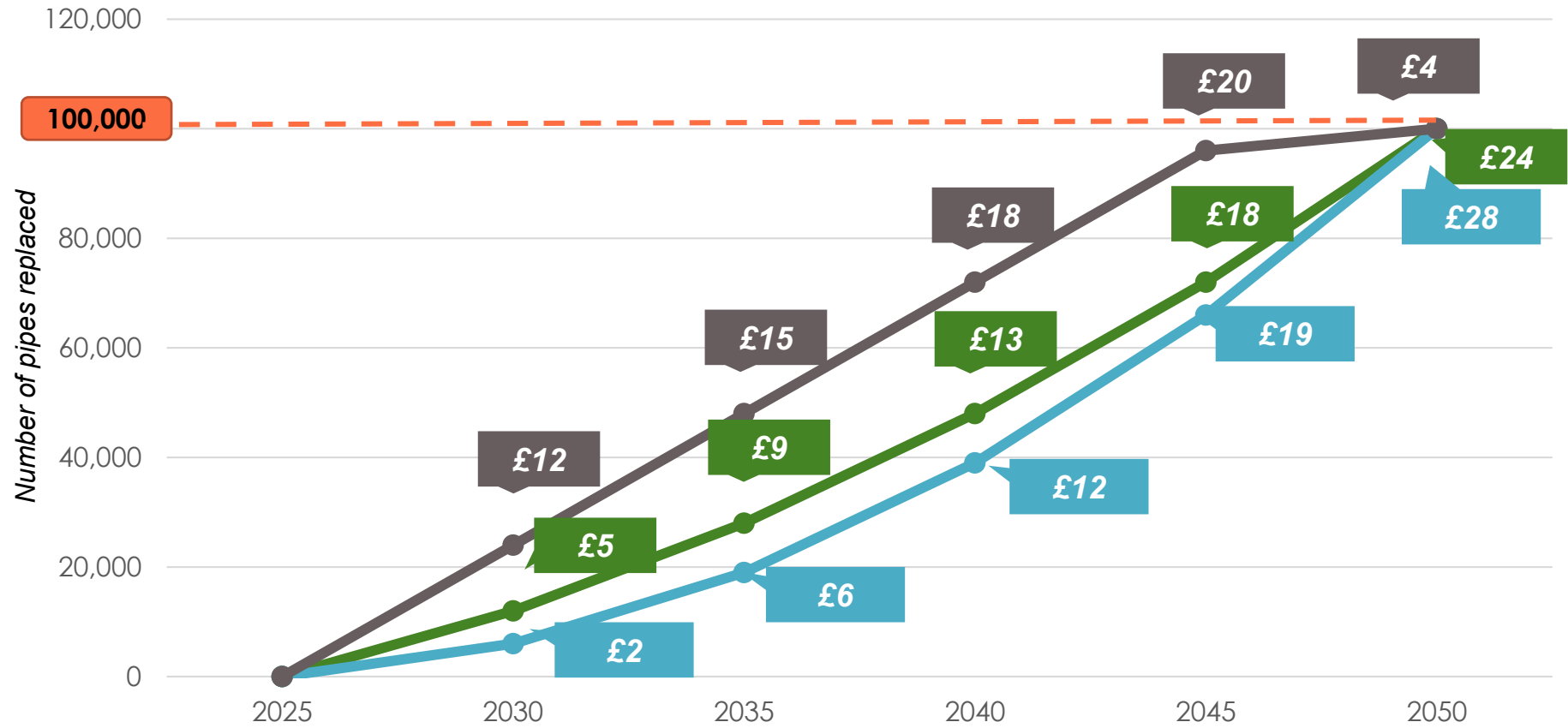
A is the proposed plan.

B is the slower plan

C is the fastest plan

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period

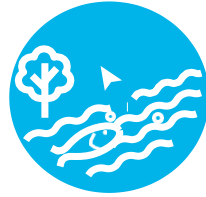


- A: Spread investment & bills over 25 years: more pipes removed earlier than the lower cost plan
- B: Delay investment now; accelerate investment in the 2040s
- C: Investment (and bills) frontloaded to remove more lead pipes sooner

Discretionary investments
You decide

Introduce smart meters to manage leaks and help customers lower use

£34 per year



2050 target:

100% compliance with the amount of water it is licenced to take from rivers and groundwater.

The proposal is to have 90% of all properties installed with a smart meter by 2030. This means installing 600,000 smart meters

Wessex Water propose to spend £180m on introducing smart meters, and this would add £34 to a £1,000 water bill.

Managing demand for water

The long term ambition is to have 90% of all properties installed with a smart meter. This means installing 600,000 smart meters.

Discretionary investments
You decide

Introduce smart meters to manage leaks and help customers lower use

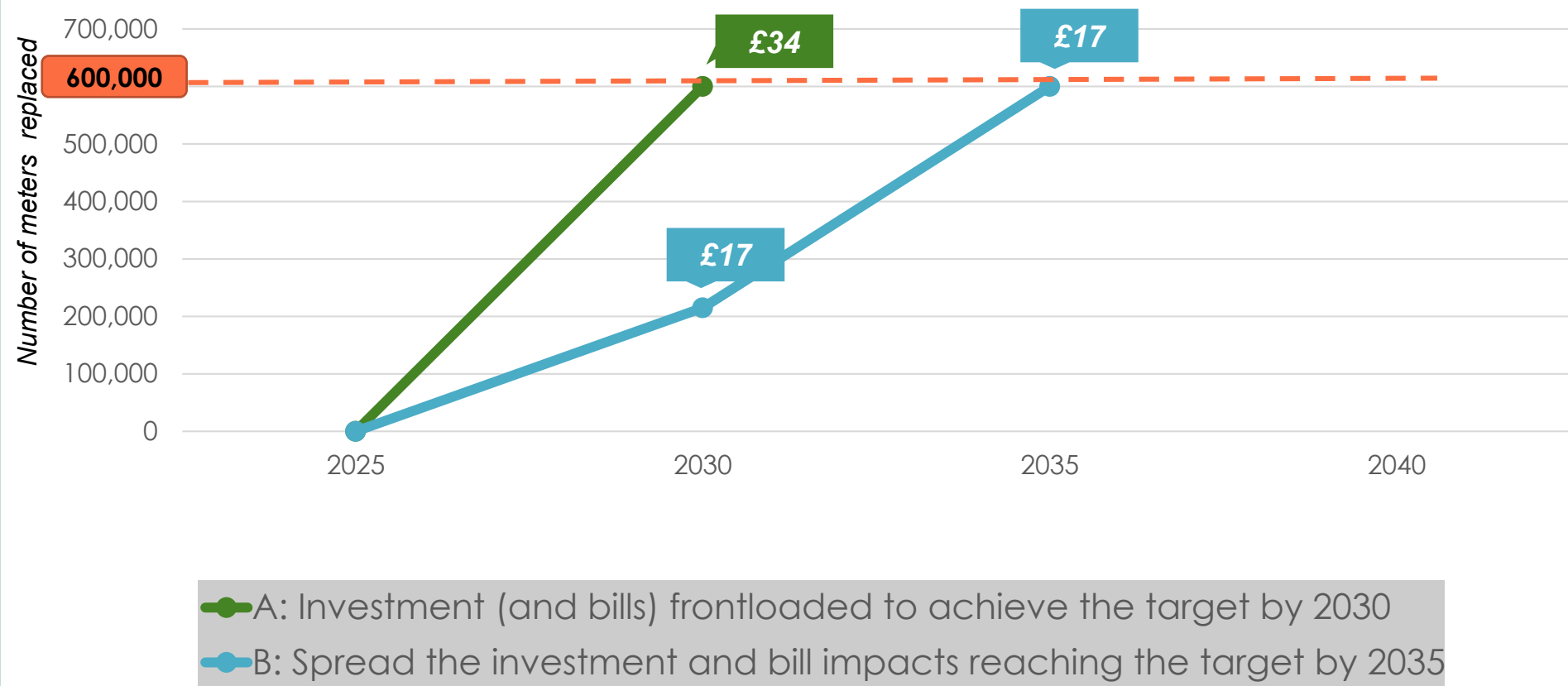
£34 per year

A is the proposed plan

B is the least cost plan

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period



- A: Investment (and bills) frontloaded to achieve the target by 2030
- B: Spread the investment and bill impacts reaching the target by 2035



2050 target:

Be a net zero carbon business by 2040

Discretionary investments
You decide

**Making all
operations net zero**

£10

Proposal for making the company's operations carbon neutral by 2030

- Moving entirely to electric vehicles
- Increasing the use of renewable electricity
- Finding the best way to reduce emissions from sewage treatment processes
- Using nature-based solutions like wetlands as an alternative to concrete structures
- Where appropriate, purchasing high-quality offsets until Wessex Water can further reduce its own emissions

Wessex Water propose to spend £37m on making all operations net zero, and this would add £10 to a £1,000 water bill.

Net zero carbon and biodiversity

Discretionary investments
You decide

Making all operations net zero

£10

A is the proposed plan.

