



Consumer Council for Water

Annual Tracking Survey 2006

Submitted to

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Contents

Page

1	Executive summary	1
2	Background and Methodology	5
3	Profile of Respondents	8
4	Value for money	14
5	Consumer Rights and Responsibilities	21
6	Water on Tap	38
7	Flush and go	45
8	Speaking up for water consumers	49
	Appendices	57

1 Executive summary

Background and Methodology

The Consumer Council for Water (CCWater) is a public funded body whose purpose is to represent customers of water and sewerage companies in order to improve standards and value for money. CCWater operates through nine regional committees in England and a committee in Wales, and came into operation on 1st October 2005. CCWater commissioned ORC International to conduct their first annual tracking survey that aims to identify customers' concerns about water and sewerage services as well as enabling the measurement of year on year changes to determine where CCWater has added value.

ORC International designed a 20 minute telephone survey in conjunction with CCWater. A total of 2,000 respondents took part in the survey between 13th November and 8th December 2006. The survey was divided into five themes, of which the key findings for each are summarised below.

Value for money

82% of people say their bill for water and sewerage services is clear and understandable. Those in the Thames region were least likely to agree their bill was clear.

69% of people were satisfied that they receive value for money from their water services. Dissatisfaction with value for money is highest in the South West region.

78% of people were satisfied that they receive value for money from their sewerage services. Dissatisfaction with value for money is highest in the South West and Eastern regions.

The most commonly stated reason for respondents saying they're not satisfied with value for money from their water or sewerage services are that they are 'too expensive'.

57% agreed that the water and sewerage charges they pay are fair. Those in the South West were most likely to disagree that charges were fair in comparison to those in other regions and Wales.

63% agreed that the water and sewerage charges they pay are affordable. Those in Northumbria were most likely to agree that charges were affordable.

Consumer rights and responsibilities

There is a high level of awareness that bills could be paid by direct debit and in instalments (93% and 91%), and awareness that customers could talk to their water company if they had problems paying (81%). Awareness of these options was lowest in the Thames region.

50% of unmetered customers knew they could have a water meter fitted free of charge and 20% knew that if they had a water meter fitted they had 12 months to decide whether they were happy with it and could revert back to unmeasured charges. Unmetered respondents in the South West tended to be more aware than in other regions and Wales.

12% were aware of the vulnerable groups' tariff, with 1% subscribing. The highest levels of awareness are in Eastern and South West regions.

28% were aware of the services for elderly and/ or disabled customers, with 2% subscribing. The highest level of awareness was in the Eastern region.

60% of respondents (excluding council tenants) correctly identified themselves/ their landlord as being responsible for maintaining water and sewerage pipes at their property; with those in the South West more likely to be correct with regards to water pipe maintenance and those in Wessex more likely to be correct with regards to sewerage pipe maintenance.

There was a lower level of correct identification of responsibility among council tenants. 45% of council tenants correctly identified their local council as responsible for water pipe maintenance and 50% correctly identified their local council as responsible for sewerage pipe maintenance. Those in Eastern and Midlands regions were most likely to correctly identify their local council's responsibility for water pipe maintenance and those in the Midlands were also most likely to correctly identify their local council's responsibility for sewerage pipe maintenance.

39% of respondents were aware that if their water company failed to meet its service delivery standards they were entitled to compensation. Awareness of compensation was lowest in the Thames region.

Just 12% of respondents had contacted their water company to make an enquiry in the past 12 months. Of these, almost a third had a billing enquiry (31%) and over two thirds were satisfied overall with their contact (69%).

Those who had made contact were satisfied with most aspects of the contact they were asked about, with at least 7 in 10 stating satisfaction on a whole range of attributes. The highest satisfaction is with the politeness and courtesy of staff (90%). The lowest satisfaction score (the only one to drop below 7 in 10 respondents satisfied) was for the water company keeping the customer up to date on progress with their enquiry, with 59% saying they were satisfied with this.

5% of all respondents had made a complaint in the last 12 months. Satisfaction with various aspects of the complaints process is low, with 41% being satisfied with the action taken as a result and how well the company dealt with their concern, and 46% satisfied with the speed of response to their complaint. Just over 4 in 10 respondents were satisfied overall with the way in which their complaint was handled (42%). Improvements would be to deal more quickly with the complaint and solve the issue behind the complaint.

Water on tap

92% are satisfied overall with aspects of their water supply. A high number of respondents (at least 8 in 10) were satisfied with various aspects of their water supply such as water pressure, colour and appearance of tap water and reliability of their water supply. The only factor with less than 8 in 10 being satisfied was hardness/softness of water (68%).

The most common suggestion for improving the overall service provided by the customers' water company is to reduce prices. Customers in the South West regions were most likely to state this as an improvement. The second most common suggestion for improvement was the quality of water. Customers in Eastern, Thames and Wessex regions were most likely to state this improvement.

The vast majority of customers feel that the service they have received from their water company in the last 12 months has stayed the same (90%). Respondents in the South West region were more likely to say that the service received had got better/much better.

A high number of respondents say they recognise the need to minimise wasteful use of water (95%) and take action to minimise this (94%). 7 in 10 drink tap water and recognise it is good for their health.

57% of respondents were aware of campaigns for using water wisely in the home or garden but almost a third were unaware (32%). Those in the Southern region were more likely to be aware of campaigns.

Of those who were aware of campaigns, over three quarters of respondents were made aware via TV (77%), with the second highest scoring media being newspapers/magazines (49%). Those in Thames were more likely to be aware via radio and those in the South West via mail from their water company.

Flush and go

93% of respondents think it is acceptable to dispose of bleach down the toilet or sink, showing that there is considerable room for raising awareness that this should not be done.

The second and third highest items respondents believed, incorrectly, that they could dispose of down the toilet were tampons (21%) and condoms (11%). Reassuringly other items asked about which can't be disposed in this way had 7% or less respondents saying they could be.

There is a high level of awareness of what happens to waste water that goes down the toilet or sink, with 92% stating correctly that it is cleaned at a treatment site.

Overall satisfaction with sewerage services is 88%, with those in the Midlands region more likely to be satisfied. There is a high level of satisfaction too with the customers' sewerage company management of reducing smells from sewerage works (71%), maintenance of sewerage pipes and treatment works (78%), minimisation of sewer flooding (78%) and waste water being cleaned properly (85%).

When respondents were asked what would most improve their sewerage service, most commonly reduction in prices (7%), clean sewer pipes and reduction of smells (both 5%) were mentioned.

Speaking up for water consumers

Over three quarters of respondents would contact their water or sewerage company if they had a problem with their water or sewerage services (76%), with only 1% of respondents saying they would contact a consumer body or CCWater.

One third of respondents had heard of CCWater (32%) and awareness was highest among those in the South West region. Of those who are aware, over half said they did not know anything about CCWater when prompted (56%). Those who did give an answer most commonly said that CCWater was a consumer or regulatory body (18% and 10%).

Despite a fairly low level of awareness, the vast majority do feel it's important there is a consumer body representing their interests about the water and sewerage service they receive (93%).

By far the most preferred method of contact with CCWater is telephone (75%), with the next preferred option of email being stated by only 9% of respondents. Only 3 respondents who were aware of CCWater had made contact in the past year.

Those who were aware of and knew something about CCWater were positive that they knew how to contact CCWater (69%) and that CCWater is effective in representing their views (60%). Just under half had seen references to CCWater or CCWater press notices (49%).

Respondents were asked, unprompted, how they would like to get information relating to water and sewerage services. 17% of respondents would prefer a leaflet or insert with their bill and 16% would prefer to use the internet to get information (but only 2% explicitly stated they would use CCWater's website). Those in the South West were more likely than others to say they would like to get information via consumer organisation mailings.

Recommendations

There are a number of recommendations that arise from the findings of the survey:

- *Since overall public awareness of CCWater is low (32%), CCWater should seek to publicise and more effectively communicate its role. It should also seek to improve awareness of various initiatives available, namely the Vulnerable Groups tariff (12% aware) and the services available for elderly and/or disabled customers (28% aware). They should also seek to publicise the compensation entitlement for residents if their water company does not meet its service delivery standards (39% aware).*
- *CCWater should seek to improve public awareness of what is disposable down toilets and sinks. This is particularly important for disposal of bleach; over 9 in 10 respondents thought it was acceptable to dispose of it in this way (93%).*
- *CCWater should work with water and sewerage companies to improve perceived fairness of the charges imposed (57% agreed they were fair). Improved perceived fairness could come through reduced charges, improved communication, highlighting the service that the customer receives, and/or improved levels of service.*
- *CCWater should work in particular with water companies in the South West and Thames regions to improve levels of customer satisfaction.*
- *CCWater should work with water companies in how customer complaints are dealt with and resolved. To improve the satisfaction with the speed of the complaints service (46% satisfied), it will be important to not only improve the speed of it but also the communication of the timescale. If the customer is aware of what will happen they will be less likely to place unrealistic expectations on the speed with which it is resolved.*

2 Background and Methodology

2.1 Background

The Consumer Council for Water (CCWater) is a public funded body whose purpose is to represent customers of water and sewerage companies in order to improve standards and value for money. CCWater operates through nine regional committees in England and a committee in Wales, and came into operation on 1st October 2005. CCWater commissioned ORC International to conduct their first annual tracking survey that aims to identify customers' concerns about water and sewerage services as well as enabling the measurement of year on year changes to determine where CCWater has added value.

This report details the findings of the research and will provide:

- An understanding of how consumers rate the services and the value for money that they receive from their water company;
- An assessment of consumers' knowledge of their rights and responsibilities regarding service provision; and
- A measure of awareness of CCWater and perceptions of the impact that it has.

2.2 Methodology

A twenty minute telephone questionnaire was designed in conjunction between ORC International and CCWater focusing on the five key themes of:

- Value for money;
- Consumer rights and responsibilities (right first time);
- Water on tap;
- Flush and go; and
- Speaking up for water consumers.

The questionnaire has been designed to provide robust year on year tracking data, initially establishing a base position in the key priority areas. Questions were divided into a number of sections that align with the target areas; these sections dictate the chapter structure of this report.

Random samples of domestic addresses and mobile telephone numbers were purchased. In total 2,000 interviews were completed; 1,932 interviews were completed via landlines and 68 by mobile telephone. When the survey is repeated it is recommended that mobile telephone numbers are excluded as there was a very low incidence of interviews being accepted.

Interviews were conducted between the 13th November and 8th December 2006. The questionnaire was piloted prior to entering field to ensure that it was workable, that all pertinent

issues were covered and that the information would be as valid as possible. The final questionnaire is included in the appendices.

Quotas were placed in order to ensure that both a representative sample of the population were interviewed and that enough interviews were completed within the subdivisions of certain groups to enable robust comparisons to be made. The numbers of completed interviews are shown in the table in figure 2.1 along with sampling errors for an achieved score of 50% at the 95% confidence level.

The sampling error gives a measure of accuracy for the survey results. So, for example, 1,484 non metered customers were interviewed and the sampling error for this group is +/-2.5% at the 95% confidence level. This means that if 50% of this group stated that they were satisfied with something we can be 95% sure that between 47.5% and 52.5% of the entire population of non metered customers would be satisfied.

Figure 2.1 Achieved Interviews

	Sub groups	Achieved Interviews	Sampling error at 95% confidence level
Gender	Male	756	+/-3.6%
	Female	1244	+/-2.8%
Age Group	18-24	70	+/-11.7%
	25-34	276	+/-5.9%
	35-44	555	+/-4.2%
	45-60	735	+/-3.6%
	61-74	283	+/-5.8%
	75+	70	+/-11.7%
	Refused	11	+/-29.5%
Ethnicity	White	1761	+/-2.3%
	Other	239	+/-6.3%
SEG¹	A	63	+/-12.3%
	B	282	+/-5.8%
	C1	608	+/-4.0%
	C2	363	+/-5.1%
	D	123	+/-8.8%
	E	484	+/-4.5%
	Refused	77	+/-11.2%
Water meters	Metered customers	516	+/-4.3%
	Non metered customers	1484	+/-2.5%

¹ A – Very senior managerial positions (large organisations) and professional occupations,
 B – Senior managerial; business owners. Middle management in large organisations,
 C1 – Small employers; junior management and other non-manual occupations,
 C2 – Lower supervisory and unskilled workers,
 D – Semi skilled and unskilled workers,
 E – Casual workers; unemployed and otherwise not working.

	Sub groups	Achieved Interviews	Sampling error
Region/Country	Eastern	248	+/-6.2%
	Yorkshire	193	+/-7.1%
	Northumbria	120	+/-8.9%
	Midlands	304	+/-5.6%
	South West	102	+/-9.7%
	Southern	234	+/-6.4%
	Thames	320	+/-5.5%
	North West	232	+/-6.4%
	Wessex	97	+/-9.9%
	Wales	150	+/-8.0%
Overall	All customers	2000	+/-2.2%

All figures in this report are rounded to the nearest whole number. For all questions the results are presented based on total number of respondents eligible to answer the question. They do not exclude 'don't knows' and so, for some questions, the sum across response categories (e.g very satisfied to very dissatisfied) will add to less than 100%. The differential will be the percentage saying 'don't know'.