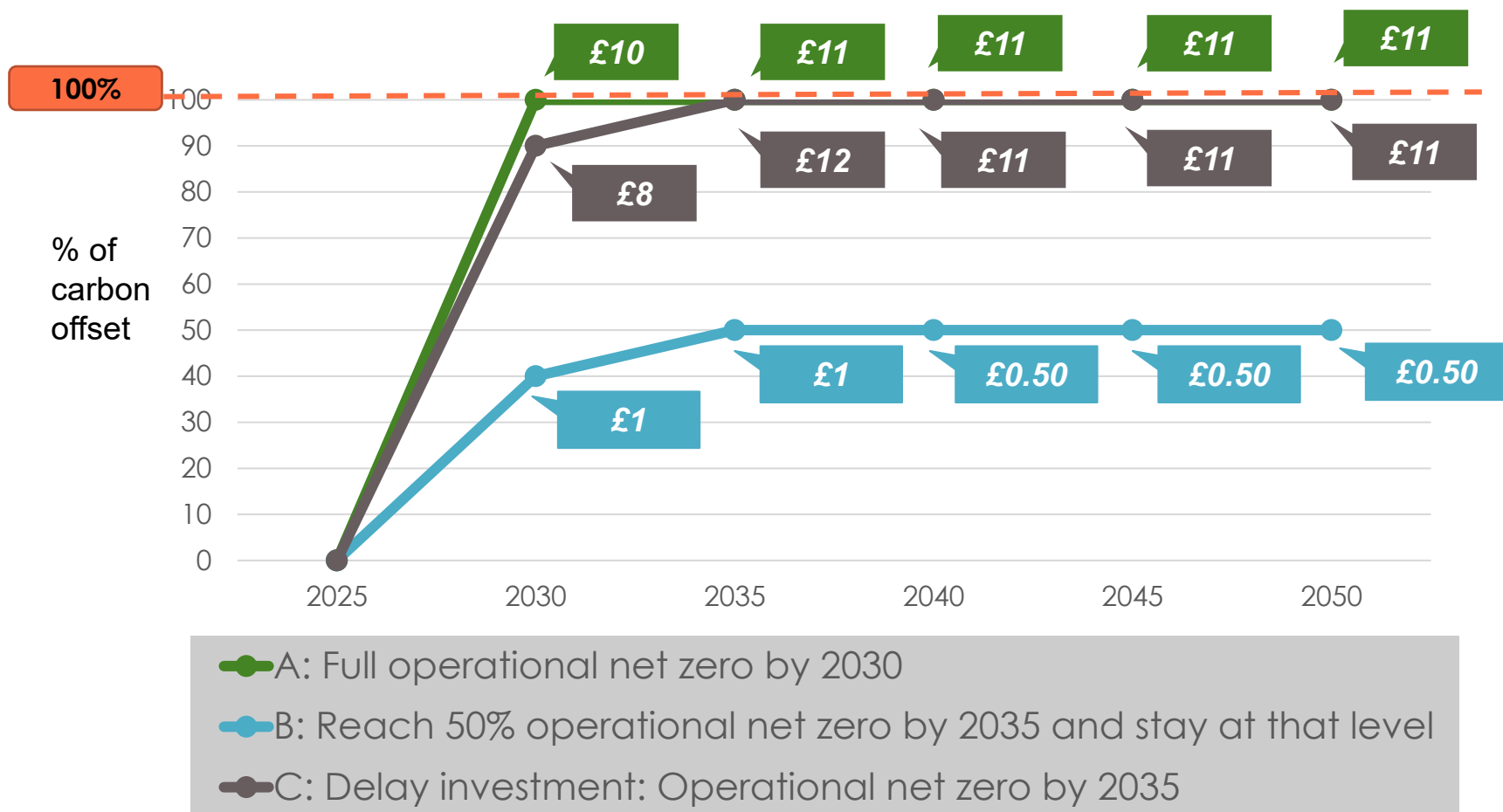
B is the less ambitious plan

C delays investment in the short term

The long term ambition is to be net zero (i.e. 100% carbon offset) by 2040 .

How would you like Wessex Water to pace this investment?

How each option would impact an average bill by the end of each 5-year period





2050 target:

Be a net zero carbon business by 2040

Discretionary investments
You decide

Removing micro
pollutants

£18

Proposal for improving the treatment of sewage sludge to remove micropollutants from being spread to land

- Trialling new technologies that, if they work, have the potential to turn the sludge into a material that does not have any carbon emissions (essentially an ash) which also destroy micropollutants in the sludge so these wouldn't be spread to land.
- If they work Wessex Water will implement these at scale in the future, reducing the carbon emissions and reducing the volume of the waste product we produce.
- Legislation does not currently prevent sludge being spread to land, but may do so in the future. Wessex Water propose to test new technology now and ensure it develops in case this change occurs

Wessex Water propose to spend £150m on removing micropollutants, and this would add £18 to a £1,000 water bill.

Net zero carbon and biodiversity

Discretionary investments
You decide

Removing micro pollutants

£18

A is the proposed plan.

B is the minimum requirement plan

C is a back up plan for option A

The long term ambition is to be a net zero business by 2040.

45

How would you like Wessex Water to invest?

A Proposed:

Trialling & implementing new technologies to turn the sludge into a material that does not have any carbon emissions & also destroys micropollutants in the sludge such as microplastics so these wouldn't be spread to land.

B: 'Least cost' option:

- Continue to spread sludge to land by building more storage barns to cope with increasing volumes.
 - Test new sludge treatment technologies in the near term in readiness for any future legislation changes, but not roll these out.
- NB This option does not reduce carbon impact nor provide a new way to dispose of sludge.

C - Back up: If proposed plans don't work – and the ability to spread to land is significantly reduced, Wessex Water would have to install (carbon intensive) incinerators and dryers at some sites to burn the sludge. This would remove the micropollutants in the sludge

Bill impact by end of each 5 year period



An effective sewerage system

Discretionary investments
You decide

Reducing sewage
spills in a further 45
locations

£27



2050 target:

To halve the number of sewer flooding incidents.

Proposed plan for reducing sewage spills in a further 45 locations - by 2030

- Increase investment in this area from £500 million to £734 million over the five years between 2025 and 2030
- Start with storm overflows that discharge most frequently and those that have any environmental impact
- Work with communities to fit sustainable drainage solutions like soakaways
- Increase environmental and public health monitoring at key locations
- Use artificial intelligence to manage the sewerage network and provide real time bathing water information

Wessex Water propose to spend £250m on reducing sewage spills in a further 45 locations, and this would add £27 to a £1,000 water bill.

An effective sewerage system

The long-term ambition is for the spills from almost 700 overflows to be reduced in line with 2050 legislative targets

Discretionary investments
You decide

Reducing sewage spills in further 45 locations

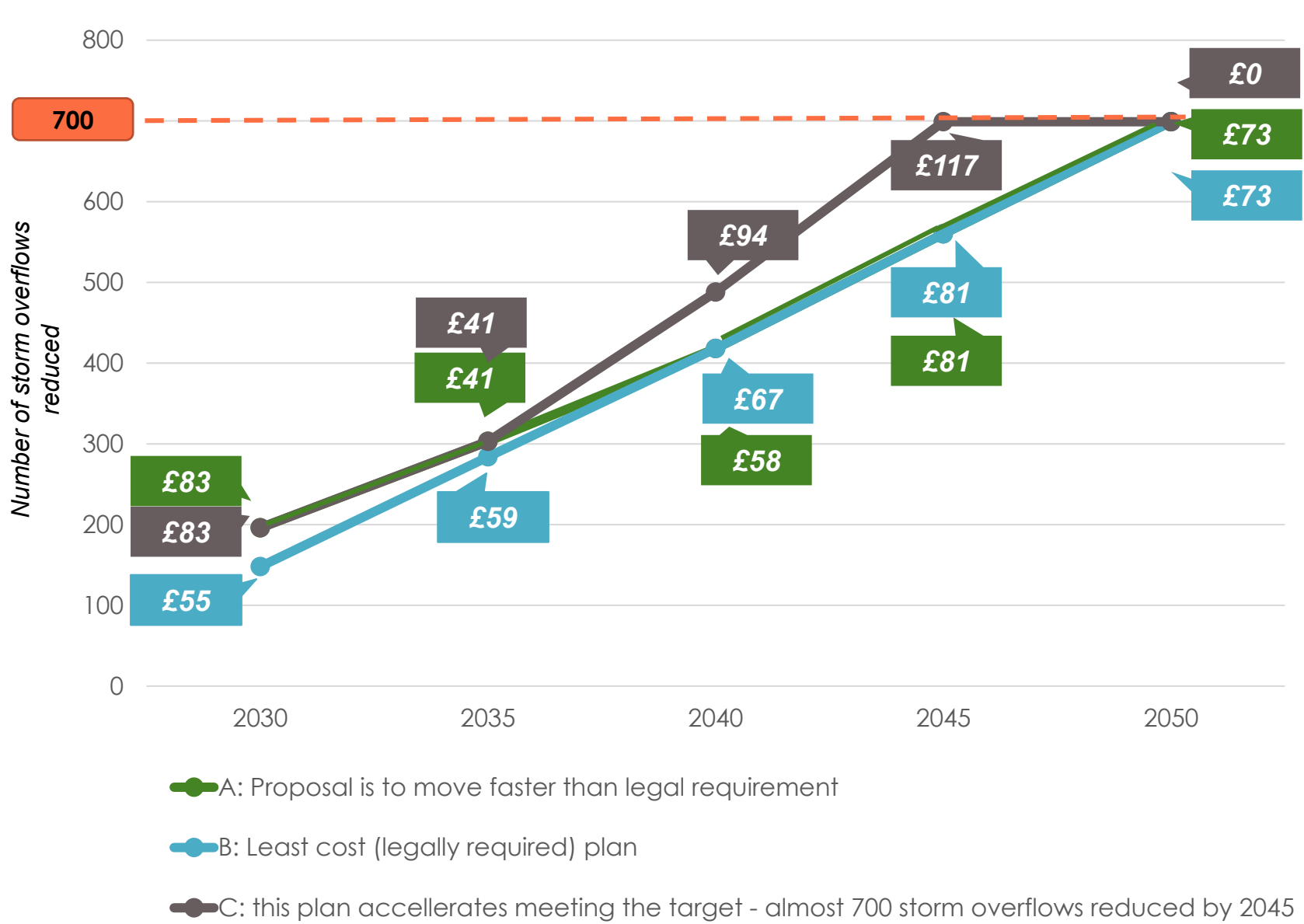
£27

A is the proposed plan.

B is the legally required plan.

C accelerates the delivery to 2045 instead of 2050

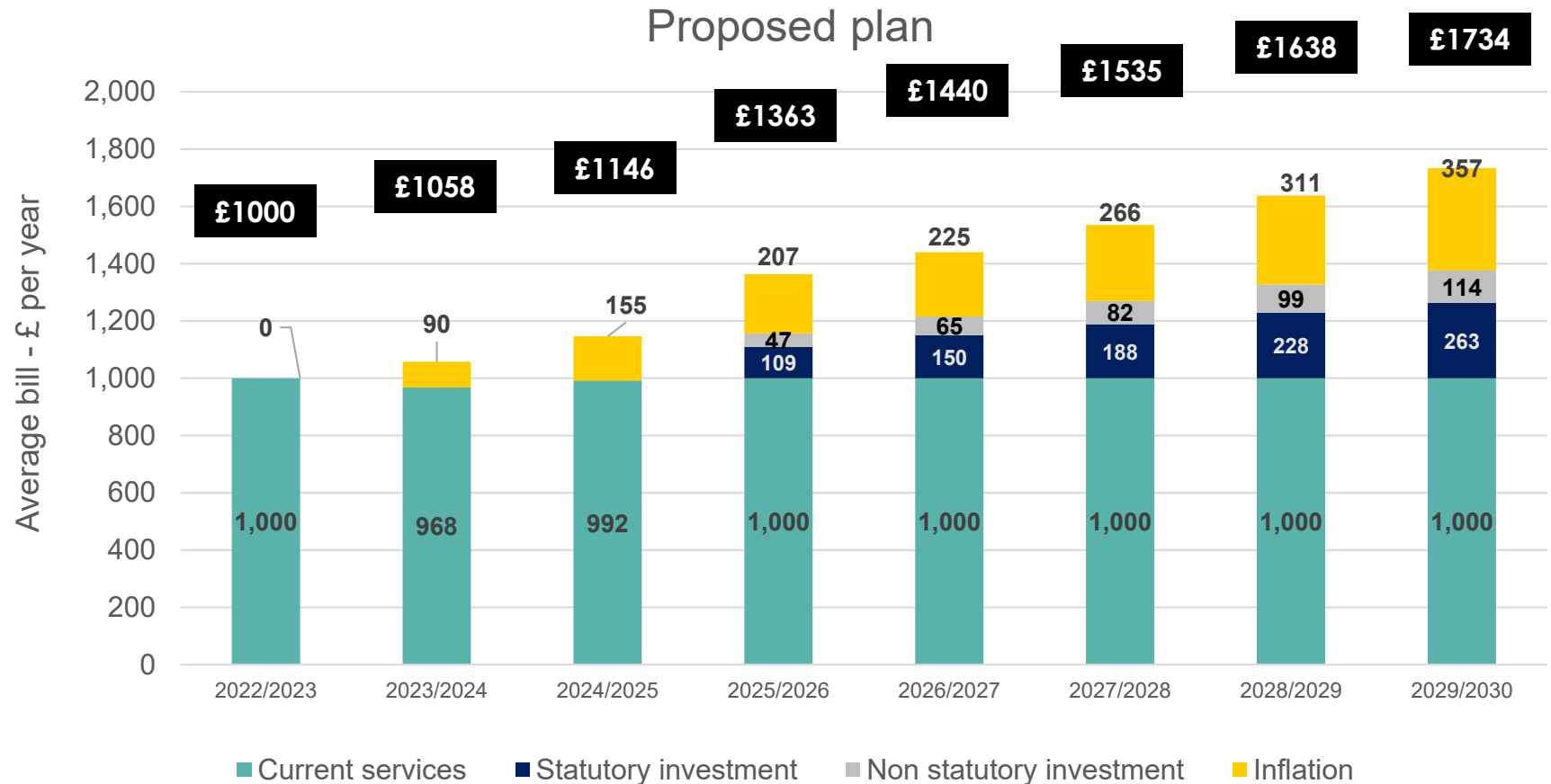
How would you like Wessex Water to pace this investment?



What would this proposed plan cost?

When you add the investment in each area, a £1000 bill will increase by £61 a month (£734 a year) by 2030. This includes:

- £22 a month of investment that regulators say we must make (statutory investment)
- £9 a month of investment that we want to make to maintain and improve our services to you, and
- £30 a month of inflation.



NB You will see a personalised bill prediction at the end of the session

**‘Must do’
business plan**

2050 goals



2050 goals

Effective sewerage system

Halve the impact of sewer flooding on our customers



Longer term investments:
your input on how & when

Managing demand for water

Never harm the health of the water environment through our abstraction – 100% compliance with our abstraction licences



Trial smart meters ahead of rollout

£17

There are 6 areas where Wessex Water can reduce the cost of the plan

It can delay smart meter rollout. A small investment in trials could mean a more successful rollout to be complete by 2040 (not 2030)

Great river & coastal water

- To restore the quality of our rivers and coastal waters
- Zero pollution incidents



Biodiversity

Double our contribution to the region's biodiversity



Safe and reliable water

- 100% compliance with drinking water standards, always
- Zero supply interruptions of more than 3 hours.



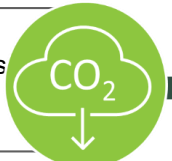
Replace 6,000 lead pipes

£2

It can reduce **lead replacement** from 12,000 pipes to 6,000 by 2030

Net zero carbon

Be a net zero carbon business by 2040



Delay net zero investment

£1

It can **delay its net zero plans** by not building the electric vehicle infrastructure or offsetting anything it cannot reduce itself. It will reach 40% net zero by 2030 instead of 100% as proposed.

Barn storage for sludge

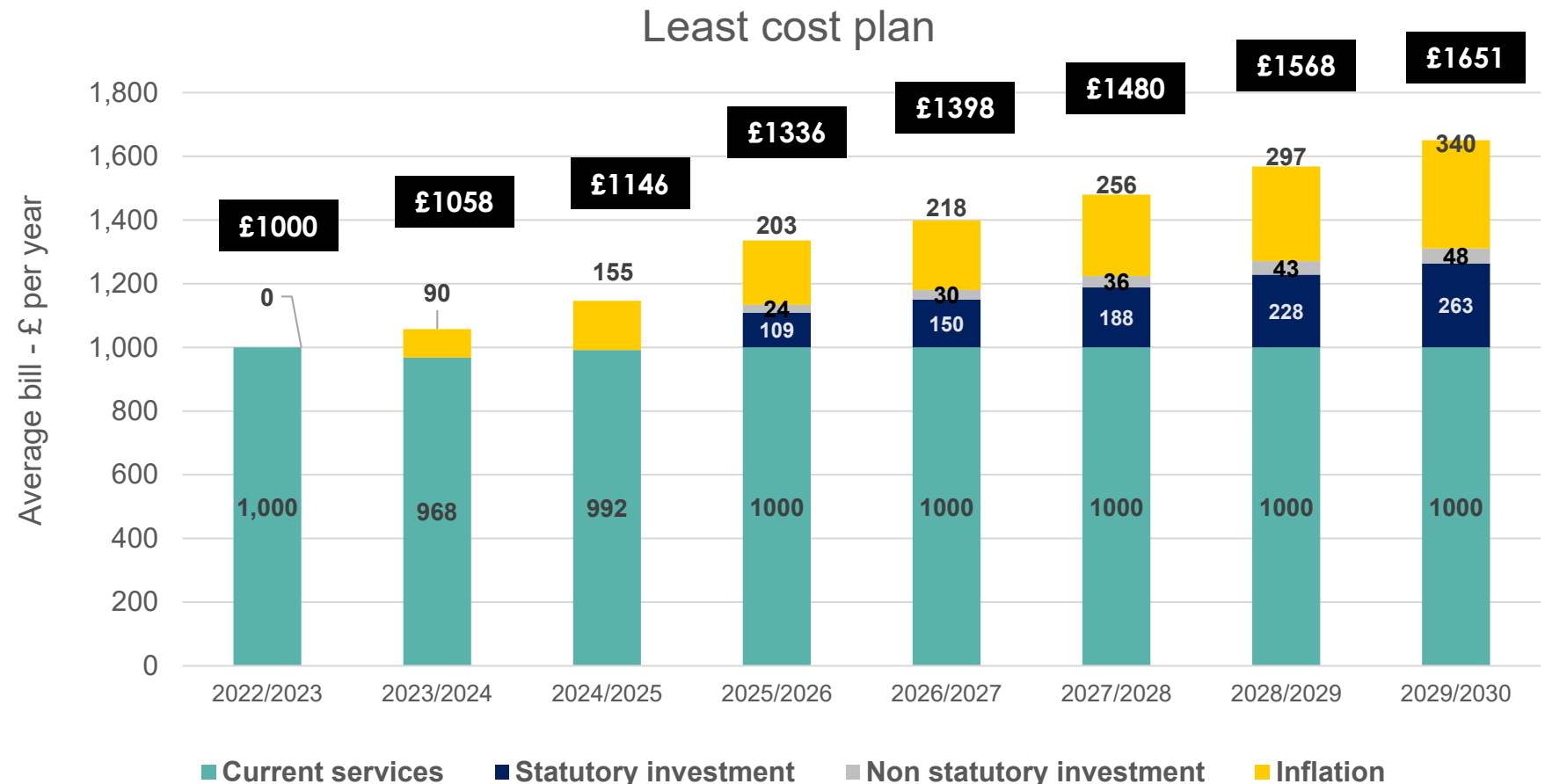
£12

It can **manage sludge** with storage barns rather than finding permanent alternatives

What would this 'must do' plan cost?

When you add the investment in each area, a £1000 bill will increase by £54 a month (£651 a year) by 2030. This includes:

- £22 a month of investment that regulators say we must make (statutory investment)
- £4 a month of investment that we want to make to maintain and improve our services to you, and
- £28 a month of inflation.



NB You will see a personalised bill prediction at the end of the session



Summarise your views in the
post-group survey.

Thank you!



BLUE MARBLE

www.bluemarbleresearch.co.uk



This questionnaire document follows the Ofwat CCW Guidance for water companies: testing customers' views of the acceptability and affordability of PR24 business plans Version 1.1
 Revised 16 03 23

Final Online Questionnaire FOR Wessex Water 01092023

Clean version with labelling

QUESTIONS THAT ARE PRESCRIBED BY OFWAT GUIDANCE LABELLED IN RED
QUESTIONS WHICH ARE NOT PRESCRIBED, BUT FOLLOW GUIDANCE LABELLED IN ORANGE
BESPOKE QUESTIONS OR ADDITIONS IN YELLOW

D1. WATER COMPANY

1	WESSEX WATER, WESSEX WATER	
2	BRISTOL WATER, WESSEX WATER	
3	BOURNEMOUTH WATER, WESSEX WATER	

D2. HOUSEHOLD/NON-HOUSEHOLD

1	HOUSEHOLD	
2	NON-HOUSEHOLD	

D3. HOUSEHOLD NOT ON SOCIAL TARIFF / ON SOCIAL TARIFF

1	HOUSEHOLD NOT ON SOCIAL TARIFF	FROM SAMPLE
2	HOUSEHOLD ON SOCIAL TARIFF	FROM SAMPLE

INTRODUCTION BELOW IS NOT SPECIFIED BY OFWAT - ADDED BY BLUE MARBLE

PROC. INTRODUCTION

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

Thank you for taking part in this survey. Before we start, we need to check you are happy with how we will use the information you share with us. The answers you give us will be used only for analysis purposes and so that we can send your voucher to you. Your answers will be handled according to GDPR data protection rules and no personally identifiable information will be passed on to your water company unless you explicitly give permission.

For NHH (D2=2):

You will be given the option of receiving an Amazon voucher or us making a donation to Water Aid at the end of the survey.

For HH (D2=1)

To receive a £5 voucher you will need to enter your email address or postal address at the end of the survey, so we can send it to you.

For Wessex NHH (D2=2)

To receive a £25 voucher you will need to enter your email address at the end of the survey, so we can send it to you.

To view the Blue Marble privacy policy, [click here](#).

To view the QRS privacy policy, [click here](#).

Please confirm if you agree to the above and would like to continue.

1	Yes, continue	
2	No, do not continue	CLOSE GO TO SCREENOUT_PII

SCREENOUT BELOW IS NOT SPECIFIED BY OFWAT - ADDED BY BLUE MARBLE
SCREENOUT PII

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF PROC=2

We're sorry you do not wish to continue, and thank you for your interest in this research.

You may now close this browser window.

Screener: Household
QUESTION PRESCRIBED BY OFWAT
S1. AGE

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLE CODE

How old are you?

1	Please specify	OPEN, NUMERIC, 0-150
96	Prefer not to say	

QUESTION BELOW WAS NOT IN OFWAT GUIDANCE, BUT ADDED IN RESPONSE TO CCG COMMENTS, AND WAS AGREED VIA EMAIL WITH OFWAT
Sage2. AGEGROUP

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH) AND S1=96 (Prefer not to write in age at S1)

SINGLE CODE

Please could you indicate which of the following age bands you fall under?

1	Under 18	
2	18-24	
3	25-34	
4	35-44	
5	45-54	
6	55-64	
7	65-74	
8	75+	
96	Prefer not to say	

DUMMY VARIABLE PRESCRIBED BY OFWAT
D4. DUMMY_AGE

RECORD FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

HIDDEN VARIABLE TO COMBINE ANSWERS FROM S1 AGE AND Sage2

1	Under 18	CLOSE GO TO SCREENOUT_AGE
2	18-24	
3	25-34	
4	35-44	
5	45-54	
6	55-64	
7	65-74	
8	75+	

QUESTION BELOW WAS NOT IN OFWAT GUIDANCE, BUT ADDED IN RESPONSE TO CCG COMMENTS
S1b. AGE

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 AND Sage2= 96 (HH AND PREFER NOT TO SAY)

SINGLE CODE

Before we continue, can we check if you are 18 years old or above?