For those questions where there is a five point scale used, we have also presented an aggregate score i.e % satisfied or % agreeing. Note that the aggregate scores will always exclude don't knows from the bases. This is noted on the tables.

All results are reported at the overall level and broken down by 9 English regions and Wales (with some exceptions if base sizes are small). Any relevant and statistically significant differences at a region/country level, and between other sub groups, are specifically outlined in the text. Some differences may be significant but we've not highlighted them – this has been to help distil the number of differences for you. Please also note that sometimes there may be the same result in region X and region Y and yet one is statistically significant but the other is not. This is a result of base sizes.

Where possible benchmarks have also been provided in order to allow results to be viewed in a much wider context. The benchmarks deemed to be most appropriate are from our private sector benchmarking database which includes business to consumer organisations (B2C).

3 Profile of Respondents

3.1 Water company

Interviews were achieved with customers of nearly all the water companies across England and Wales. The spread however is not even and survey results will therefore be reported back at regional/country level rather than water company level. Figure 3.1 shows the number of interviews achieved with customers of each company and the proportion in relation to the total number of interviews completed.

Figure 3.1 Who is your water company? This may be a company which deals with your sewerage too.

Water and Sewerage Companies	No of respondents	%	Water only companies	No of respondents	%
Anglian Water Services Ltd	204	10%	Bournemouth & West Hampshire Water Plc	8	*%
Dŵr Cymru Welsh Water	146	7%	Bristol Water Plc	14	1%
Northumbrian Water Ltd	114	6%	Cambridge Water Company Plc	5	*%
Severn Trent Water Ltd	276	14%	Cholderton & District Water Company Ltd	0	0%
South West Water Ltd	102	5%	Dee Valley Water Plc	4	*%
Southern Water Services Ltd	166	8%	Essex & Suffolk Water	38	2%
Thames Water Utilities Ltd	256	13%	Folkestone & Dover Water Services Ltd	8	*%
United Utilities Water Plc (North West Water)	232	12%	Hartlepool Water Plc	6	*%
Wessex Water Services Ltd	75	4%	Mid Kent Water Plc	17	1%
Yorkshire Water Services Ltd	193	10%	Portsmouth Water Plc	18	1%
			South East Water Plc	25	1%
			South Staffordshire Water Plc	28	1%
			Sutton & East Surrey Water Plc	11	1%
			Tendring Hundred Water Services Ltd	1	*%
			Three Valleys Water Plc	53	3%

Note: *% means more than 0% but less than 0.5%

3.2 Sewerage Companies

Respondents who were customers of water only companies were additionally asked to state who their sewerage company was. The responses showed that there was a high proportion of respondents who did not know. The results are shown in the table in figure 3.2

Figure 3.2 Sewerage companies

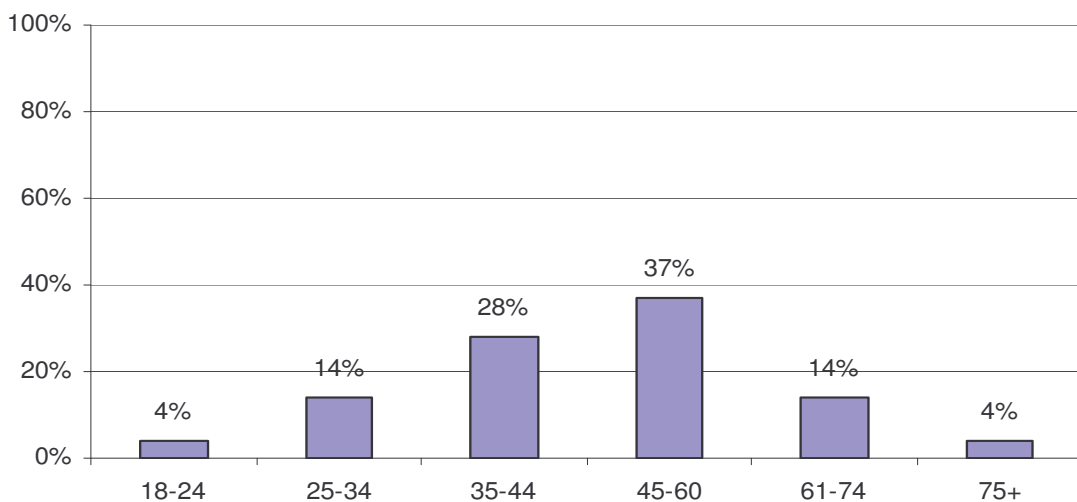
Water and Sewerage Companies	No of respondents	%
Anglian Water Services Ltd	12	5%
Dŵr Cymru Welsh Water	0	0%
Northumbrian Water Ltd	0	0%
Severn Trent Water Ltd	3	1%
South West Water Ltd	6	3%
Southern Water Services Ltd	28	12%
Thames Water Utilities Ltd	19	8%
United Utilities Water Plc (North West Water)	0	0%
Wessex Water Services Ltd	13	6%
Yorkshire Water Services Ltd	1	*%
Don't know	154	65%

Note: *% means more than 0% but less than 0.5%

3.3 Age

The age range of the sample was from 18 years – 75 years plus. A high proportion of respondents fell in the 45 - 60 age group (37%) and just over a quarter of respondents were from the 35 – 44 age group (28%). Figure 3.3 shows the spread of ages across the groups.

Figure 3.3. Age of respondents



Base: all respondents excluding those refusing to answer (1989)

21% of respondents in the 61-74 age group came from Wales, which is statistically higher compared with six regions: Eastern (13%), the Midlands (13%), Southern (13%), Thames (12%), North West (13%) and Yorkshire (12%).

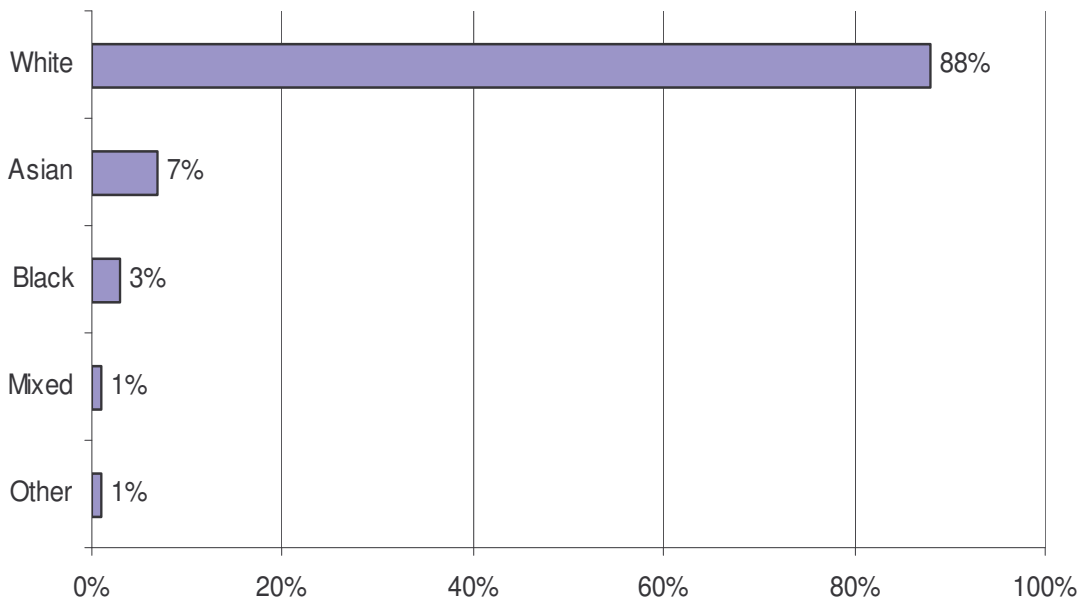
3.4 Ethnicity

88% of respondents were white, with 83% being white British. Figure 3.4 shows the results for ethnicity. Looking at the variation in the proportion of ethnic minorities:

- Highest proportion of Asian respondents in Thames, Midlands and Yorkshire (13%, 11% and 10% respectively). These are significantly higher proportions than the number of Asian respondents in Eastern, Northumbria, South West and Southern regions, and Wales (1-4%).
- Highest proportion of Black respondents in Thames region (11%). This is significantly higher than all other regions and Wales (0-4%).

Looking at differences in the age profile, the highest proportion of white respondents are aged 61-74 years or 75+ years (96% and 93% respectively). The proportion of white respondents aged 61-74 years is significantly higher than those in the four younger age categories (78-90%).

Figure 3.4 How would you describe your ethnic background?



Base: all respondents (2,000)

3.5 Occupation

Almost one half of respondents are classified as C1/C2² (48%) on the basis of the occupation of the main chief income earner in the household, and almost a quarter are in socio-economic group E (24%).

Some statistically significant differences included:

- Respondents of Eastern, Southern and Yorkshire regions (35%, 34% and 34% respectively) were significantly more likely to be classified as C1 compared to Northumbria (23%) and the Midlands (26%).
- 33% of respondents describing their main income earner as C1 live in an Urban area; this is statistically higher compared to 26% in the suburban/ semi rural area.

Figure 3.5 What is the occupation of the main income earner in your household?

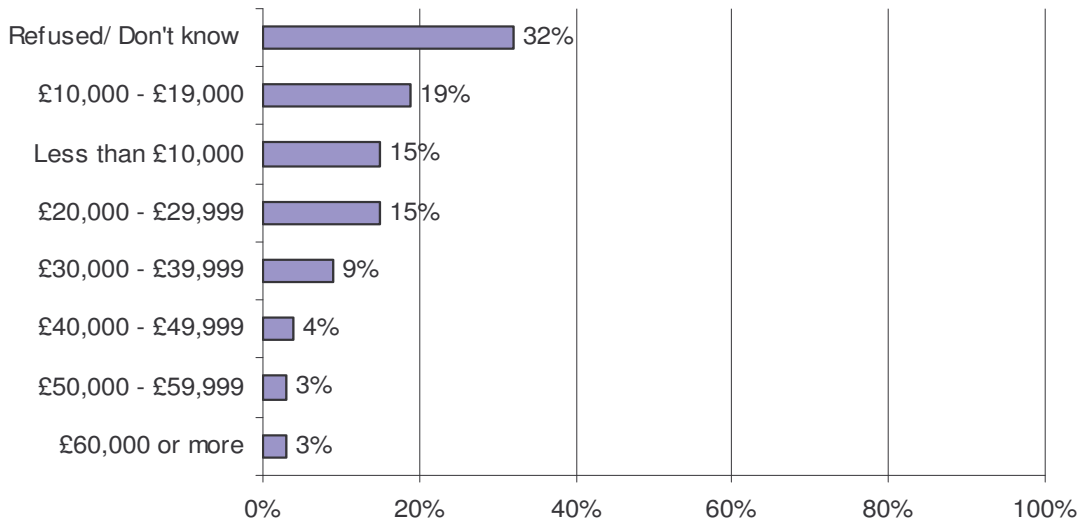
Occupation	Total
A – Very senior managerial positions (large organisations) and professional occupations	3%
B – Senior managerial, business owner, Middle management in large organisations	14%
C1 – Small employers, junior management and other non-manual occupations	30%
C2 – Lower supervisory and unskilled workers	18%
D – Semi skilled and unskilled workers	6%
E – Casual workers, unemployed and otherwise not working	24%

3.6 Annual Income

635 respondents refused or didn't know the total income of the household (32%). Figure 3.6 shows the spread of total annual income within the household.

² A – Very senior managerial positions (large organisations) and professional occupations
 B – Senior managerial, business owner, Middle management in large organisations
 C1 – Small employers, junior management and other non-manual occupations
 C2 – Lower supervisory and unskilled workers
 D – Semi skilled and unskilled workers
 E – Casual workers, unemployed and otherwise not working

Figure 3.6 Total annual income (before tax)



Base: All respondents (2,000)

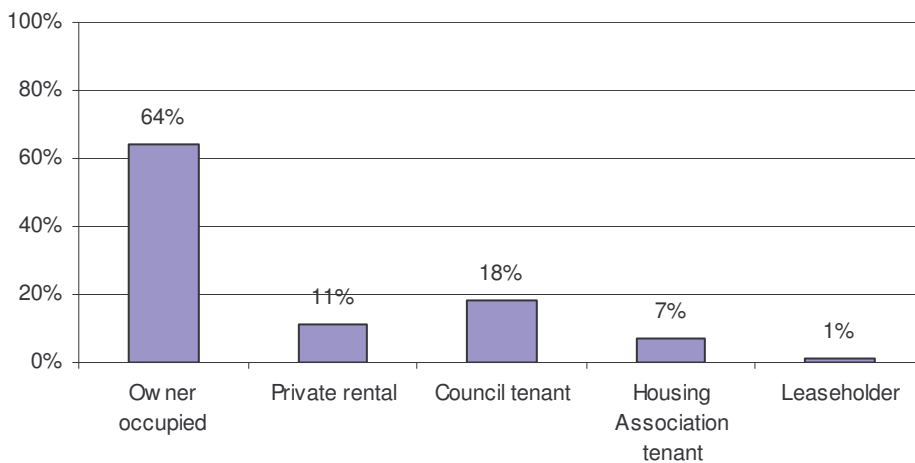
3.7 Accommodation

Almost two thirds of respondents live in owner occupied accommodation (64%). 18% are council tenants, 11% privately rent and 7% are housing association tenants. Figure 3.7 shows type of accommodation respondents live in.