1	Yes – I am 18 years old or above	
2	No, I am under 18 years old	CLOSE GO TO SCREENOUT_AGE
3	Prefer not to answer	CLOSE GO TO SCREENOUT_AGE

SCREENOUT BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED
SCREENOUT_AGE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF D4=1 OR S1b= 2 OR 3 (UNDER 18 or PREFER NOT TO SAY)

'We're sorry but for this research we can only include those who are 18 years old or above. Thank you for your interest and we hope that you will take part in our surveys in future. You may now close this browser window.'

QUESTION PRESCRIBED BY OFWAT
S2. BILL-PAYER STATUS

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLE CODE

Are you solely or jointly responsible for paying your household's water and sewerage bill?
Please select one answer only

1	Yes	
2	No, I am not responsible for paying the bill	CLOSE GO TO SCREENOUT_BILLPAYER
97	Don't know	CLOSE GO TO SCREENOUT_BILLPAYER

SCREENOUT BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED
SCREENOUT_BILLPAYER

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF S2=2,97 (Not responsible for bill)

'We're sorry but for this research we can only include those who are responsible for paying their household's water and sewerage bill. Thank you for your time and we are sorry for any inconvenience. You may now close this browser window.'

QUESTION PRESCRIBED BY OFWAT
S3. WATER METER STATUS

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLE CODE

Are you currently charged for water through a water meter?

Please select one answer only

1	Yes	
2	No	
97	Don't know	

D5. DUMMY_COMPANY

HIDDEN VARIABLE. FOR HH CUSTOMERS THIS IS DEFINED BY SAMPLE LIST. FOR NHH THIS IS DEFINED BY POSTCODE

	D5_1	D5_2	
D1=1	Wessex Water		
D1=2	Bristol Water	Wessex Water	
D1=3	Bournemouth Water	Wessex Water	

QUESTION PRESCRIBED BY OFWAT

S4. WATER COMPANY

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLE CODE

[PIPE IN D5_1 Wessex Water / Bristol Water / Bournemouth Water] is your water company and <FOR D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA PIPE IN: D5_2 Wessex Water> is responsible for your sewerage services. Does this sound right?

Please select one answer only

1	Yes	
2	No	CLOSE GO TO SCREENOUT_SUPPLIER
97	Don't know	

SCREENOUT BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED

SCREENOUT_SUPPLIER

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF S4=2 (Not correct water company)

'We're sorry but for this survey we can only include customers supplied by <PIPE IN: D5_1 Wessex Water / Bristol Water / Bournemouth Water> for water supply and <FOR D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA [PIPE IN: D5_2 Wessex Water]> for sewerage services. Thank you for your time and we are sorry for any inconvenience. You may now close this browser window.

Screener: Non-Household

QUESTION PRESCRIBED BY OFWAT

S5. BILL PAYER STATUS

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)

SINGLE CODE

Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Please select one answer only

1	Yes	
2	No	CLOSE GO TO SCREENOUT_NHHBILLPAYER

SCREENOUT BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED

SCREENOUT_NHHBILLPAYER

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF S5=2 (Not responsible for decisions)

'We're sorry but for this survey we can only include those who are responsible for making decisions about their organisation's water and sewerage bill. Thank you for your time and we are sorry for any inconvenience. You may now close this browser window.

QUESTION BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED

S6. WATER COMPANY

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)
SINGLE CODE

How many of these premises where you are a decision maker for water and sewerage services, are supplied by [PIPE IN: D5_1 Wessex Water / Bristol Water / Bournemouth Water for water and] <FOR D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA [PIPE IN: D5_2 Wessex Water]> for sewerage services? (Please remember that you may have a different retailer who you pay for these services).

Please select one answer only

1	0	CLOSE GO TO SCREENOUT_NHHSUPPLIER
2	1	
3	2	
4	3-5	
5	6 or more	
6	Don't know - but at least 1	
7	Don't know – may not be any	CLOSE GO TO SCREENOUT_NHHSUPPLIER

SCREENOUT BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED

SCREENOUT_NHHSUPPLIER

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF S6=1,7 (No premises supplied by correct water company)

'We're sorry but for this survey we can only include decision makers for premises supplied by <PIPE IN: D5_1 Wessex Water / Bristol Water / Bournemouth Water > for water supply and] <FOR D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA [PIPE IN: D5_2 Wessex Water]> for sewerage services. Thank you for your time and we are sorry for any inconvenience. You may now close this browser window.

QUESTION BELOW IS NOT SPECIFIED BY OFWAT - ADDED BY BLUE MARBLE AS AN EXTRA SCREENER FOR NON-HOUSEHOLD

S7_NHH HOME PREMISES

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)
SINGLE CODE

Can you confirm that at least one of these premises supplied by [PIPE IN: D5_1 Wessex Water / Bristol Water / Bournemouth Water] <FOR D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA [PIPE IN: and D5_2 Wessex Water]> is a site primarily used for the purposes of your organisation? (i.e. **not** used primarily as someone's home).

Please select one answer only

1	Yes – at least one premises is primarily for the use of my organisation	
2	No	CLOSE GO TO SCREENOUT_HOMEPREMISES
3	Don't know	CLOSE GO TO SCREENOUT_HOMEPREMISES

SCREENOUT BELOW IS NOT SPECIFIED BY OFWAT - ADDED BY BLUE MARBLE

SCREENOUT_HOMEPREMISES

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF S7=2,3 (Premises are primarily domestic)

'We're sorry but for this survey we can only include decision makers for premises that are not primarily someone's home. Thank you for your time and we are sorry for any inconvenience. You may now close this browser window.

QUESTION BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED

S8_NHH_PERSPECTIVE

ASK FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)

SINGLE CODE

For the rest of this survey, we will be asking you to answer from the perspective of someone who is responsible for premises supplied by [PIPE IN: Wessex Water / Bristol Water / Bournemouth Water for water supply] and Wessex Water for sewerage services. Can you confirm that you will only answer relating to these premises in your organisation?

Please select one answer only

1	Yes	
2	No	CLOSE GO TO SCREENOUT_NHHPERSPECTIVE
3	Don't know	CLOSE GO TO SCREENOUT_NHHPERSPECTIVE

SCREENOUT BELOW REQUIRED BY OFWAT, BUT WORDING NOT PRESCRIBED

SCREENOUT_NHHPERSPECTIVE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF S8=2,3 (Does not confirm will answer from NHH perspective)

'We're sorry but in this case we cannot proceed with the survey. Thank you for your time and we are sorry for any inconvenience. You may now close this browser window.'

Affordability

D6_DUMMY_CUSTOMERTYPE

HIDDEN VARIABLE

1	household	D2=1
2	organisation	D2=2

TEXT PRESCRIBED BY OFWAT

INFO1.

SHOW ALL

Thank you. We are now going to ask you some questions about your <PIPE IN: D6 household / organisation>'s financial situation.

QUESTION PRESCRIBED BY OFWAT

Q1. ABILITY TO PAY BILLS

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLE CODE, FLIP SCALE FOR HALF

Thinking about your household's finances over the last year, how often, if at all, have you struggled to pay at least one of your household bills?

Please select one answer only

ASK IF D2=2 (NHH)

SINGLE CODE, FLIP SCALE FOR HALF

Thinking about your organisation's finances over the last year, how often, if at all, has your organisation struggled to pay at least one of its bills?

Please select one answer only

1	All of the time	
2	Most of the time	
3	Sometimes	
4	Rarely	
5	Never	

96	Prefer not to say	ANCHOR IN LAST POSITION
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QUESTION PRESCRIBED BY OFWAT
Q2. FINANCIAL CIRCUMSTANCE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLE CODE, FLIP SCALE FOR HALF

Overall, how well would you say you are managing financially now?

Please select one answer only

ASK IF D2=2 (NHH)

SINGLE CODE, FLIP SCALE FOR HALF

Overall, how well would you say your organisation is managing financially now?

Please select one answer only

1	Living comfortably	SHOW IF D2=1 (HH)
2	Doing well	SHOW IF D2=2 (NHH)
3	Doing alright	
4	Just about getting by	
5	Finding it quite difficult	
6	Finding it very difficult	
96	Prefer not to say	ANCHOR IN LAST POSITION

QUESTION PRESCRIBED BY OFWAT
Q3. FUTURE FINANCIAL CIRCUMSTANCE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLE CODE, FLIP SCALE FOR HALF

Thinking about your <PIPE IN D6 household / organisation>'s financial situation over the next few years up to 2030, do you expect it to get:

Please select one answer only

1	A lot worse	
2	A bit worse	
3	Stay the same	
4	A bit better	
5	A lot better	
96	Prefer not to say	ANCHOR IN LAST POSITION

QUESTION PRESCRIBED BY OFWAT
Q4. CURRENT BILL AFFORDABILITY

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLE CODE, FLIP SCALE FOR HALF

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

Please select one answer only

ASK IF D2=2 (NHH)

SINGLE CODE, FLIP SCALE FOR HALF

How easy or difficult is it for your company/organisation to afford to pay its current water and sewerage bill:

Please select one answer only

1	Very easy	
2	Fairly easy	
3	Neither easy nor difficult	
4	Fairly difficult	
5	Very difficult	
97	Don't know	ANCHOR IN LAST POSITION

TEXT PRESCRIBED BY OFWAT
INFO2. BILL PROFILE AFFORDABILITY 1

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW ALL

The next set of questions are about proposed changes to your <IF D2=2 NON HOUSEHOLD, PIPE IN: organisation's> water and sewerage bill for the years 2025-2030. The chart shown in the next question shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

<IF D1=3; PIPE IN: [(Please note this is the total combined bills from Bournemouth Water for your water supply and Wessex Water for your sewerage service)]>.

TEXT PRESCRIBED BY OFWAT
INFO3. BILL PROFILE AFFORDABILITY 2

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW IF D2=1 (HH)

Water bills change each in year in line with inflation. Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

SHOW IF D2=2 (NHH)

Water bills change each in year in line with inflation. Inflation is the increase in prices paid for goods and services over time. **Organisations'** incomes also change over time.