Some statistically significant differences included:

- One in ten people in the Thames region are housing association tenants (11%), which is statistically higher compared to Eastern, Northumbria and the Midlands region (4%, 4% and 5% respectively).

Figure 3.7 What type of accommodation respondents live in

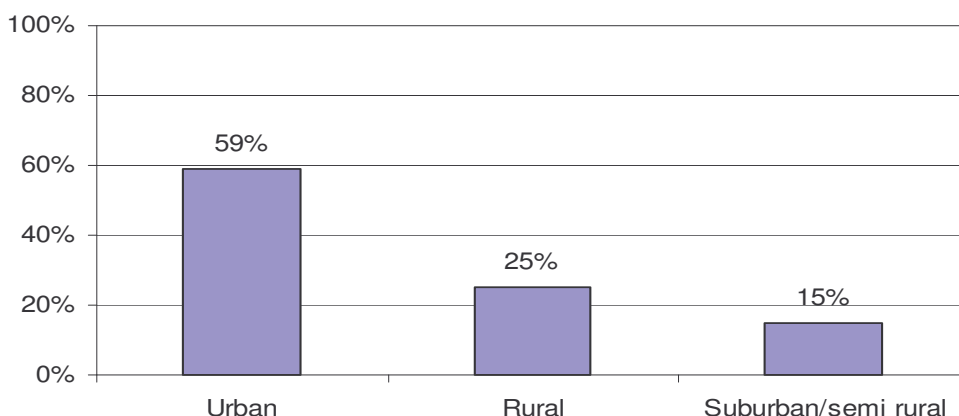


Base: all respondents excluding don't know/ refused (1,977)

3.8 Urban or rural area

Figure 3.8 shows the area respondents live in. The majority of respondents live in an urban area (59%) with a quarter of respondents living in a rural area and 15% living in a suburban/ semi rural area.

Figure 3.8 Type of area lived in



Base: all respondents excluding 'don't know' (1,938)

3.9 Water Meter

Almost three quarters of respondents do not have a water meter (74%). Figure 3.9 shows a break down by regions and Wales.

Some statistically significant differences included:

- Half of respondents from the Eastern region (50%) and just over half in the South West region (52%) have water meters. This is statistically higher compared to Northumbria, the Midlands, Southern, Thames, North West regions and Wales (14-30%).

Figure 3.9 Does your household have a water meter?

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Yes	50%	14%	21%	52%	21%	21%	15%	29%	25%	30%
No	50%	86%	79%	48%	79%	79%	85%	71%	75%	80%

4 Value for money

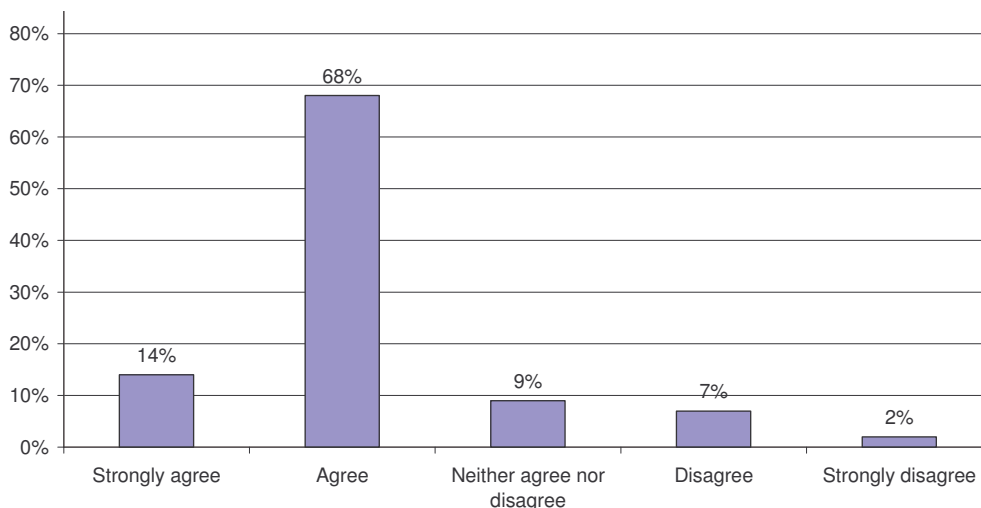
Key findings:

- 82% of people say their bill for water and sewerage services is clear and understandable. Those in the Thames region were least likely to agree their bill was clear.
- 69% of people were satisfied that they receive value for money from their water services. Dissatisfaction with value for money is highest in the South West region. The most commonly stated reason for respondents saying they're not satisfied with value for money is that the services are 'too expensive'.
- 78% of people were satisfied that they receive value for money from their sewerage services. Dissatisfaction with value for money is highest in the South West and Eastern regions. Again the most commonly stated reason for respondents saying they're not satisfied with value for money is that the services are 'too expensive'.
- 57% agreed that the water and sewerage charges they pay are fair. Those in the South West were most likely to disagree that charges were fair in comparison to those in other regions and Wales.
- 63% agreed that the water and sewerage charges they pay are affordable. Those in Northumbria were most likely to agree that charges were affordable.

4.1 Clarity of the bill

Overall results show that the majority of people do feel that their bill is clear and understandable; 82% agreed/strongly agreed and just 9% disagreed/strongly disagreed. The chart in figure 4.1 displays the more detailed overall results and the results are also split by region.

Figure 4.1 How far do you agree or disagree that the bill you receive for water and sewerage services is clear and understandable?



Base: All respondents excluding those answering don't know (1,864)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Strongly agree	17%	13%	13%	20%	14%	13%	12%	12%	15%	13%
Agree	65%	74%	71%	58%	68%	65%	71%	77%	67%	65%
Neither agree nor disagree	6%	9%	10%	13%	7%	10%	9%	4%	8%	11%
Disagree	8%	5%	5%	7%	8%	9%	6%	4%	8%	8%
Strongly disagree	3%	0%	1%	2%	3%	3%	1%	3%	2%	3%
Total Agreed, exc. DK	82%	87%	85%	78%	82%	77%	84%	88%	82%	78%
Total Disagreed, exc. DK	11%	5%	6%	9%	11%	13%	7%	7%	10%	11%
Base	235	104	286	96	224	286	217	94	181	142

Analysis of the results shows that the proportion who agreed (agree/strongly agree) that the bill they receive for their water and sewerage services was clear and understandable were significantly lower in the Thames region when compared with the highest results from Northumbria, the Midlands and Wessex.

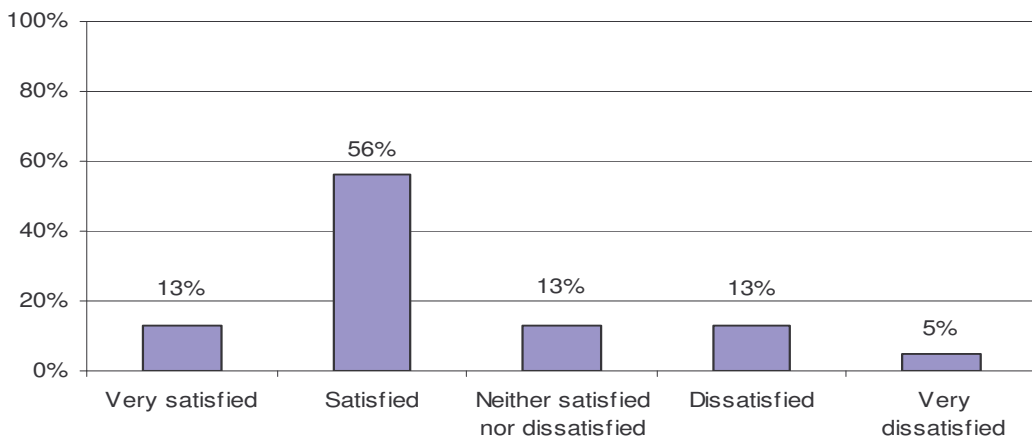
Other differences between sub groups included:

- Older respondents aged 61-74 years and 75+ years were significantly more likely to agree/strongly agree that their bills are clear and understandable when compared with the 25-34 age group (86% and 91% respectively vs 78%).
- White respondents were significantly more likely to agree/strongly agree their bills were clear and understandable compared with respondents from other ethnic backgrounds (83% vs 75%).

4.2 Value for money – water services

Two thirds of people were satisfied/very satisfied with the value for money water services offered in their area (69%) and just under one in five were dissatisfied/very dissatisfied (18%). Figure 4.2 shows a more detailed analysis of the results.

Figure 4.2 How satisfied or dissatisfied are you with the value for money from the water services in your area?



Base: all respondents excluding those answering don't know (1,956)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Very satisfied	15%	17%	11%	14%	11%	10%	16%	14%	14%	10%
Satisfied	56%	63%	63%	35%	53%	55%	58%	57%	58%	55%
Neither satisfied nor dissatisfied	13%	8%	12%	11%	14%	15%	14%	9%	15%	12%
Dissatisfied	10%	10%	10%	23%	16%	13%	9%	16%	11%	17%
Very dissatisfied	5%	2%	3%	16%	6%	6%	3%	3%	2%	5%
Total Satisfied, exc. DK	72%	80%	74%	49%	64%	65%	75%	71%	72%	66%
Total Dissatisfied, exc. DK	15%	14%	14%	39%	22%	19%	11%	20%	13%	23%
Base	239	119	299	99	229	310	228	97	191	146

Analysis of the results shows that dissatisfaction (dissatisfied/very dissatisfied) was significantly higher in the South West region with value for money offered from their local water services when compared with the lowest results from: Eastern, Northumbria, the Midlands, Southern, Thames regions and Wales.

Other differences between sub-groups included:

- Respondents aged 75+ years were more satisfied/very satisfied with the value for money offered from their local water services when compared to those aged 25-34, 35-44 and 45-60 years (86% vs 67%, 68%, 68% respectively).

Respondents were asked to give a reason if they were not satisfied with the value for money from their local water services. They following were the most commonly cited reasons from respondents' free-text answers:

- 36% saying it was too expensive.
- 7% citing water quality i.e. too cloudy/ unclean.

Differences include:

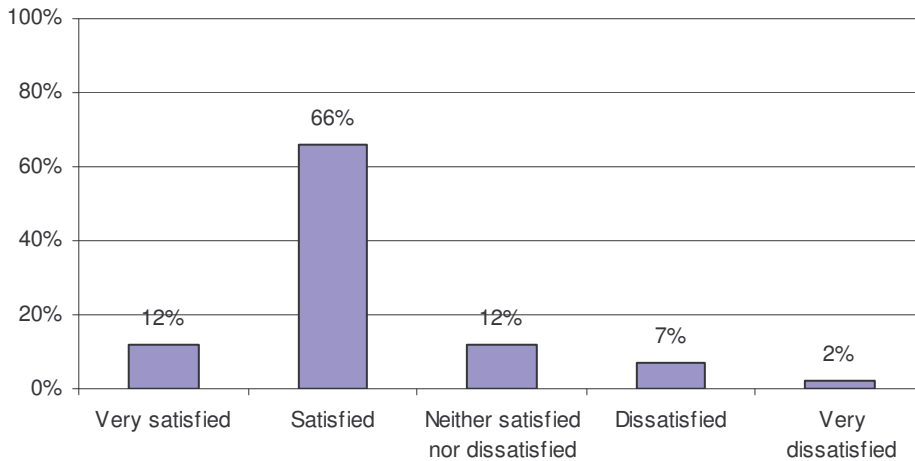
- 12% of respondents in the Midlands gave the reason for lack of value for money was slowness to do repairs, which is statistically higher when compared to the lowest results from South West, Southern, Thames, Yorkshire regions and Wales (0-4%).
- 18% of respondents in the South West said certain parts of the country are cheaper than others. This was significantly higher than the proportions stating this reason in Eastern, Midlands, Southern, Thames, North West and Yorkshire regions (0-4%).

The general consensus across all the regions and Wales for the reason why respondents were not satisfied with the value for money from their local water service was because it was too expensive (ranging from 26-49%). The exception was respondents in Northumbria, with only 8% citing this as their main reason for not being satisfied with the value for money from their local water services.

4.3 Value for money – sewerage services

78% of respondents were satisfied/very satisfied with the value for money from the sewerage services in their area; whilst 9% were dissatisfied/very dissatisfied. Figure 4.3 displays the detailed results.

Figure 4.3 How satisfied or dissatisfied are you with the value for money from the sewerage services in your area?