- If **income** keeps up with inflation (increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than **income**, then you are likely to have less money to go around.
- If **income** increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

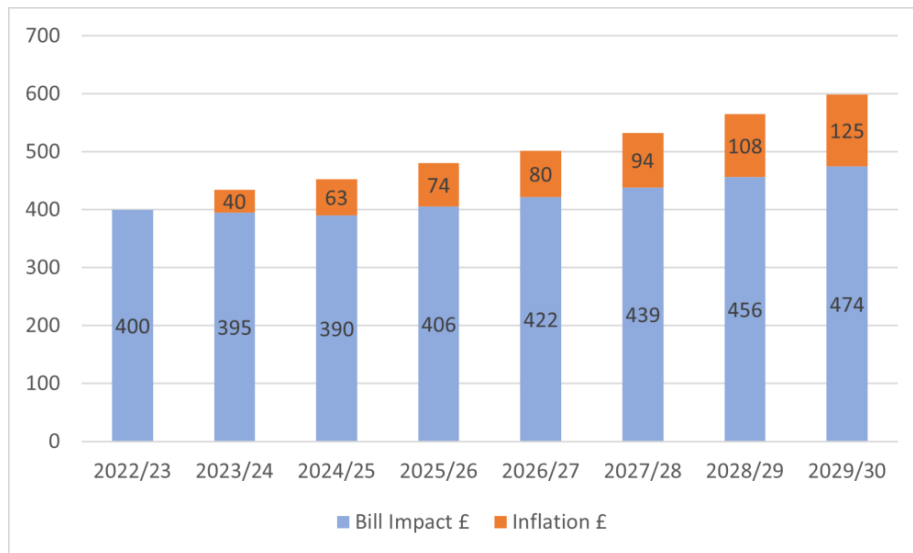
TEXT AND CHART PRESCRIBED BY OFWAT

Q5. BILL PROFILE AFFORDABILITY

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL, SHOW STIM (DYNAMIC BILL PROFILE CHART)

NOTE TO SCRIPTER: SEE SEPARATE SPEC FOR THE DYNAMIC BILL PROFILE CHART



SHOW UNDER STIM IF D2=1 (HH) AND BILL AMOUNT IS '0', '-' OR 'NULL IN THE SOURCE SPREADSHEET FOR THE CHART CALCULATION (I.E. WE HAVE USED AN AVERAGE BILL FOR THE CHART CALCULATION)

These bill amounts are based on the average household customer bill.

SHOW UNDER STIM IF D2=1 AND D3=2 (HH CUSTOMERS ON SOCIAL TARIFF)

This bill profile is based on the financial support scheme you are currently on.

SHOW UNDER STIM IF D2=2 (NHH)

This bill profile is based on **an example bill** that **an organisation** would pay to the retailer for water and sewerage, starting at £1,000 for 2022-23.

QUESTION PRESCRIBED BY OFWAT

ASK IF D2=1 (HH)

SINGLE CODE, FLIP SCALE FOR HALF

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

Please select one answer only

ASK IF D2=2 (NHH)

SINGLE CODE, FLIP SCALE FOR HALF,

How easy or difficult do you think it would be for your organisation to afford its water and sewerage bills if they went up at the same rate?

Please select one answer only

1	Very easy	
2	Fairly easy	
3	Neither easy nor difficult	
4	Fairly difficult	
5	Very difficult	
97	Don't know	ANCHOR

QUESTION PRESCRIBED BY OFWAT
Q6. COPING STRATEGIES FOR BILL INCREASES

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

 ASK IF D2=1 AND Q5=3,4,5 (HH AND NEUTRAL OR DIFFICULT TO AFFORD BILLS)
 MULTICODE, RANDOMISE

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?

Please select all that apply

1	Shopping around more	
2	Spending less on food shopping and essentials	
3	Spending less on non-essentials	
4	Cutting back on non-essential journeys in my vehicle	
5	Eat out less	
6	Using less fuel such as gas or electricity in my home	
7	Using less water	
8	Using my savings	
9	Using credit more than usual, for example, credit cards, loans, or overdrafts	
10	Ask family and friends for financial support	
11	Other (Please specify)	OPEN END, ANCHOR
97	Don't know	ANCHOR, EXCLUSIVE

Acceptability
SCRIPTER NOTE: ALWAYS SHOW BLOCK 1,2,3,4 IN THIS ORDER. ROTATE COMPONENTS WITHIN EACH BLOCK
TEXT PRESCRIBED BY OFWAT
INFO4.

SHOW IF D1=1 Wessex supply area

Thank you. We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five-year period. The plan we are showing you is for 2025-2030.

SHOW IF D1=2,3 Bristol or Bournemouth supply area

Thank you. We are now going to ask you some questions about your views on your water companies' business plans. Water companies are required to put together business plans for each five-year period. The plans we are showing you are for 2025-2030.

TEXT BELOW IS NOT PRESCRIBED BY OFWAT, BUT CLOSELY REFLECTS TEXT IN THE QUALITATIVE GUIDANCE THAT OFWAT INSTRUCT US 'SHOULD BE USED AS A STARTING POINT'. THE BELOW IS ALSO INFORMED BY COGNITIVE TESTING
INFO5.

SHOW IF D1=1 (Wessex Water)

We will now show you a number of individual parts of the business plan for Wessex Water, one at a time.

- Some parts of the plan are services that water companies have **targets** for, called 'performance commitments'. Targets are set in every five-year business plan. The targets are set based on what customers have previously told companies they would like them to do, and an assessment by Ofwat (the industry regulator) of what companies should deliver. Ofwat monitors water companies to see if they have met the service level targets each year. The parts of the plan we will show you that include targets reflect performance commitments that customers have told us are particularly important to them.

- Other parts of the plan we will show you must be done to meet environmental laws and government policy. As new laws are introduced, water companies must make plans to comply with these. These parts of the plan are highlighted as being **legally required**.
- The remaining parts of the plan we will show you are proposed investments in addition to minimum requirements and performance commitments.

What you will see is a snapshot of the full range of services companies provide. In addition to these, there are other costs that your bills will need to pay for.

On the next page you'll see the first part of Wessex Water's plan. Please read it carefully, and then click the next button to see the next part of the plan. After each set of 3 parts we'll ask you a question.

SHOW IF D1=2 (Bristol Water)

On the following pages we will show you 6 parts of the business plan for Bristol Water, one part at a time, and then 6 parts of Wessex Water's plan.

- Some parts of the plans are services that water companies have **targets** for, called 'performance commitments'. Targets are set in every five-year business plan. The targets are set based on what customers have previously told companies they would like them to do, and an assessment by Ofwat (the industry regulator) of what companies should deliver. Ofwat monitors water companies to see if they have met the service level targets each year. The parts of the plan we will show you that include targets reflect performance commitments that customers have told us are particularly important to them.
- Other parts of the plans we will show you must be done to meet environmental laws and government policy. As new laws are introduced, water companies must make plans to comply with these. These parts of the plan are highlighted as being **legally required**.
- The remaining parts of the plans we will show you are proposed investments in addition to minimum requirements and performance commitments.

What you will see is a snapshot of the full range of services companies provide. In addition to these, there are other costs that your bills will need to pay for.

On the next page you'll see the first part of Bristol Water's plan. Please read it carefully, and then click the next button to see the next part of the plan. After each set of 3 parts we'll ask you a question.

SHOW IF D1=3 (Bournemouth Water)

On the following pages we will show you 6 parts of the business plan for Bournemouth Water, one part at a time, and then 6 parts of Wessex Water's plan.

- Some parts of the plans are services that water companies have **targets** for, called 'performance commitments'. Targets are set in every five-year business plan. The targets are set based on what customers have previously told companies they would like them to do, and an assessment by Ofwat (the industry regulator) of what companies should deliver. Ofwat monitors water companies to see if they have met the service level targets each year. The parts of the plan we will show you that

include targets reflect performance commitments that customers have told us are particularly important to them.

- Other parts of the plans we will show you must be done to meet environmental laws and government policy. As new laws are introduced, water companies must make plans to comply with these. These parts of the plan are highlighted as being **legally required**.
- The remaining parts of the plans we will show you are proposed investments in addition to minimum requirements and performance commitments.

What you will see is a snapshot of the full range of services companies provide. In addition to these, there are other costs that your bills will need to pay for.

On the next page you'll see the first part of Bournemouth Water's plan. Please read it carefully, and then click the next button to see the next part of the plan. After each set of 3 parts we'll ask you a question.

NOTES ON THE FOLLOWING SECTION – DESCRIBING THE BUSINESS PLAN:

- OFWAT PRESCRIBE WHICH SIX PERFORMANCE COMMITMENTS WE MUST SHOW.
- UP TO 6 OTHER COMPONENTS CAN BE SHOWN, TO BE DETERMINED BY THE WATER COMPANY/IES.
- THE GUIDANCE PARTLY PRESCRIBES WORDING IN THE STIM FOR THE 6 PERFORMANCE COMMITMENTS.
- THE COMPARATIVE PERFORMANCE CHARTS ARE PRESCRIBED
- FOR THE ADDITIONAL 6 PLAN COMPONENTS THERE IS NO PRESCRIBED TEXT, BUT THERE ARE GUIDELINES FOR WHAT OFWAT WANT TO SEE INCLUDED.
- NB PLEASE SEE THE ACCOMPANYING POWERPOINT SLIDE PACKS FOR THE STIMULI USED

Block of business plan	Title	Main stim	Info screen
Block 1: Wessex Water Common PCs (must include)	'Water supply interruptions, lasting longer than 3 hours'	STIM1A	STIM1B
	'Reducing leaks'	STIM2A	STIM2B
	'The appearance, taste and smell of tap water'	STIM3A	STIM3B
Block 2: Wessex Water Additional components (relating to water supply)	'Installing smart water meters'	STIM4_WW_HH	-
	'Replacing lead pipes'	STIM5_WW_HH	-
	'Becoming operationally net zero'	STIM6_WW_HH	-
Block 3: Wessex Water Common PCs (must include)	'Sewage flooding of properties – inside properties'	STIM7A	STIM7B
	'Sewage flooding of gardens, outbuildings or access points'	STIM8A	STIM8B
	'Pollution of rivers or bathing waters'	STIM9A	STIM9B
Block 4: Wessex Water Additional components (relating to sewerage)	'Removing everyone from water poverty'	STIM10	-
	'Removing excess nitrogen and phosphorus from rivers and sea'	STIM11	-
	'Reducing sewage spills'	STIM12	-

FOR BLOCK 1:

QUESTION PRESCRIBED BY OFWAT

Q7a. MOST IMPORTANT COMPONENT

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLE CODE, FLIP SCALE FOR HALF

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

Please select one answer only

1	PIPE IN COMPONENT 1 TITLE <Water supply interruptions, lasting longer than 3 hours>	
2	PIPE IN COMPONENT 2 TITLE <Reducing leaks>	
3	PIPE IN COMPONENT 3 TITLE <The appearance, taste and smell of tap water>	
97	Don't know/Can't say	ANCHOR

FOR BLOCK 2:

QUESTION PRESCRIBED BY OFWAT

Q7b. MOST IMPORTANT COMPONENT

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLE CODE, FLIP SCALE FOR HALF

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

Please select one answer only

1	PIPE IN COMPONENT 4 TITLE FOR WESSEX SUPPLY AREA < Installing smart water meters>	
2	PIPE IN COMPONENT 5 TITLE FOR WESSEX SUPPLY AREA < Replacing lead pipes>	
3	PIPE IN COMPONENT 6 TITLE FOR WESSEX SUPPLY AREA <Becoming operationally net zero>	
97	Don't know/Can't say	ANCHOR

QUESTION PRESCRIBED BY OFWAT

FOR BLOCK 3:

Q7c. MOST IMPORTANT COMPONENT

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLE CODE, FLIP SCALE FOR HALF

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

Please select one answer only

1	PIPE IN COMPONENT 7 TITLE <Sewage flooding of properties – internal>	
2	PIPE IN COMPONENT 8 TITLE <Sewage flooding of properties – external>	
3	PIPE IN COMPONENT 9 TITLE < Pollution of rivers and bathing waters >	
97	Don't know/Can't say	ANCHOR

QUESTION PRESCRIBED BY OFWAT

FOR BLOCK 4:

Q7d. MOST IMPORTANT COMPONENT

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLE CODE, FLIP SCALE FOR HALF

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

Please select one answer only

1	PIPE IN COMPONENT 10 TITLE <Removing everyone from water poverty>	
2	PIPE IN COMPONENT 11 TITLE <Preventing excess nitrogen and phosphorous from entering rivers and sea>	
3	PIPE IN COMPONENT 12 TITLE <Reducing sewage spills>	
97	Don't know/Can't say	ANCHOR

NOT PRESCRIBED – BUT IN GUIDANCE Q&A A SIMPLE ON A PAGE SUMMARY IS MENTIONED

INFO5b.