Base: all respondents excluding those answering don't know (1,839)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Very satisfied	11%	17%	10%	16%	11%	10%	13%	13%	11%	12%
Satisfied	66%	69%	69%	53%	64%	68%	64%	60%	71%	71%
Neither satisfied nor dissatisfied	11%	9%	12%	18%	13%	11%	16%	15%	11%	9%
Dissatisfied	10%	4%	8%	7%	8%	8%	6%	9%	6%	6%
Very dissatisfied	2%	1%	2%	6%	4%	3%	1%	2%	1%	2%
Total Satisfied, exc. DK	77%	86%	79%	69%	74%	77%	77%	74%	82%	83%
Total Dissatisfied, exc. DK	12%	5%	10%	14%	12%	11%	7%	11%	7%	8%
Base	226	112	285	96	223	273	216	91	180	138

Analysis shows the highest level of satisfaction (satisfied/very satisfied) with value for sewerage services is in Northumbria and Wales (86% and 83% respectively). Both of these satisfaction scores are significantly higher than levels of satisfaction noted by respondents in South West and Southern (69% and 74% respectively). The highest levels of dissatisfaction (dissatisfied/very dissatisfied) is among respondents in South West and Eastern regions (14% and 12% respectively), which are both significantly higher than dissatisfaction levels in Northumbria (5%).

Other differences between sub groups included:

- South West Water Ltd and Southern Water Services Ltd both had 6% of customers who were *very dissatisfied* with their sewerage service value for money. This is significantly more than those customers of five other water companies – Anglian Water Services (1%), Northumbrian Water Ltd (1%), United Utilities (1%) and Severn Trent Water Ltd (2%).
- Respondents aged 61-74 years were more likely to say they were satisfied/very satisfied with the value for money from their sewerage services compared to the 18-24, 25-34 and 35-44 age groups (84% vs 73%, 70% and 77% respectively).

Respondents were asked to give a reason if they were not satisfied with the value for money from their sewerage services:

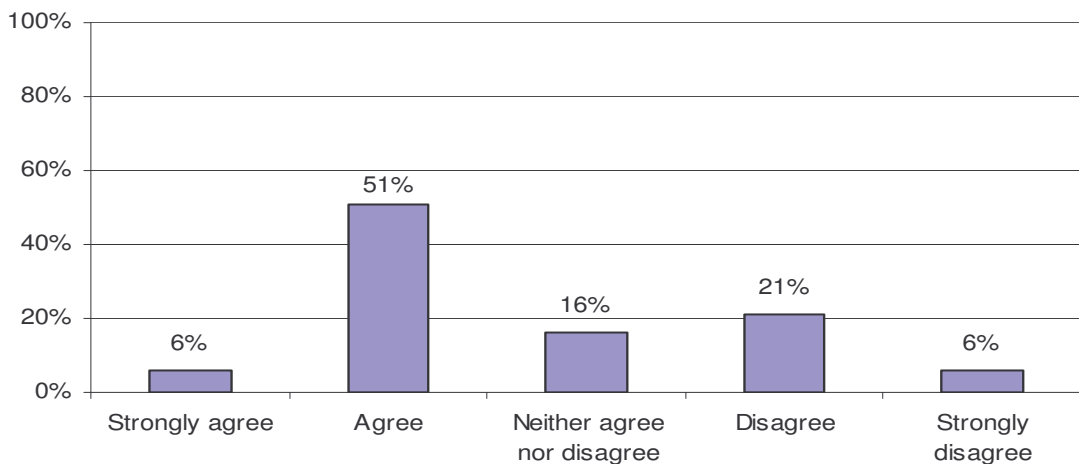
- 26% of respondents gave the reason it was too expensive.
- 10% of respondents said because they have problems with their drains.

A significantly higher proportion of respondents in the Eastern region (40%) gave the reason it was too expensive, when compared to the lowest results from Thames and North West regions (18% and 14% respectively).

4.4 Water and sewerage charges

57% of respondents agreed/strongly agreed and 27% disagreed/strongly disagreed that their water and sewerage charges are fair. Figure 4.4 displays a detailed analysis of the results.

Figure 4.4 How much do you agree or disagree that the water and sewerage charges that you pay are fair?



Base: all respondents excluding those answering don't know (1,902)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Strongly agree	7%	5%	5%	6%	6%	4%	6%	7%	8%	4%
Agree	46%	65%	54%	25%	44%	46%	50%	46%	53%	45%
Neither agree nor disagree	16%	13%	13%	13%	19%	18%	16%	12%	16%	15%
Disagree	22%	9%	19%	35%	21%	16%	20%	18%	15%	28%
Strongly disagree	5%	2%	5%	18%	6%	6%	5%	10%	4%	5%
Total Agreed, exc. DK	55%	75%	62%	32%	52%	55%	58%	57%	64%	51%
Total Disagreed, exc. DK	28%	12%	24%	55%	28%	25%	26%	30%	19%	34%
Base	239	112	292	99	225	289	226	92	183	146

Analysis shows that:

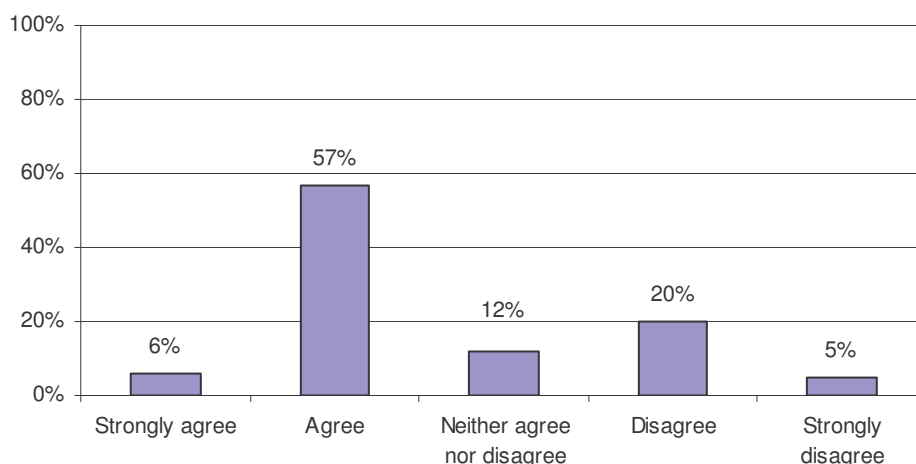
- Respondents in Northumbria are significantly more likely to agree that water and sewerage charges are fair (75%) compared with all other regions and Wales (32% to 64%). That said, those in Yorkshire and Midlands are significantly more likely to agree (64% and 62%) compared with Wales, and the South West and Southern regions (51%, 32% and 52% respectively).
- Comparatively, those in the South West are significantly more likely to disagree that water and sewerage charges are fair (55%) compared with all other regions and Wales (12% to 34%). Furthermore, those in Eastern (28%), Southern (28%) and Wessex (30%) regions, and Wales (34%), are significantly more likely to disagree compared with those in Northumbria (12%) and Yorkshire (19%).

Other differences between sub groups included:

- 61% of respondents aged 18-24 years agreed/strongly agreed that water and sewerage charges are fair when compared to those aged 25-34, 35-44 and 45-60 years (47%, 48%, 46% respectively).

Respondents were also asked the extent to which they agreed or disagreed that water and sewerage charges paid are affordable. Over 6 in 10 respondents agreed they were affordable (63%), though only 6% strongly agreed. A quarter of respondents disagreed (disagree/strongly disagree) that the prices are affordable.

Figure 4.5 How much do you agree or disagree that the water and sewerage charges that you pay are affordable?



Base: all respondents excluding those answering don't know (1,941)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Strongly agree	7%	7%	7%	6%	5%	4%	7%	9%	8%	7%
Agree	55%	73%	57%	40%	60%	59%	57%	53%	56%	49%
Neither agree nor disagree	12%	8%	12%	12%	10%	13%	14%	13%	15%	9%
Disagree	21%	10%	19%	28%	22%	18%	19%	17%	19%	31%
Strongly disagree	5%	2%	4%	14%	2%	7%	4%	9%	1%	5%
Total Agreed, exc. DK	62%	80%	65%	46%	65%	63%	64%	62%	64%	56%
Total Disagreed, exc. DK	26%	12%	23%	42%	24%	25%	22%	26%	21%	35%
Base	241	115	298	100	231	304	227	94	185	147

Analysis shows that:

- 80% of respondents from Northumbria agreed/strongly agreed that the water and sewerage charges are affordable, which is significantly higher compared to all other regions and Wales (46% to 65%). Furthermore, respondents from Eastern (62%), Midlands (65%), Southern (65%), Thames (63%), North West (64%), Wessex (62%) and Yorkshire (64%) are significantly more likely to agree than respondents from South West (46%).
- Comparatively, looking at the percentage of respondents disagreeing, those in the South West were more likely to disagree (42%) than many of the other regions – namely Eastern (26%), Northumbria (12%), Midlands (23%), Southern (24%), Thames (25%), North West (22%), Wessex (26%) and Yorkshire (21%). In addition, Wales has significantly higher levels of disagreement (35%) compared with Northumbria (12%), Midlands (23%), Southern (24%), Thames (25%), North West (22%) and Yorkshire (21%).

5 Consumer Rights and Responsibilities

Key findings:

- There is a high level of awareness that bills could be paid by direct debit and in instalments (93% and 91%), and awareness that customers could talk to their water company if they had problems paying (81%). Awareness of these options was lowest in the Thames region.
- 50% of unmetered customers knew they could have a water meter fitted free of charge and 20% knew that if they had their water meter fitted they had 12 months to decide whether they were happy with it and could revert back to unmeasured charges. Unmetered respondents in the South West tended to be more aware than in other regions and Wales.
- 12% were aware of the vulnerable groups' tariff, with 1% subscribing. The highest levels of awareness are in Eastern and South West regions. 28% were aware of the services for elderly and/ or disabled customers, with 2% subscribing. The highest level of awareness was in the Eastern region.
- 60% of respondents (excluding council tenants) correctly identified themselves/ their landlord as being responsible for maintaining water and sewerage pipes at their property; with those in the South West more likely to be correct with regards to water pipe maintenance and those in Wessex more likely to be correct with regards to sewerage pipe maintenance.
- There was a lower level of correct identification of responsibility among council tenants. 45% of council tenants correctly identified their local council as responsible for water pipe maintenance and 50% correctly identified their local council as responsible for sewerage pipe maintenance. Those in Eastern and Midlands regions were most likely to correctly identify their local council's responsibility for water pipe maintenance and those in the Midlands were also most likely to correctly identify their local council's responsibility for sewerage pipe maintenance.
- 39% of respondents were aware that if their water company failed to meet its service delivery standards they were entitled to compensation. Awareness of compensation was lowest in the Thames region.
- Just 12% of respondents had contacted their water company to make an enquiry in the past 12 months. Of these, almost a third had a billing enquiry (31%) and over two thirds were satisfied overall with their contact (69%).
- Those who had made contact were satisfied with most aspects of the contact they were asked about, with at least 7 in 10 stating satisfaction on a whole range of attributes. The highest satisfaction is with the politeness and courtesy of staff (90%). The lowest satisfaction score (the only one to drop below 7 in 10 respondents satisfied) was for the water company keeping the customer up to date on progress with their enquiry, with 59% saying they were satisfied with this.

- 5% of all respondents had made a complaint in the last 12 months. Satisfaction with various aspects of the complaints process is low, with 41% being satisfied with the action taken as a result and how well the company dealt with their concern, and 46% satisfied with the speed of response to their complaint. Just over 4 in 10 respondents were satisfied overall with the way in which their complaint was handled (42%). Improvements would be to deal more quickly with the complaint and solve the issue behind the complaint.

5.1 Awareness of billing options

Respondents were asked a set of questions to determine their awareness of the different ways that they could pay their bills. The overall results showed that awareness in all areas tested was high:

- 93% indicated that they knew that they could pay their water and sewerage bill by direct debit;
- 91% of respondents stated that they were aware that they could pay their water and sewerage bill in instalments; and
- 81% were aware that they could talk to their water company if they were having problems paying their bill.

Figure 5.1 shows a breakdown of the results; there were some differences between the figures stating that they were aware in each case. In terms of knowledge that consumers can pay in instalments, the proportion aware in the Thames region was significantly lower than that in the Eastern and Southern regions, and Wales.

Awareness in the Thames region was also significantly lower for paying bills by direct debit when compared with the Eastern, Midlands, Southern and North West; and for knowledge that you can talk to your water company if you are having trouble paying bills when compared with the Eastern, Midlands, South West, Southern and Yorkshire areas.