SHOW ALL

Here is a quick reminder of what's included in the proposed business plans for [PIPE IN: D5_1 Wessex Water / Bristol Water / Bournemouth Water] <FOR D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA [PIPE IN: and D5_2 Wessex Water]> for 2025-30. This summarises key elements of the plans, and does not include everything that the plans will cover. Once you have read it, please select 'Next' at the bottom of the screen to continue.

SHOW STIM 13

PLEASE SEE THE ACCOMPANYING POWERPOINT SLIDE PACKS FOR THE STIMULI USED

QUESTION PRESCRIBED BY OFWAT
Q8. ACCEPTABILITY OF OVERALL PLAN

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D1=1

SINGLE CODE, FLIP SCALE FOR HALF

Based on everything you have seen and read about <PIPE IN D1>'s proposed business plan, how acceptable or unacceptable is it to you?

Please select one answer only

ASK IF D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA

SINGLE CODE, FLIP SCALE FOR HALF

 Based on everything you have seen and read about [PIPE IN D5_1 Bristol Water / Bournemouth Water] and [PIPE IN: D5_2 Wessex Water]'s proposed business plans, how acceptable or unacceptable are they to you? *(Please give one answer, thinking about everything in the two companies' plans' overall; you will have a chance later on to give your answer for each individual company's plan.)*

Please select one answer only

1	Completely acceptable	
2	Acceptable	
3	Unacceptable	
4	Completely unacceptable	
97	Don't know/Can't say	ANCHOR

QUESTION PRESCRIBED BY OFWAT
A8a. REASONS WHY OVERALL PLAN NOT ACCEPTABLE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF Q8=3/4 (SINGLE COMPANY AND NOT ACCEPTABLE)

MULTICODE UP TO 2, RANDOMISE

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

Please choose up to two answers only

1	The bill increases are too expensive	
2	Company profits are too high	
3	Companies should pay for service improvements	
4	I expect better service improvements	
5	The plan is poor value for money	
6	Compared to energy prices it is more expensive	
7	I am dissatisfied with current services	
8	The plans don't focus on the right services	
9	I won't be able to afford this	
10	I don't trust them to make these service improvements	
45	Other 1 (Please specify <D1=2,3 PIPE IN: [: If you think this applies to just one company, write in which]>)	ANCHOR, OPEN END
46	Other 2 (Please specify <D1=2,3 PIPE IN: [: If you think this applies to just one company, write in which]>)	ANCHOR, OPEN END
97	Don't know/Can't say	ANCHOR, EXCLUSIVE

QUESTION BELOW NOT PRESCRIBED – ADDED IN FOR THE COMBINED COMPANY SURVEYS TO GIVE OPPORTUNITY FOR RESPONDENTS TO EXPLAIN WHICH COMPANY'S PLANS THEY FELT THE ANSWER APPLIED TO
A8a2. REASONS WHY OVERALL PLAN NOT ACCEPTABLE – OPEN ENDS

FOR BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF A8a= 2,4,7,8,10

OPEN END

You just said: <ANSWER CODE>. Please write in below if you think this applies to one of the companies in particular.

QUESTION PRESCRIBED BY OFWAT**A8b. REASONS WHY OVERALL PLAN IS ACCEPTABLE**

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF Q8=1/2 (ACCEPTABLE)

MULTICODE UP TO 2, RANDOMISE

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

Please choose up to two answers only

1	The plan is good value for money	
2	The plan is affordable	
3	Compared to energy prices it's cheaper	
4	Their plans seem to focus on the right services	
5	The company provides a good service now	
6	I support what they are trying to do in the long term	
7	The change to my bill is small	
8	I trust them to do what's best for customers	
9	I have been dissatisfied with the service recently but am pleased that they are making improvements	
45	Other 1 (Please specify)	ANCHOR, OPEN END
46	Other 2 (Please specify)	ANCHOR, OPEN END
97	Don't know/Can't say	ANCHOR, EXCLUSIVE

QUESTION BELOW NOT PRESCRIBED – ADDED IN FOR THE COMBINED COMPANY SURVEYS TO GIVE OPPORTUNITY FOR RESPONDENTS TO EXPLAIN WHICH COMPANY'S PLANS THEY FELT THE ANSWER APPLIED TO
Q8b2. REASONS WHY OVERALL PLAN IS ACCEPTABLE – OPEN ENDS

FOR BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF A8b= 4,5,8,9

OPEN END

You just said: <ANSWER CODE>. Please write in below if you think this applies to one of the companies in particular.

QUESTION PRESCRIBED BY OFWAT**Q9. PREFERRED PHASING**

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLECODE, DO NOT RANDOMISE

Long term investment by [PIPE IN D5_1] Wessex Water / Bristol Water / Bournemouth Water <FOR D1=2,3 BRISTOL OR BOURNEMOUTH SUPPLY AREA PIPE IN: and D5_2 Wessex Water > 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?

Please select one answer only

1	An increase in bills starting sooner, spreading increases across different generations of bill-payers	
2	An increase in bills starting later, putting more of the increases onto younger and future bill-payers	
3	I don't know enough at the moment to give an answer	

QUESTION BELOW NOT PRESCRIBED AS STANDARD BUT REPEATING ACCEPTABILITY FOR WATER ONLY AND SEWERAGE ONLY PARTS OF THE PLAN IS REQUIRED IN COMBINED COMPANY RESEARCH IN THE GUIDANCE. WE ALSO DECIDED TO INCLUDE IT FOR THE WESSEX SUPPLY AREA IN CASE REQUIRED

Q10a. ACCEPTABILITY OF OVERALL PLAN – WATER COMPANY

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLE CODE, FLIP SCALE FOR HALF

Now please think specifically about [PIPE IN D5_1]'s proposed plan for water supply services. The key elements of the plan are summarised again below. Based on everything you have seen and read about [PIPE IN **D5_1 Wessex Water / Bristol Water / Bournemouth Water**]'s proposed business plan, how acceptable or unacceptable is it to you?

DISPLAY STIM 14 (ONE PAGE SUMMARY)

PLEASE SEE THE ACCOMPANYING POWERPOINT SLIDE PACKS FOR THE STIMULI USED

STIM IS NOT PRESCRIBED – GUIDANCE Q&A MENTIONS SIMPLE ONE PAGE PLAN SUMMARY

Please select one answer only

1	Completely acceptable	
2	Acceptable	
3	Unacceptable	
4	Completely unacceptable	
97	Don't know/Can't say	ANCHOR

QUESTION BELOW NOT PRESCRIBED AS STANDARD BUT REPEATING ACCEPTABILITY FOR WATER ONLY AND SEWERAGE ONLY PARTS OF THE PLAN IS REQUIRED IN COMBINED COMPANY RESEARCH IN THE GUIDANCE. WE ALSO DECIDED TO INCLUDE IT FOR THE WESSEX SUPPLY AREA IN CASE REQUIRED

Q10b. ACCEPTABILITY OF OVERALL PLAN – SEWERAGE COMPANY

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK ALL

SINGLE CODE, FLIP SCALE FOR HALF

Based on everything you have seen and read about Wessex Water's proposed plan for sewerage services. The key elements of the plan are summarised again below. Based on everything you have seen and read about Wessex Water's proposed business plan for sewerage services, how acceptable or unacceptable is it to you?

DISPLAY STIM 15

PLEASE SEE THE ACCOMPANYING POWERPOINT SLIDE PACKS FOR THE STIMULI USED

STIM IS NOT PRESCRIBED – GUIDANCE Q&A MENTIONS SIMPLE ONE PAGE PLAN SUMMARY

Please select one answer only

1	Completely acceptable	
2	Acceptable	
3	Unacceptable	
4	Completely unacceptable	
97	Don't know/Can't say	ANCHOR

Household demographics

QUESTION PRESCRIBED BY OFWAT

Q11. GENDER

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLECODE, DO NOT RANDOMISE

In which of the following ways do you identify?

Please select one answer only

1	Female	
2	Male	
3	I identify in another way	
96	Prefer not to say	

QUESTION PRESCRIBED BY OFWAT**Q12. OCCUPATION**

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

SINGLECODE, DO NOT RANDOMISE

Please indicate which one of the following best describes the profession of the chief income earner in your household

Please select one answer only

1	High managerial, administrative or professional e.g., doctor, lawyer, medium / large company director (50+ people)	
2	Intermediate managerial, administrative or professional e.g., teacher, manager, accountant	
3	Supervisor, administrative or professional e.g., police officer, nurse, secretary, self-employed	
4	Skilled manual worker e.g., mechanic, plumber, electrician, lorry driver, train driver	
5	Semi-skilled or unskilled manual worker e.g., waiter, factory worker, receptionist, labourer	
6	Housewife / househusband	
7	Unemployed	
8	Student	
9	Retired	
96	Prefer not to say	

QUESTION PRESCRIBED BY OFWAT**Q13. OCCUPATION RETIRED**

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 AND Q12=9 (HH AND RETIRED)

SINGLECODE, DO NOT RANDOMISE

Please indicate which one of the following best describes the profession of the chief income earner in your household before retirement?

Please select one answer only

1	High managerial, administrative or professional e.g., doctor, lawyer, medium / large company director (50+ people)	
2	Intermediate managerial, administrative or professional e.g., teacher, manager, accountant	
3	Supervisor, administrative or professional e.g., police officer, nurse, secretary, self-employed	
4	Skilled manual worker e.g., mechanic, plumber, electrician, lorry driver, train driver	
5	Semi-skilled or unskilled manual worker e.g., waiter, factory worker, receptionist, labourer	

6	Housewife / househusband	
7	Unemployed	
8	Student	
96	Prefer not to say	

PRESCRIBED BY OFWAT
D6 OCCUPATION (SEG)

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

HIDDEN VARIABLE

1	A	Q12/13=1
2	B	Q12/13=2
3	C1	Q12/13=3/8
4	C2	Q12/13=4
5	D	Q12/13=5
6	E	Q12/13=6/7

QUESTION PRESCRIBED BY OFWAT
Q14. VULNERABLE CUSTOMERS

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH)

MULTICODE, DO NOT RANDOMISE

Which of the following apply to you?