Figure 5.1 Analysis of awareness of billing options

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Aware of paying in instalments	93%	90%	91%	91%	92%	86%	91%	92%	90%	94%
Aware of paying by Direct Debit	96%	92%	95%	94%	95%	88%	94%	92%	93%	93%
Aware they can talk to their water company if they were having problems paying a bill	85%	74%	83%	88%	83%	74%	78%	82%	81%	81%
Base	248	120	304	102	234	320	232	98	193	150

Additional analysis showed:

- Respondents in the 18-24 age group were significantly less likely to be aware that they could pay their bill in instalments (79%) when compared with respondents aged 25-74 (90% or over in each age group);

- Respondents aged 75+ were significantly less likely to be aware that they can talk to their water company if they are having problems paying a bill (61%) when compared with all other age groups (between 78% and 83%).

5.2 Awareness surrounding water meters

All unmetered respondents (1,484 people) were asked about water meters:

- Only 50% of respondents overall were aware that they could have a water meter fitted free of charge; and
- Just 20% of respondents were aware that if they had a water meter fitted, they had 12 months to decide whether or not they were happy with it and could revert back to the original water rate at no extra charge.

With one or two exceptions, analysis showed that respondents in the South West region were significantly more likely to be aware of the logistics surrounding fitting and trialling water meters than respondents in other regions and Wales.

Figure 5.2 Awareness of the logistics of fitting and trialling water meters

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Aware you can have a water meter fitted free of charge	62%	40%	48%	69%	51%	47%	48%	49%	49%	53%
Aware of water meter trialling at no extra cost	24%	16%	18%	41%	16%	15%	27%	23%	20%	22%
Base	124	103	240	49	185	252	197	70	144	120

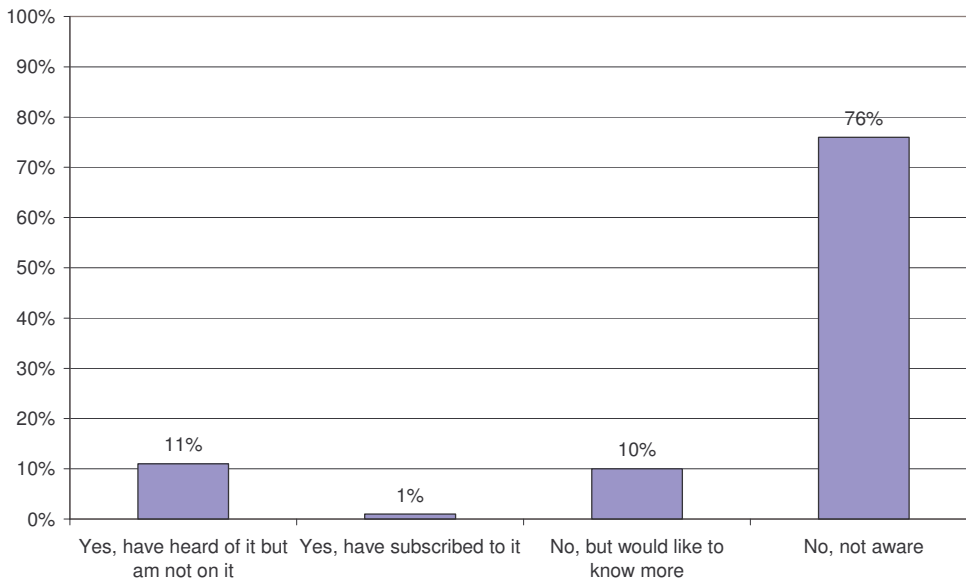
Further analysis highlighted the following difference between sub groups:

- Respondents aged between 35 - 74 years were significantly more likely than younger respondents aged 18 – 24 years to be aware that they could have a water meter fitted free of charge (50-53% vs 33%).

5.3 Awareness of the Vulnerable Groups tariff

All respondents were asked whether they were aware of or were on the Vulnerable Groups tariff. It was explained that this tariff was introduced to help people in low income groups who need to use a lot of water. Overall just 12% of respondents indicated that they were aware and 86% stated that they were not aware. Very low proportions of respondents stated that they had subscribed to the scheme – just 1% (26 people) overall. The full results are shown in figure 5.3.

Figure 5.3 Are you aware of or are you currently on the Vulnerable Groups tariff?



Base: all respondents (2,000)

Figure 5.4 Awareness of the Vulnerable Groups' tariff

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Yes, have heard of it but am not on it	16%	10%	9%	17%	9%	9%	12%	8%	12%	9%
Yes, have subscribed to it	2%	0%	1%	2%	1%	1%	1%	1%	3%	1%
No, but would like to know more	8%	6%	11%	9%	7%	13%	11%	11%	10%	7%
No, not aware	72%	81%	78%	72%	80%	75%	75%	78%	74%	82%
Base	248	120	304	102	234	320	232	98	193	150

Analysis shows that those in Eastern and South West regions (16% and 17% respectively) are significantly more likely to say they have heard of the tariff (but not subscribe) than those living in Midlands, Southern and Thames regions (all 9%).

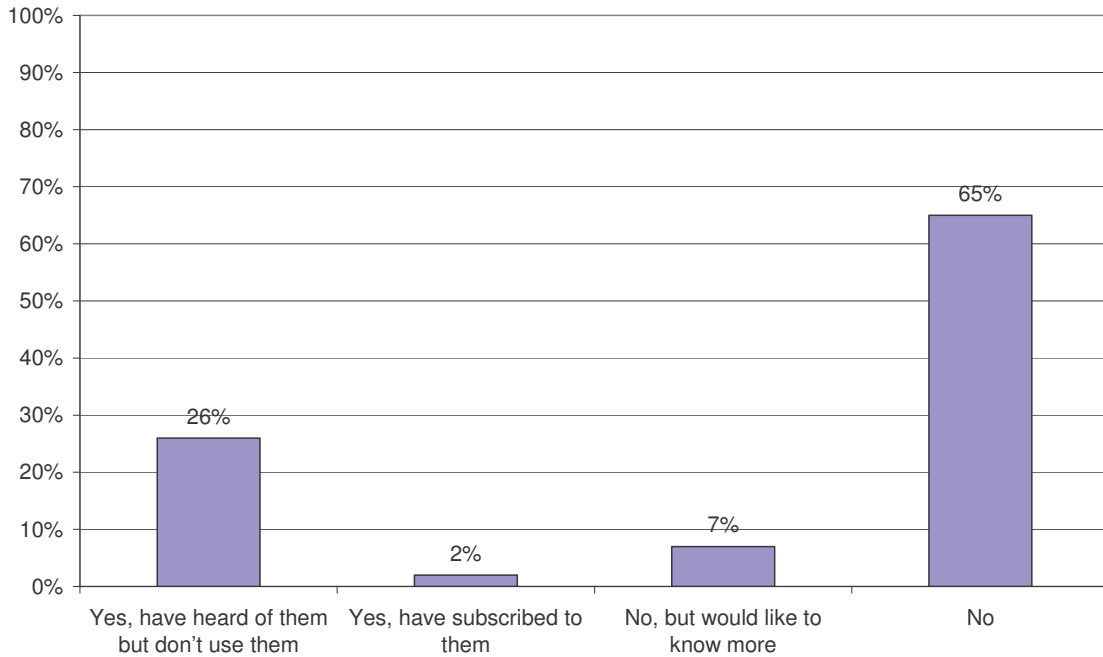
Analysis by the different sub groups highlighted the following differences:

- Respondents in the younger age group 18–24 years were less likely to be aware of the Vulnerable Groups' tariff than those aged 45–74 years (87% of younger respondents said 'no, not aware' vs 71%-75% of those aged 45–74 years).
- Metered respondents were more likely to have heard of the tariff (14%) when compared with non-metered (10%) but the difference in those subscribing to it was not significant (2% of metered respondents and 1% of non metered respondents).
- Respondents in rural areas were significantly more likely to have heard of the scheme (13%) when compared with respondents in urban areas (10%), but again the difference in those subscribing to it was not significant (2% in rural areas and 1% in urban areas).

5.4 Services for elderly and/or disabled customers

Awareness of services for elderly or disabled customers, for example services for sight impaired people or passwords to ensure callers from the company are genuine, was higher than awareness of the vulnerable groups tariff. Overall, 28% of people stated they were aware of the services (2% having subscribed to them) and 72% stated that they were not aware. The full results are shown in figure 5.4.

Figure 5.5 Are you aware of your company's services for elderly and/or disabled customers?



Base: all respondents (2,000)

Analysis showed awareness to be highest in the Eastern region; the proportion who stated that they had heard of the services but did not use them (32%) was significantly higher than that in the Northumbria and Thames regions, and Wales (21-23%).

Figure 5.6 Awareness of services for elderly and/or disabled customers

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Yes, have heard of them but don't use them	32%	22%	25%	30%	24%	23%	28%	29%	25%	21%
Yes, have subscribed to them	2%	0%	1%	2%	1%	1%	3%	1%	3%	1%
No, but would like to know more	5%	8%	8%	9%	5%	7%	8%	6%	8%	7%
No, not aware	60%	69%	65%	59%	71%	69%	61%	63%	64%	71%
Base	248	120	304	102	234	320	232	98	193	150

Additional analysis showed:

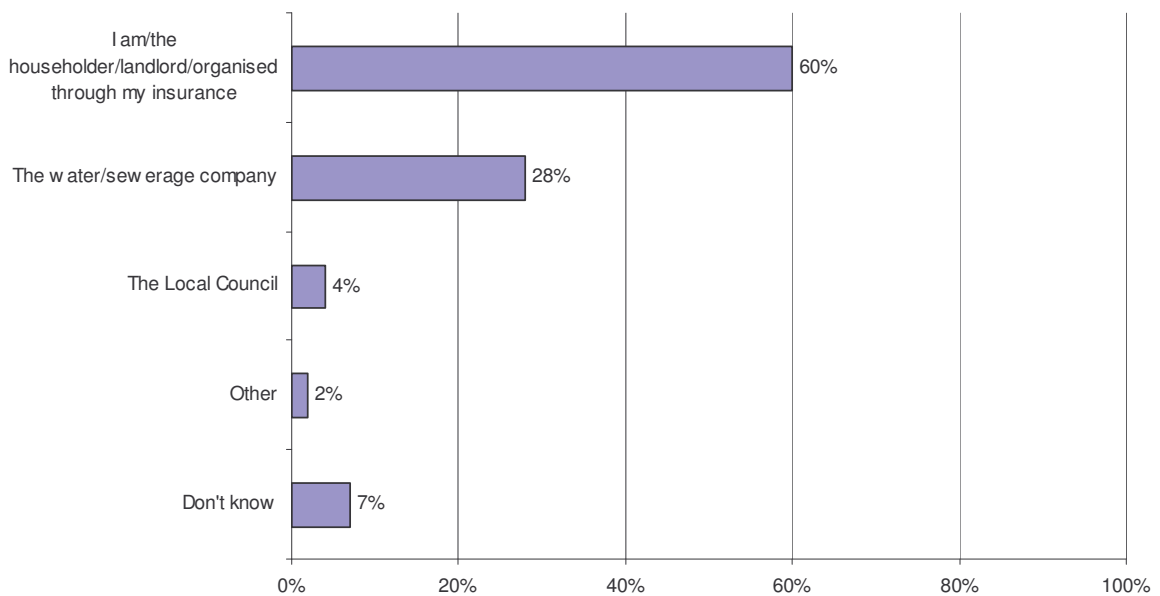
- Respondents aged 75+ years were, encouragingly, significantly more likely to be aware of the services when compared with younger age groups 25 – 44 years (36% vs 22-23%). There was also a significantly higher proportion of those aged between 61 and 75+ years stating they were not aware of the services but would like to know more (13-14% vs 0-6% from other age categories).
- Metered customers were significantly more likely to be aware of the services but not use them (31%) when compared with non-metered customers (24%). There was no significant difference in subscription to the service (2% metered vs 1% non-metered).
- White respondents were also significantly more likely to have heard of the services but not use them (27%) when compared with respondents from other ethnic backgrounds (20%). As with metered/ non-metered respondents, there is no significant differences in usage though (2% white vs 1% other ethnicity).

5.5 Maintenance of water pipes

All respondents were asked who they thought was responsible for maintaining the water pipes at their property. The correct answer varies in accordance to whether the respondent is a council tenant or not. For council tenants it’s the council who is responsible for maintaining the water pipes at their property. For all others, the owner, occupier or their private landlord is responsible. To ascertain whether respondents answered this question correctly, the charts below for this question are based on a) all respondents except council tenants and then b) all council tenants.

The overall results for all respondents except council tenants are shown in figure 5.7

Figure 5.7: Who do you think is responsible for maintaining the water pipes at your property?



Base: All respondents except council tenants (1,652)

6 in 10 respondents (60%) correctly identified that they are responsible for maintaining the water pipes up to the boundary of their property. Incorrectly, just over a quarter (28%) of respondents thought it was the water/sewerage responsibility and 4% thought it was the local council's responsibility.