We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion.

Please select all that apply

1	I or another member of my household is disabled or suffer(s) from a debilitating illness	
2	I or another member of my household have/has a learning difficulty	
3	I or another member of my household relies on water for medical reasons	
4	I or another member of my household is visually impaired (i.e., struggles to read even with glasses)	
5	I or another member of my household am/is over the age of 75 years old	
6	I or another member of my household speaks English as a second language	
7	I or another member of my household is deaf or hard of hearing	
8	I or another member of my household is a new parent	
9	None of these apply to me	EXCLUSIVE
96	Prefer not to say	EXCLUSIVE

PRESCRIBED BY OFWAT
D7. VULNERABLE CUSTOMERS

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

HIDDEN VARIABLE

1	Medical vulnerability	Q13=1-3
2	Communications vulnerability	Q13=4,6,7
3	Life stage vulnerability	Q13=5,8
4	Any vulnerability	Q13=1-8

QUESTION PRESCRIBED BY OFWAT
Q15. ETHNICITY ENGLAND

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH) IN ENGLAND

SINGLE CODE

What is your ethnic group? Choose one option that best describes your ethnic group or background

Please select one answer only

	White	
1	English/Welsh/Scottish/Northern Irish/British	
2	Irish	
3	Gypsy or Irish Traveller	
4	Any other White background, please describe	OPEN END
	Mixed/Multiple ethnic groups	
5	White and Black Caribbean	
6	White and Black African	
7	White and Asian	
8	Any other Mixed/Multiple ethnic background, please describe	OPEN END
	Asian/Asian British	
9	Indian	
10	Pakistani	
11	Bangladeshi	
12	Chinese	
13	Any other Asian background, please describe	OPEN END
	Black/ African/Caribbean/Black British	
14	African	
15	Caribbean	
16	Any other Black/African/Caribbean background, please describe	OPEN END
	Other ethnic group	
17	Arab	
18	Any other ethnic group, please describe	OPEN END
96	Prefer not to say	

QUESTION PRESCRIBED BY OFWAT
Q16. INCOME

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH), SINGLE CODE

Which of the following bands does your household income fall into from all sources before tax and other deductions?

Please select one answer only

1	Up to £199 a week/Up to £10,399 a year	
2	From £200 to £299 a week/From £10,400 to £15,599 a year	
3	From £300 to £499 a week/From £15,600 to £25,999 a year	
4	From £500 to £699 a week/From £26,000 to £36,399 a year	
5	From £700 to £999 a week/From £36,400 to £51,999 a year	
6	From £1,000 to £1,399 a week/From £52,000 to £72,799 a year	
7	From £1,400 to £1,999 a week/From £72,800 to £103,999 a year	
8	£2,000 and above a week/£104,000 and above a year	
97	Don't know	
96	Prefer not to say	

Non-household demographics
QUESTION PRESCRIBED BY OFWAT
Q17. SERVICE USE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)

SINGLE CODE

How does your organisation mainly use water at its premises?

Please select all that apply

1	For the manufacturing process which is essential to the running of your organisation (e.g., to power machinery, agricultural production etc)	
2	For the supply of services your organisation provides (e.g., cleaning services etc)	
3	For an ingredient or part of the product or service your organisation provides (e.g., food or drink, chemical, cosmetics manufacturer etc)	
4	For normal domestic use for your organisation's customers and employees (e.g., customer toilets, supply of drinking water)	
5	None of the above	
97	Don't know	

QUESTION PRESCRIBED BY OFWAT
Q18. NUMBER OF SITES

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)

SINGLE CODE

How many sites in the UK does your organisation operate from?

Please select one answer only

1	1	
2	2	
3	3	
4	4	
5	5-10	
6	11-50	
7	51-250	
8	250+	
96	Prefer not to say	

QUESTION PRESCRIBED BY OFWAT
Q19. NUMBER OF EMPLOYEES

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)

SINGLE CODE

How many employees does your organisation have in the UK?

Please select one answer only

1	0 (Sole trader)	
2	1-9 employees (micro)	
3	10-49 employees (small)	
4	50-249 employees (medium)	
5	250+ employees (large)	
96	Prefer not to say	

QUESTION PRESCRIBED BY OFWAT
Q20. SECTOR

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=2 (NHH)

SINGLE CODE

Which of the following best defines the core activity of your organisation?

Please select one answer only

1	Agriculture, forestry, and fishing	
2	Mining and quarrying	
3	Energy or water service & supply	
4	Manufacturing	
5	Construction	
6	Transport and storage	
7	Hotels & catering	
8	IT and Communication	
9	Finance and insurance activities	
10	Real estate activities	
11	Professional, scientific and technical activities	
12	Administrative and Support Service activities	
13	Public administration and defence	
14	Education	
15	Human health and social work activities	
16	Arts, entertainment, and recreation	
17	Other service activities	
19	Other Please specify	OPEN END
96	Prefer not to say	

Segment definitions
ADDITIONAL QUESTION SUGGESTED BY BLUE MARBLE. EXTRA CLASSIFICATION PERMITTED HERE BY OFWAT
QX2. WATER SAVING

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH), SINGLE CODE. FLIP SCALE FOR HALF

How much effort do you make at home to save water? Please select one answer only

1	A great deal	
2	A fair amount	
3	Some effort	
4	Not much effort	
5	None	ANCHOR

ADDITIONAL QUESTION SUGGESTED BY BLUE MARBLE. EXTRA CLASSIFICATION PERMITTED HERE BY OFWAT
QX3. COMMUNITY INVOLVEMENT

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH), MULTI CODE. RANDOMISE ORDER

And please tell us which, if any, of these apply to you?

1	I volunteer for a local organisation or local charity	
2	I'm a member of an online group (like facebook) <u>for people living in my area</u>	
3	I'm a member of a <u>local</u> action group like Neighbourhood Watch, floodwatch, a conservation group or the Parish Council	
4	I often pick up litter near where I live	

5	I have reported overflowing drains or leaking pipes <u>in my neighbourhood</u>	
6	I have used or recommended companies because they do things for the <u>local community</u> like sponsoring a local team, or donating to a local charity	
7	I'm more involved in my local community since Covid-19	
8	None of these	ANCHOR, EXCLUSIVE

ADDITIONAL QUESTION REQUIRED TO ADMINISTER INCENTIVES
Q22. INCENTIVE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

ASK IF D2=1 (HH), SINGLE CODE

Please indicate below how you would like us to send you the £5 voucher once you have completed this questionnaire and submitted it? *Details you give us will be used solely for the purpose of issuing your voucher to you. Your details will be held for 8 weeks following the close of the survey before being securely deleted*

Please select one answer only

1	Amazon voucher, by email (WRITE IN EMAIL WE SHOULD SEND TO)	OPEN END
2	Send Love2shop voucher in the post to the name and address your water companies have for you	
3	Send Love2shop voucher in the post to a different address (PLEASE WRITE IN FULL DETAILS)	OPEN END
4	Prefer not to receive the £5 voucher	

ASK IF D2=2 (NHH), SINGLE CODE

Please indicate below if you would prefer to receive a voucher or for us to make a donation to Water Aid, once you have completed this questionnaire. If you select the voucher, you will need to write in the email address you would like us to send it to.

Details you give us will be used solely for the purpose of issuing your voucher to you. Your details will be held for 8 weeks following the close of the survey before being securely deleted.

Please select one answer only

1	Please send me a £25 Amazon voucher (WRITE IN EMAIL WE SHOULD SEND TO)	OPEN END
2	Please make a £25 donation to Water Aid	
3	Prefer not to receive the voucher or make a donation	

PRESCRIBED BY OFWAT
INFO6. THANK AND CLOSE

FOR WESSEX, BRISTOL AND BOURNEMOUTH SUPPLY AREAS

SHOW ALL

Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills.

More information about this can be found here: <add link to the financial support area of water company / companies website(s)>

<IF D1=1,2,3 SHOW> For Wessex Water: <https://www.wessexwater.co.uk/bills-and-accounts/help-to-pay-your-bill>

<IF D1=3 SHOW> For Bournemouth Water: <https://www.bournemouthwater.co.uk/bills/need-help-paying-your-bill/>

<IF D1=2 SHOW> For Bristol Water: <https://www.bristolwater.co.uk/home/account-and-services/bills-and-payments/get-help-with-paying-your-bill>

Thank you for taking part in this research. You may now close this browser window.


Affordability and Acceptability Testing

Quantitative Stage


Plan stimuli – Wessex Water Final



Please read the description, and the table showing how water companies perform on this



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 Wessex 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.
Wessex Water's performance on this measure is currently 4 minutes and 12 seconds.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	The length of time properties are without water will continue to meet the current target of 5 minutes.
How will they do it?	<ul style="list-style-type: none"> Maintain current level of investment in the water supply network.
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




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.

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Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	The length of time properties are without water will continue to meet the current target of 5 minutes.
How will they do it?	<ul style="list-style-type: none"> Maintain current level of investment in the water supply network.
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.


Wessex Water perform 6th out of 17 companies overall on this measure:

	min:sec	
Portsmouth Water	02:21	<div style="color: green; font-size: 2em;">↑</div> <p style="margin: 0;">Better performance</p> <div style="color: red; font-size: 2em;">↓</div> <p style="margin: 0;">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	

Please read the description, and the table showing how water companies perform on this



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 Wessex 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).
On average 103 litres of water are lost per property per day in the Wessex Water region.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce the amount lost from 103 to 90 litres per property per day, and so reduce the amount of water Wessex Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> Improving the use of data to identify leaks quicker and easier Fixing more leaks in their water pipes.
Cost on bill	This will add £6 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.

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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).
On average 103 litres of water are lost per property per day in the Wessex Water region.
Wessex Water met their target for this metric last year.

What is the plan for this?

Benefit by 2030	Reduce the amount lost from 103 to 90 litres per property per day, and so reduce the amount of water Wessex Water need to take from the environment.
How will they do it?	<ul style="list-style-type: none"> Improving the use of data to identify leaks quicker and easier Fixing more leaks in their water pipes.
Cost on bill	Based on an example annual bill of £1000 today, this will add £13 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.

Wessex Water perform 9th out of 19 companies overall on this measure:

	Litres / day
Bristol Water	65.0
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



Better performance




Worse performance

STIM3A_WW_HH


STIM3A_WW_NHH

STIM3B_WW_NHH

Please read the description, and the table showing how water companies perform on this



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 Wessex 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. Currently there are 1.17 contacts made to Wessex Water per 1,000 population.
Wessex 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 1.17 to 1 per 1,000 population
How will they do it?	<ul style="list-style-type: none"> Better targeting of pipes that need replacing Keeping customers informed about work that might affect the water.
Cost on bill	This will add £2 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 Wessex 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. Currently there are 1.17 contacts made to Wessex Water per 1,000 population.
Wessex 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 1.17 to 1 per 1,000 population
How will they do it?	<ul style="list-style-type: none"> Better targeting of pipes that need replacing Keeping customers informed about work that might affect the water.
Cost on bill	Based on an example annual bill of £1000 today, this will add £4 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.