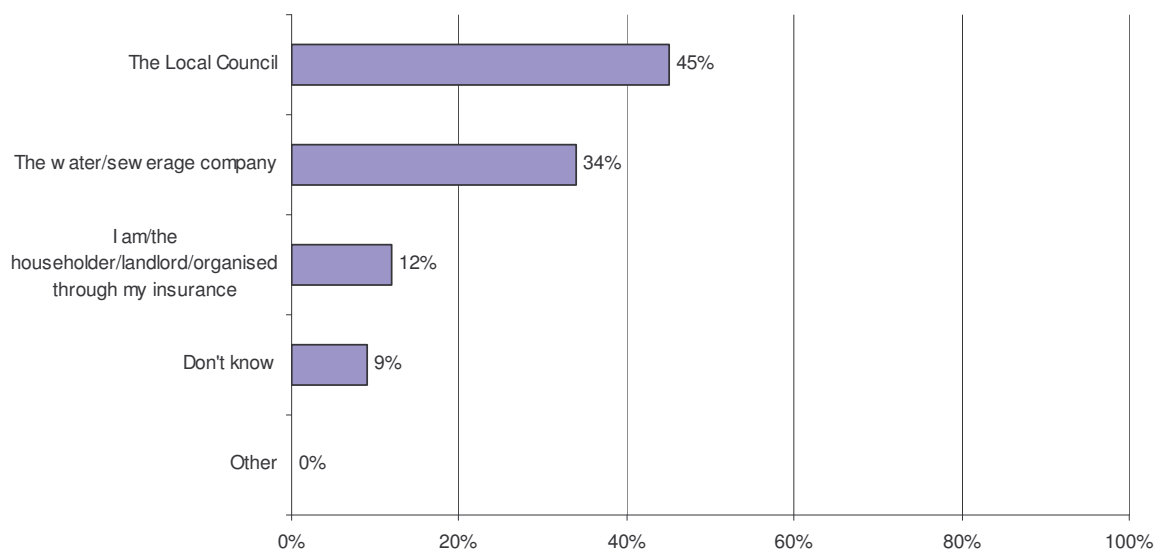
Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
I am/the householder/landlord/organised through my insurance	62%	60%	57%	75%	62%	56%	63%	62%	55%	56%
The Local Council	4%	6%	2%	0%	4%	7%	5%	1%	3%	2%
The water company	27%	24%	32%	22%	28%	24%	25%	27%	33%	34%
Other	1%	5%	1%	0%	1%	5%	2%	2%	1%	1%
Don't know	6%	5%	7%	4%	6%	8%	5%	7%	9%	6%
Base	211	103	245	83	195	252	197	84	159	124

Analysis shows that between 54% - 75% of respondents across the regions and Wales correctly identified that they or their landlord are responsible for maintaining the water pipes at their property. The South West region was significantly higher compared to all other regions and Wales, apart from the North West.

Figure 5.8 displays the full results for all council tenants. Out of 348 council tenants, 157 (45%) correctly identified that their local council is responsible for the maintenance of their water pipes. A third of respondents (34%) incorrectly thought that their water company was responsible for the maintenance of the pipes and a further 12% incorrectly thought it was their responsibility.

Figure 5.8: Who do you think is responsible for maintaining the water pipes at your property?



Base: All council tenants (348)

Analysis of the results is displayed below:

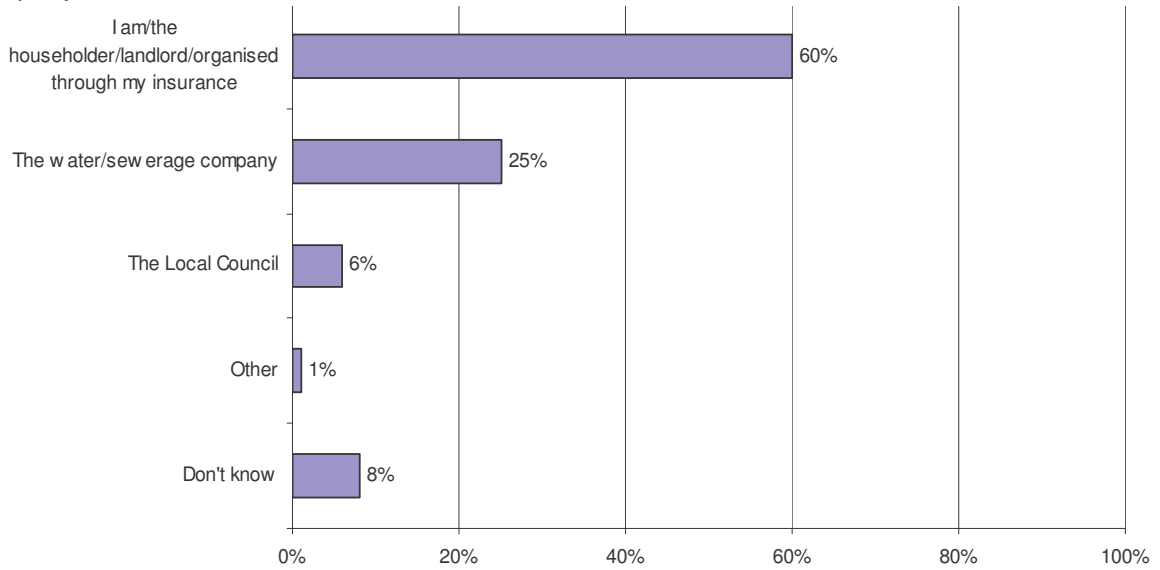
	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
I am/the householder/landlord/organised through my insurance	11%	12%	8%	16%	18%	12%	11%	7%	18%	12%
The Local Council	57%	35%	53%	16%	31%	46%	49%	50%	38%	62%
The water company	30%	41%	31%	68%	38%	34%	29%	21%	32%	23%
Other	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%
Don't know	3%	12%	8%	0%	13%	9%	11%	14%	12%	4%
Base	37	17	59	19	39	68	35	14	34	26

Analysis shows that respondents in the Eastern (57%) and the Midlands (53%) regions were more likely to be correctly aware that the maintenance of their water pipes was their council's responsibility, compared to the Southern region. Incorrectly, 21% - 68% across the regions and Wales thought it was their water/ sewerage company's responsibility for water pipe maintenance.

5.6 Maintenance of sewerage pipes

All respondents were also asked who they thought was responsible for maintaining any sewerage pipes and drains at their property. As with water pipes, the correct answer varies in accordance to whether the respondent is a council tenant or not. For council tenants it's the council who is responsible for maintaining the sewerage pipes and drains at their property. For all others, themselves or their private landlord is responsible. To ascertain whether respondents answered this question correctly, the charts below for this question are based on a) all respondents except council tenants and then b) all council tenants.

Figure 5.9 Who do you think is responsible for maintaining any sewerage pipes or drains at your property?



Base: All respondents except council tenants (1,652)

As with water pipe maintenance, 60% of respondents were correctly aware that they or their landlord were responsible for the maintenance of any sewerage pipes and drains at their property. Incorrectly, 25% thought it was their water/ sewerage company responsibility and 6% thought it was their council's responsibility.

Analysis:

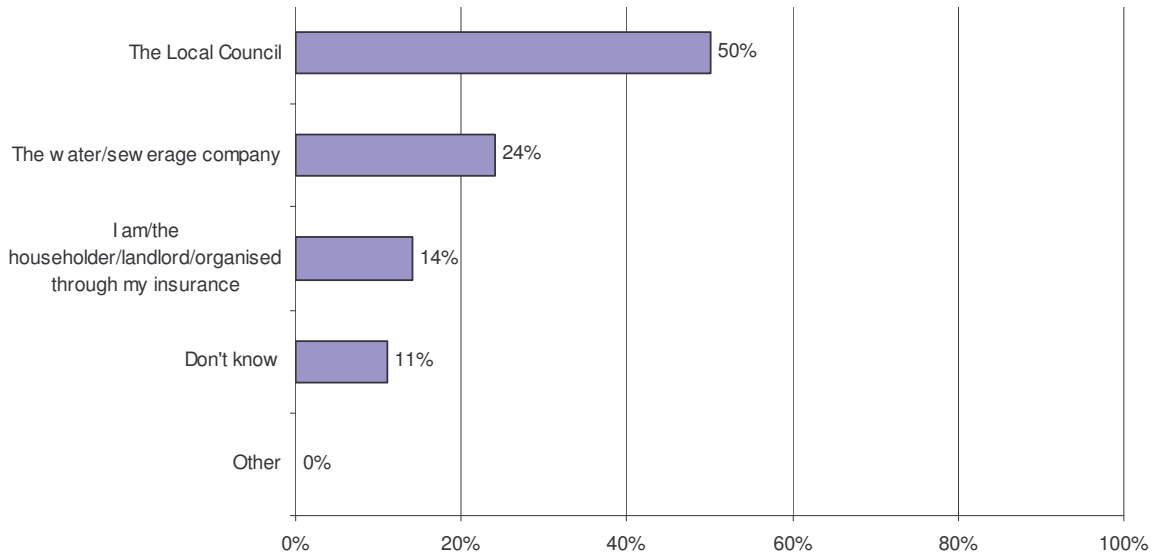
	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
I am/the householder/landlord/organised through my insurance	61%	66%	57%	60%	67%	54%	62%	71%	54%	56%
The Local Council	4%	8%	6%	6%	4%	9%	6%	1%	5%	10%
The water company	29%	18%	27%	27%	22%	22%	26%	20%	31%	27%
Other	1%	3%	2%	0%	0%	3%	1%	0%	0%	1%
Don't know	5%	5%	9%	7%	7%	12%	5%	7%	10%	6%
Base	211	103	245	83	195	252	197	84	159	124

Analysis shows a higher proportion of respondents on the Wessex region were more likely to be correctly aware that they or their landlord is responsible for maintaining any sewerage pipes or drains at their property compared to the Midlands, Thames and Yorkshire regions, and Wales (54-57%).

Figure 5.10 displays the results for all council tenants. Encouragingly, a slightly higher proportion of respondents (50%) knew their council was responsible for any sewerage pipes or drains at

their property compared to water pipe maintenance (45%). However, a quarter (24%) of council tenants incorrectly thought that their water company was responsible for any sewerage pipes or drains at their property, and 14% incorrectly thought that they were responsible.

Figure 5.10 Council tenants - Who do you think is responsible for maintaining any sewerage pipes or drains at your property?



Base: All council tenants (348)

Analysis below:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
I am/the householder/landlord/ organised through my insurance	14%	12%	10%	26%	23%	10%	9%	14%	21%	8%
The Local Council	49%	53%	59%	37%	41%	51%	37%	50%	47%	73%
The water company	35%	29%	20%	26%	26%	25%	31%	21%	21%	8%
Other	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%
Don't know	3%	6%	10%	11%	10%	13%	20%	14%	12%	12%
Base	37	17	59	19	39	68	35	14	34	26

59% of respondents in the Midlands were correctly aware that their local council was responsible for any sewerage pipes or drains at their property, which was significantly higher compared to the North West region.

5.7 Service standards and compensation

Respondents were told that their water company is obliged to meet certain standards for the delivery of services to customers. They were then asked whether or not they were aware that if

the water company fails to meet these standards for reasons within their control then the customer may be entitled to compensation. Overall, 39% of respondents stated they were aware and 60% stated that they were not aware. The results for each region are shown in the table in figure 5.11. Awareness was significantly lower in the Thames region compared with Eastern, Northumbria, South West, Southern, North West and Wessex.

Figure 5.11 Were you aware that if your water and/or sewerage company fails to meet service standards for reasons within their control the customer may be entitled to compensation?

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Yes, was aware	44%	46%	37%	48%	42%	31%	39%	42%	39%	35%
No, was not aware	56%	53%	63%	51%	57%	68%	61%	57%	58%	65%
Base	248	120	304	102	234	320	232	98	193	150

Analysis across the different sub groups showed:

- Male respondents were significantly more likely to state that they were aware that there were occasions where customers may be entitled to compensation from their water company (46% were aware) when compared with female respondents (34% were aware).
- 18-24 year olds and 25-34 year olds were significantly less likely to state that they were aware (26-30%) when compared with older age groups (38-46%).
- White respondents were significantly more likely to state that they were aware (40%) when compared with respondents from other ethnic backgrounds (28%).
- Metered respondents were significantly more likely to be aware (44%) than non-metered respondents (37%)
- Those with water companies with low rates for unmetered bills were less likely to be aware (34%) when compared with those on an average (42%) or high bill (41%). This was also the case with metered bills: 33% of those on a low bill were aware compared with 39% of those on an average bill and 42% of those on a high rate bill.

5.8 Contact with the water companies

Just 12% of respondents (233 people) stated that they had contacted their water company to make an enquiry in the past 12 months. Results by region are shown in the table below.