Wessex Water perform 11th out of 17 companies overall on this measure:

	Contacts per 1,000 population	
Portsmouth Water	0.41	 <p>Better performance</p>
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	 <p>Worse performance</p>
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	

STIM4_WW_HH



What does this mean? Smart meters monitor the flow of water into properties. This means there is no need for manual meter readings and that people can see more detail of their water use more regularly to help them save water.

They can also help identify leaks inside homes (e.g. leaking toilets and taps) and from underground water pipes.

What is the current situation? Just over 70% of households in the Wessex Water region have a basic water meter that is read twice a year, but none have a smart water meter.

What is the plan for this?

Benefit by 2030	Reduce water usage and leaks, which reduces the amount of water that has to be taken from the environment by 10 million litres a day, and can save customers money on their bill.
How will they do it?	<ul style="list-style-type: none"> • A programme of installing smart meters for all • 75% of all properties will have a smart meter by 2030 (490,000 installed).
Cost on bill	This will add £13 to the average annual bill (excluding inflation) by 2030.

STIM4_WW_NHH



What does this mean? Smart meters monitor the flow of water into properties. This means there is no need for manual meter readings and that people can see more detail of their water use more regularly to help them save water.

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What is the current situation? Just over 70% of households in the Wessex Water region have a basic water meter that is read twice a year, but none have a smart water meter.

What is the plan for this?

Benefit by 2030	Reduce water usage and leaks, which reduces the amount of water that has to be taken from the environment by 10 million litres a day, and can save customers money on their bill.
How will they do it?	<ul style="list-style-type: none"> • A programme of installing smart meters for all • 75% of all properties will have a smart meter by 2030 (490,000 installed).
Cost on bill	Based on an example annual bill of £1000 today, this will add £29 to the annual bill by 2030 (excluding inflation).

STIM5_WW_HH



Replacing lead pipes



What does this mean? Lead was banned as a plumbing material in the 1970s but lead pipes still connect some customers' properties to the water mains. These lead service pipes are jointly owned by customers, and Wessex Water.

What is the current situation? It is estimated that lead pipes affect 100,000 properties in the region (18%). Between 2020-25, Wessex Water will have replaced 9,000 customer-owned lead pipes.

What is the plan for this?

Benefit by 2030	Replace a further 12,000 lead pipes between 2025-30, to reduce the number of customers at risk of exposure to lead traces in their water.
How will they do it?	<ul style="list-style-type: none"> Continuing with further lead pipe replacement Offering a grant to customers if Wessex Water can't replace their lead pipes for any reason
Cost on bill	This will add £2 to the average annual bill (excluding inflation) by 2030.

STIM5_WW_NHH



Replacing lead pipes




What does this mean? Lead was banned as a plumbing material in the 1970s but lead pipes still connect some customers' properties to the water mains. These lead service pipes are owned by customers, and not Wessex Water.

What is the current situation? It is estimated that lead pipes affect 100,000 properties in the region (18%). Between 2020-25, Wessex Water will have replaced 9,000 customer-owned lead pipes.

What is the plan for this?

Benefit by 2030	Replace a further 12,000 lead pipes between 2025-30, to reduce the number of customers at risk of exposure to lead traces in their water.
How will they do it?	<ul style="list-style-type: none"> Continuing with further lead pipe replacement Offering a grant to customers if Wessex Water can't replace their lead pipes for any reason
Cost on bill	Based on an example annual bill of £1000 today, this will add £5 to the annual bill by 2030 (excluding inflation).

STIM 6_WW_HH

FOR YOU. FOR LIFE. **Becoming operationally net zero** 


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.

What is the current situation? Wessex Water emit carbon when running their sites, running vehicles and when using chemicals to treat water. Wessex Water also emit greenhouse gases from their treatment processes.

What is the plan for this?

Benefit by 2030	By 2030 Wessex Water's operations will not contribute to climate change.
How will they do it?	<p>The company will make their operations carbon neutral by 2030 by:</p> <ul style="list-style-type: none"> • Building infrastructure to charge electric vehicles, and start moving their vehicles to electric power • Increasing renewable electricity use and generating greener electricity on their own sites • Reducing energy and chemical use • Reducing emissions from treatment processes.
Cost on bill	This will add £6 to the average annual bill (excluding inflation) by 2030.

STIM 6_WW_NHH

FOR YOU. FOR LIFE. **Becoming operationally net zero** 

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.

What is the current situation? Wessex Water emit carbon when running their sites, running vehicles and when using chemicals to treat water. Wessex Water also emit greenhouse gases from their treatment processes.


What is the plan for this?

Benefit by 2030	By 2030 Wessex Water's operations will not contribute to climate change.
How will they do it?	<p>The company will make their operations carbon neutral by 2030 by:</p> <ul style="list-style-type: none"> • Building infrastructure to charge electric vehicles, and start moving their vehicles to electric power • Increasing renewable electricity use and generating greener electricity on their own sites • Reducing energy and chemical use • Reducing emissions from treatment processes.
Cost on bill	Based on an example annual bill of £1000 today, this will add £10 to the annual bill by 2030 (excluding inflation).

Please read the description, and the table showing how water companies perform on this

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

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	Based on an example annual bill of £1000 today, this will add £5 to the annual bill by 2030 (excluding inflation).

FOR YOU. FOR LIFE.
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="margin-bottom: 10px;">↑ Better performance</div> <div style="margin-bottom: 10px;">↑</div> <div style="margin-bottom: 10px;">↓</div> <div>↓ 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

Please read the description, and the table showing how water companies perform on this

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.

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	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 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: green; font-size: 2em; margin-bottom: 10px;">↑</div> <div style="color: red; font-size: 2em; margin-bottom: 10px;">↓</div> <div style="color: red; font-weight: bold;">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

Please read the description, and the table showing how water companies perform on this



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.



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	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 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
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




Better performance




Worse performance

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

STIM 10_WW_HH



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

STIM 10_WW_NHH



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.

STIM11_WW_HH

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.

STIM11_WW_NHH

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).

STIM12_WW_HH



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.

STIM12_WW_NHH



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).

STIM13_WW_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
 Continue to meet the current target for duration properties are without water	£0
 Reduce leakage from 103 to 90 litres per property per day	£6
 Reduce contacts about appearance, taste and smell of tap water from 1.17 to 1 per 1,000 population	£2
 Install smart water meters in 75% of properties	£13
 Replace 12,000 customer lead pipes	£2
 Become operationally net zero	£6
 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 & 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.

STIM13_WW_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
 Continue to meet the current target for duration properties are without water	£0
 Reduce leakage from 103 to 90 litres per property per day	£13
 Reduce contacts about appearance, taste and smell of tap water from 1.17 to 1 per 1,000 population	£4
 Install smart water meters in 75% of properties	£29
 Replace 12,000 customer lead pipes	£5
 Become operationally net zero	£10
 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 & 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** (excluding inflation) on to an example current annual bill of £1,000 by 2030.







STIM14_WW_HH

STIM14_WW_NHH



Wessex Water's plan for water supply 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
 Continue to meet the current target for duration properties are without water	£0
 Reduce leakage from 103 to 90 litres per property per day	£6
 Reduce contacts about appearance, taste and smell of tap water from 1.17 to 1 per 1,000 population	£2
 Install smart water meters in 75% of properties	£13
 Replace 12,000 customer lead pipes	£2
 Become operationally net zero	£6







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

Note: None of these elements are legally required



Wessex Water's plan for water supply 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
 Continue to meet the current target for duration properties are without water	£0
 Reduce leakage from 103 to 90 litres per property per day	£13
 Reduce contacts about appearance, taste and smell of tap water from 1.17 to 1 per 1,000 population	£4
 Install smart water meters in 75% of properties	£29
 Replace 12,000 customer lead pipes	£5
 Become operationally net zero	£10

£/yr means the **added amount** (excluding inflation) on to an example current annual bill of £1,000 by 2030.

Note: None of these elements are legally required

STIM15_WW_HH

STIM15_WW_NHH








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
 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 (Legally required)	£57
 Reduce sewage spills at 148 sites, focusing on sensitive sites (Legally required)	£23

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 (Legally required)	£137
 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.

Affordability and Acceptability Testing

Quantitative Stage

Plan stimuli – final

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** 

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.


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	 Better performance
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	 Worse performance
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



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 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



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 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	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


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.

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


	Litres / day
Bristol Water	65.0
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




Better performance



Worse performance



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.



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	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	<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>
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




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	Based on an example annual bill of £1000 today, this will add £37 to the annual bill by 2030 (excluding inflation).



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.



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	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

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.
- 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).

Please read the description, and the table showing how water companies perform on this

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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.

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Wessex Water
YTL GROUP

Sewage flooding of properties – internal



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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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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="margin-bottom: 10px;">Better performance</div> <div style="margin-bottom: 10px;">↑</div> <div style="margin-bottom: 10px;">e</div> <div style="margin-bottom: 10px;">↓</div> <div style="margin-bottom: 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

Please read the description, and the table showing how water companies perform on this



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.



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).

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="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

Please read the description, and the table showing how water companies perform on this

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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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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).

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

STIM 10_BW_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



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.

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

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Wessex Water
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Preventing excess nitrogen and phosphorous from entering rivers and sea

Legally required

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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.

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.













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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_BW_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 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.

STIM 13_BW_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 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

STIM 15_BRBW_WW_HH

STIM 15_BRBW_WW_NHH (NEW 28072023)









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.

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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

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** on to the **average** current annual bill (excluding inflation) by 2030

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



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Affordability and Acceptability Testing


Quantitative Stage

Plan stimuli – final

Bristol 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 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.



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.


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	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="color: green; font-size: 2em; margin-bottom: 10px;">↑</div> <div style="color: red; font-size: 2em;">↓</div> </div> <p style="font-size: 0.8em; margin-top: 10px;">Better performance</p> <p style="font-size: 0.8em; margin-top: 10px;">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	



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




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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: 20px;">↑ Better performance</div> <div style="margin-bottom: 20px;">↓ 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




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	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	<div style="color: green; font-size: 2em;">↑</div> <p style="margin: 0;">Better performance</p>
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	<div style="color: red; font-size: 2em;">↓</div> <p style="margin: 0;">Worse performance</p>
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	



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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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	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.



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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?	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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- 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).

Please read the description, and the table showing how water companies perform on this

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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).

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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="margin-bottom: 10px;">Better performance</div> <div style="margin-bottom: 10px;">↑</div> <div style="margin-bottom: 10px;">e</div> <div style="margin-bottom: 10px;">↓</div> <div style="margin-bottom: 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

STIM 10_WW_HH



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



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.

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

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

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Wessex Water
YTL GROUP

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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.

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.

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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

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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	£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.	

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
 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



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