Figure 5.12 Analysis: Have you contacted your water company to make an enquiry in the past 12 months

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Percentage who had contacted	14%	8%	12%	19%	9%	13%	8%	8%	12%	13%
Number who had contacted	35	10	36	19	22	43	18	8	23	19
Base	248	120	304	102	234	320	232	98	193	150

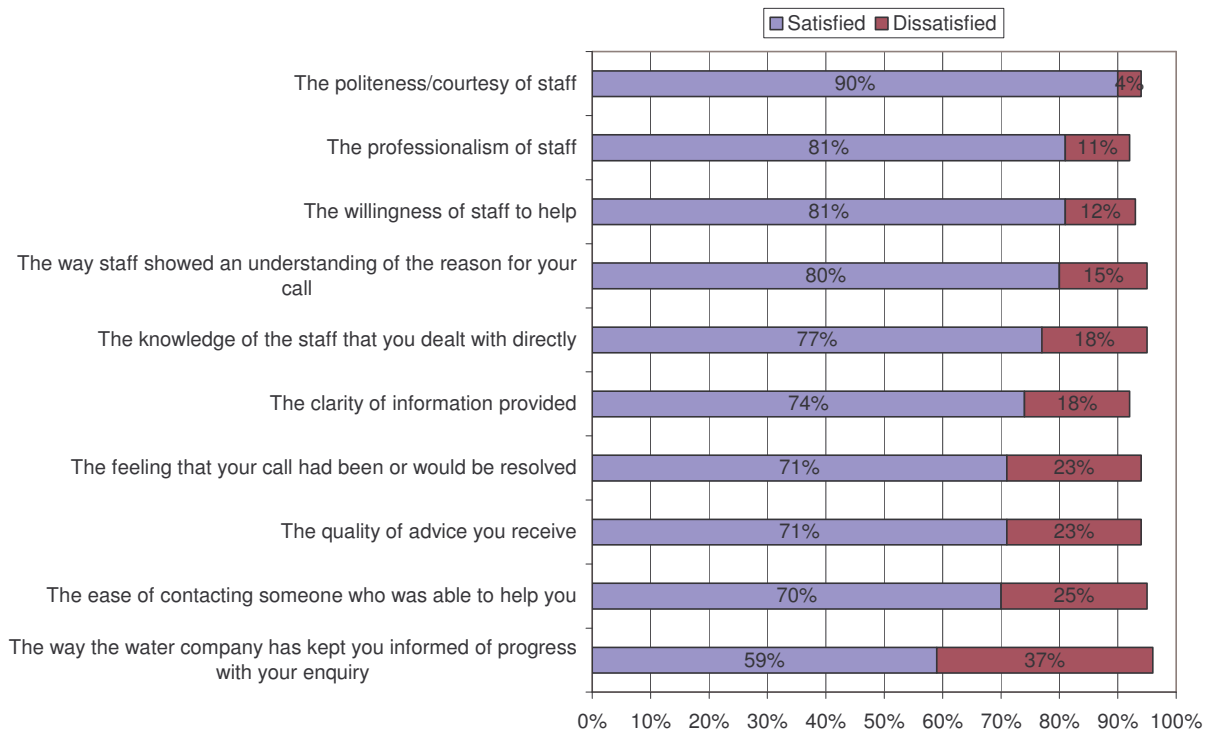
As the base numbers across the regions and Wales are low, subsequent questions in this section will be analysed at the overall level and a breakdown by region/country will not be shown.

The 233 people who stated that they had contacted their water company in the past 12 months were asked what their enquiry was about. Nearly a third (31%) stated that it was a billing enquiry, 13% enquired about their water meter or about having a water meter fitted, 11% were making a complaint, 10% were making a water shortage enquiry and 8% made an enquiry relating to flooding.

Respondents were then asked a series of questions to assess their satisfaction with the contact they had. The results are summarised in the graph and table in figure 5.13.

The graph and table show that satisfaction was highest with the politeness or courtesy of staff; 90% of respondents stated that they were satisfied and 4% stated that they were very satisfied. Satisfaction was lower with the way water companies keep people informed of progress with their enquiries (59% satisfied).

Figure 5.13 Satisfaction with contact with the water company



	Very satisfied	Fairly satisfied	Neither	Fairly dissatisfied	Very dissatisfied
The politeness/courtesy of staff	40%	50%	5%	2%	2%
The professionalism of staff	27%	54%	8%	7%	4%
The willingness of staff to help	31%	50%	8%	8%	4%
The way staff showed an understanding of the reason for your call	31%	49%	5%	10%	5%
The knowledge of the staff that you dealt with directly	22%	55%	5%	13%	5%
The clarity of information provided	23%	51%	9%	11%	7%
The feeling that your call had been or would be resolved	26%	45%	7%	14%	9%
The quality of advice you receive	27%	44%	6%	14%	9%
The ease of contacting someone who was able to help you	32%	38%	5%	16%	9%
The way the water company has kept you informed of progress with your enquiry	20%	39%	4%	23%	13%

Base: all who had contacted their water company in the past 12 months (excluding those answering don't know)

Figure 5.14 shows the performance of the water companies against the ORC International private sector benchmark. The private sector benchmark is our business to consumer benchmark (B2C) which we felt was most appropriate for comparing consumer satisfaction with the performance of their water company. The question text for the private sector benchmark is also shown in the table below for your reference.

Figure 5.14: Comparison with benchmark questions

Question Text	Water companies	Question Text	Private sector benchmark (B2C)
The professionalism of staff	81%	How satisfied are you with the professionalism/efficiency of staff?	78%
The willingness of staff to help	81%	How satisfied are you with helpfulness/willingness to help of staff?	86%
The way staff showed an understanding of the reason for your call	80%	How satisfied are you that staff show interest in you as an individual/treat you as a valued customer?	81%
The knowledge of the staff that you dealt with directly	77%	How satisfied are you with the level of knowledge shown by staff?	80%
The clarity of information provided	74%	How satisfied are you with the quality of information you receive from ...?	79%
The quality of advice you receive	71%	How satisfied are you with the quality of advice you receive from...?.	79%
The ease of contacting someone who was able to help you	70%	How satisfied are you with the ease of getting through to the call centre?	68%

This table shows that satisfaction with water companies are scoring favourably in comparison to our B2C benchmarks on professionalism of staff and ease of contacting someone to help you. Areas where there could be improvement include the quality of advice received by the customer, the quality of information provided and the willingness of the staff contacted to help the customer.

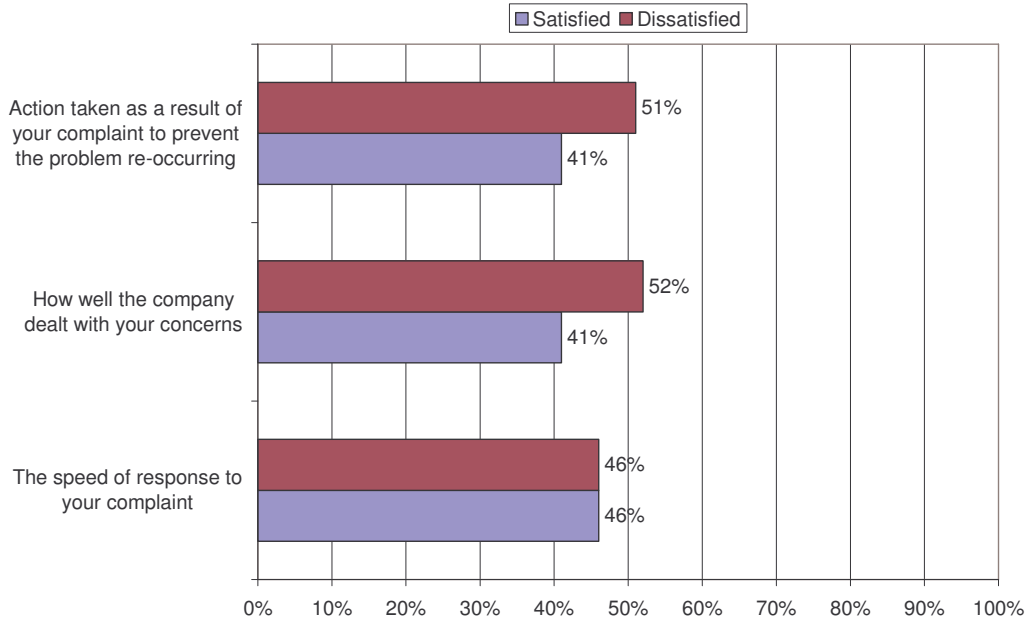
5.9 Complaints

The questionnaire was also designed to assess customers' satisfaction with complaints processes. It has already been stated that of the 233 people who indicated that they had been in contact with their water company in the last 12 months, 11% (26 people) had contacted to make a complaint. An additional question was asked to all respondents except these 26 people in order to verify whether anyone else had made a complaint to their water and sewerage company in the past 12 months. Of the 2,000 respondents a total of 111 people (5%) stated that they had made a complaint (26 original respondents plus a further 85 who said they'd made a complaint when asked directly). These were split across the regions and Wales, as detailed in the table below. As the base numbers are very low subsequent questions in this section will be analysed at the overall level and detailed analysis will not be shown.

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Number who had made a complaint	14	5	16	8	14	16	16	5	9	8
Base	248	120	304	102	234	320	232	98	193	150

Figure 5.15 shows the overall satisfaction levels with various aspects of the complaints process. The base number is relatively low so results should be viewed with a level of caution.

Figure 5.15 Satisfaction with complaints processes



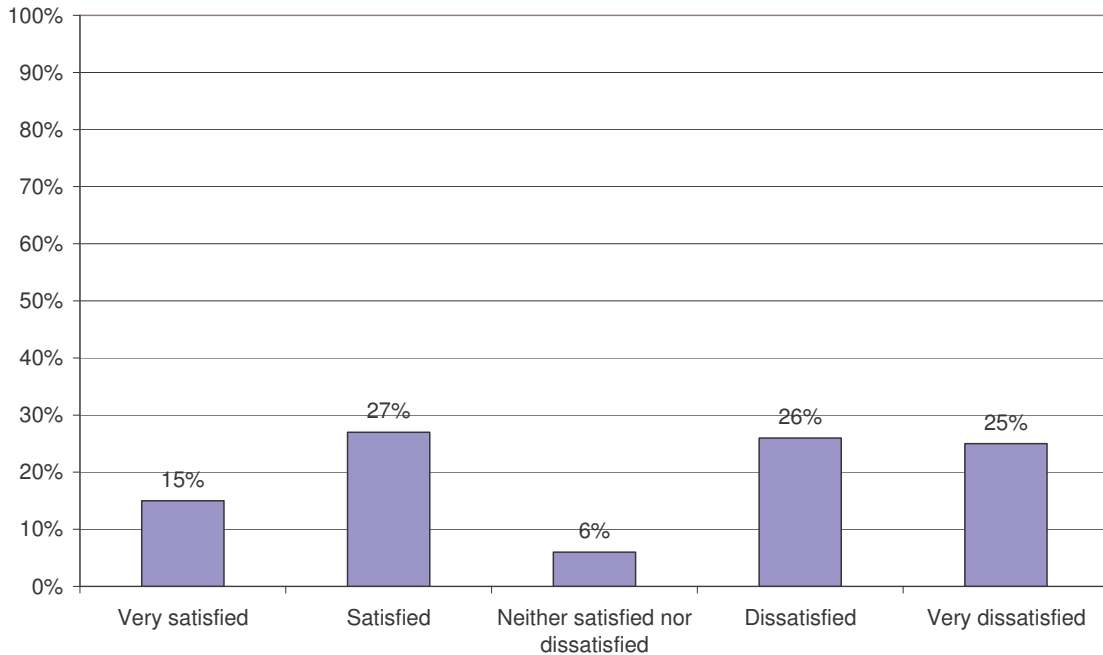
Base: all respondents who had made a complaint in the last year excluding those answering don't know

As the graph shows, less than half of the respondents in each case stated that they were satisfied (either very satisfied or satisfied) with aspects relating to the handling of their complaint. The full results are shown in the table below and indicate that about a quarter of respondents in each case stating they were very dissatisfied, whilst less than a fifth stating that they were very satisfied. Note that it is not uncommon for the results of questions of this type to be relatively low in comparison with other questions asked in a survey.

	Very satisfied	Fairly satisfied	Neither	Fairly dissatisfied	Very dissatisfied
The speed of response to your complaint	19%	27%	7%	21%	25%
How well the company dealt with your concerns	15%	26%	7%	27%	25%
Action taken as a result of your complaint to prevent the problem re-occurring	13%	28%	8%	23%	28%

Respondents were additionally asked to give an overall rating of how satisfied or dissatisfied they were with the way their complaint was handled. The results are shown in figure 5.16. Overall, 42% stated that they were satisfied but 51% stated they were dissatisfied.

Figure 5.16 Overall satisfaction with the way the complaint was handled



Base: all respondents who had made a complaint in the last year excluding those answering don't know (110)

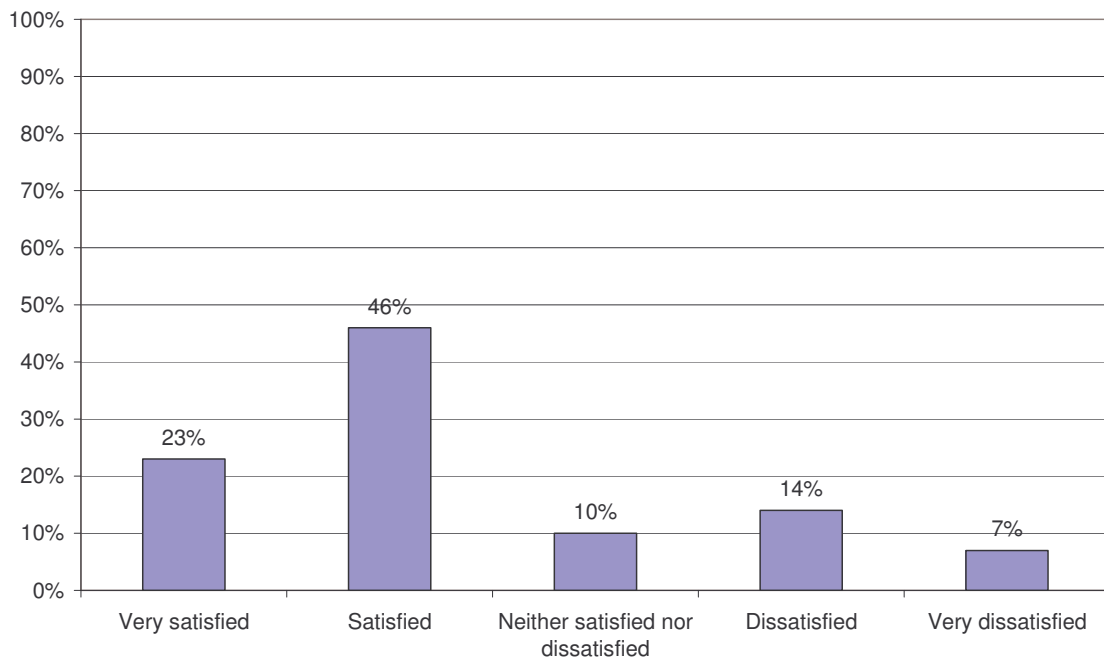
All those who were not satisfied with the way their complaint was dealt with (64 people) were also asked to state how they would have changed the way complaints are processed. The following responses were the most often recorded by at least 5 people each:

- Deal with the complaint quicker/within 24 hours – 12 people.
- Solve the issue behind the complaint – 12 people.
- Take complaints seriously/listen to customers – 7 people.
- More communication or information to explain what will be done as a result of the complaint – 5 people.
- Return calls – 5 people.

5.10 Overall satisfaction with contact

All respondents who had made contact with their water company for any reason in the past 12 months were asked to take everything into account and indicate how satisfied or dissatisfied they were with the contact. Overall, 284 people answered the question; 69% stated that they were satisfied and 21% stated that they were dissatisfied. The full results are shown in figure 5.17. Again, regional/country results are not shown as the base numbers are too low for the figures to be statistically robust.

Figure 5.17 Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water company?



Base: all respondents who had made contact with their water company in the past 12 months excluding those answering don't know (284)

All those who stated that they were not satisfied were asked to explain why. A total of 84 comments were made. A selection of the type of comments made are shown below:

- *'You don't get what you pay for'*
- *'The time it took to get the problem sorted'*
- *'Kept on being passed on to different departments and different people'*
- *'I was dissatisfied in the time it took to speak to somebody'*
- *'Customer service is poor - water is a free thing, if it is going to cost, then it should be good'*

6 Water on Tap

Key findings:

- 92% are satisfied overall with aspects of their water supply. A high number of respondents (at least 8 in 10) were satisfied with various aspects of their water supply such as water pressure, colour and appearance of tap water and reliability of their water supply. The only factor with less than 8 in 10 being satisfied was hardness/softness of water (68%).
- The most common suggestion for improving the overall service provided by the customers' water company is to reduce prices. Customers in the South West region were most likely to state this as an improvement. The second most common suggestion for improvement was the quality of water. Customers in Eastern, Thames and Wessex regions were most likely to state this improvement.
- The vast majority of customers feel that the service they have received from their water company in the last 12 months has stayed the same (90%). Respondents in the South West region were more likely to say that the service received had improved.
- A high number of respondents say they recognise the need to minimise wasteful use of water (95%) and take action to minimise this (94%). 7 in 10 drink tap water and recognise it is good for their health.
- 57% of respondents were aware of campaigns for using water wisely in the home or garden but almost a third were unaware (32%). Those in the Southern region were more likely to be aware of campaigns.
- Of those who were aware of campaigns, over three quarters of respondents were made aware via TV (77%), with the second highest scoring media being newspapers/magazines (49%). Those in Thames were more likely to be aware via radio and those in the South West via mail from their water company.

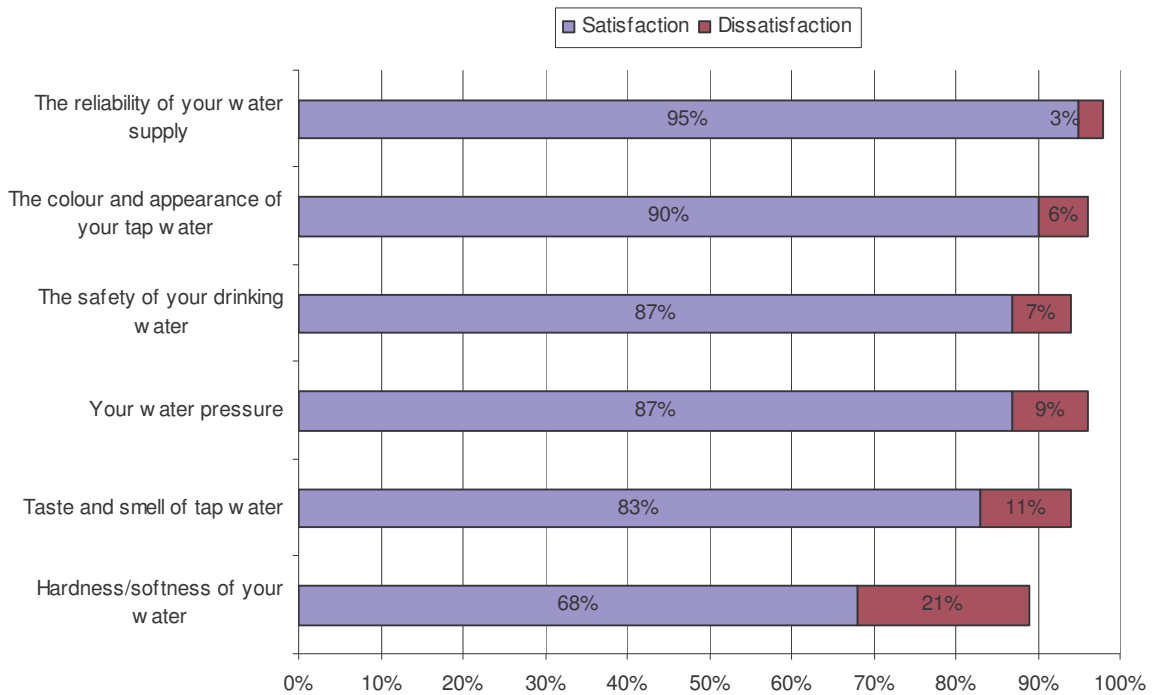
6.1 Water supply

Respondents were asked a series of questions to assess their satisfaction with their water supply and Water Company. Respondents were also asked questions about awareness of any water campaigns.

The figure and graph in 6.1 displays the summary of results for different aspects of respondents' water supply. 95% of respondents were satisfied/very satisfied with the reliability of their water supply and over 8 in 10 were satisfied/very satisfied with all other aspects – with the exception of hardness/softness of their water supply (68%).

Respondents aged 75+ years are more likely to be satisfied (100% satisfied/very satisfied) with the different aspects of their water supply compared to every other age group, apart from 61-74 years.

Figure 6.1 shows respondents satisfaction with different aspects of their water supply.



Base: all respondents excluding those answering don't know (1,993)

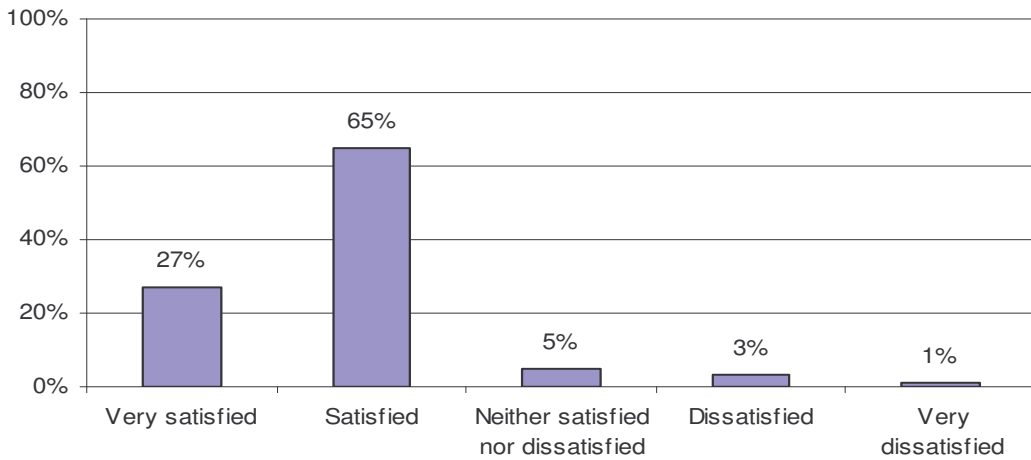
	Very satisfied	Satisfied	Neither	Dissatisfied	Very dissatisfied	Base
The colour and appearance of your tap water	32%	59%	4%	5%	1%	1,993
Taste and smell of tap water	24%	59%	7%	9%	2%	1,949
Hardness/softness of your water	13%	55%	12%	17%	4%	1,881
The safety of your drinking water	24%	63%	6%	6%	1%	1,907
The reliability of your water supply	32%	63%	2%	2%	*%	1,989
Your water pressure	24%	62%	4%	7%	2%	1,987

*Less than 1%

6.2 Overall satisfaction

Analysis of all aspects of the water supply show 92% of respondents were satisfied/very satisfied overall whereas only 4% were dissatisfied/very dissatisfied. Figure 6.2 displays the detailed results of respondents' overall satisfaction.

Figure 6.2 Taking all those aspects into account, overall how satisfied or dissatisfied are you with your water supply?



Base: All respondents except those answering don't know (1,994)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Very satisfied	29%	31%	26%	27%	23%	19%	32%	30%	35%	31%
Satisfied	62%	65%	69%	66%	69%	69%	60%	61%	58%	62%
Neither satisfied nor dissatisfied	4%	2%	4%	6%	5%	6%	5%	6%	5%	4%
Dissatisfied	4%	3%	2%	1%	3%	4%	3%	3%	3%	3%
Very dissatisfied	1%	0%	*%	0%	0%	2%	0%	0%	1%	1%
Total Satisfied, exc. DK	91%	96%	94%	93%	92%	88%	92%	91%	92%	93%
Total Dissatisfied, exc. DK	5%	3%	2%	1%	3%	6%	3%	3%	3%	3%
Base	247	120	304	102	233	316	232	98	193	150

Note: *% means more than 0% but less than 0.5%

Analysis shows that the majority of respondents are satisfied with all aspects of the water supply (ranging from 88% - 96% satisfied/very satisfied).

Respondents were asked the question “If you could make one improvement to the overall service provided by your water company what would it be?”. The most common responses were as follows:

- 23% would reduce prices.
- 14% would improve quality of the water.

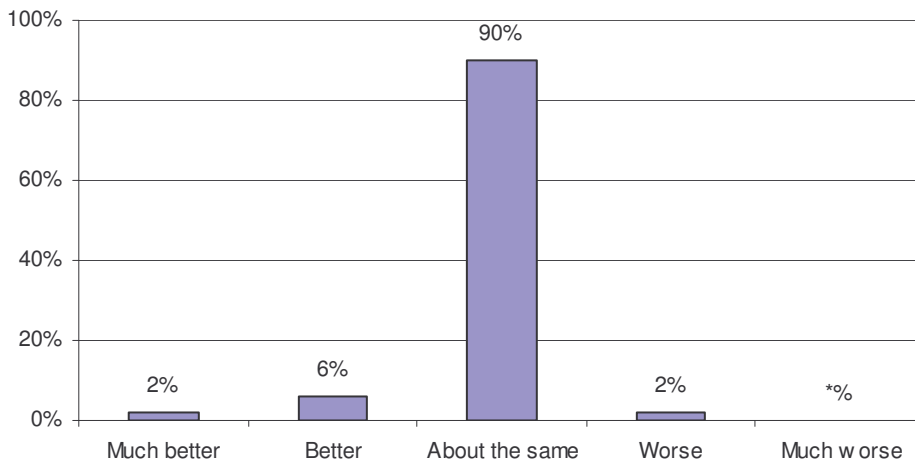
Differences in these improvements include:

- A significantly higher number of respondents from the South West region cited price reduction as an improvement compared to those from all other regions and Wales (48% vs 13-35%).
- A significantly higher number of respondents from Eastern, Thames and Wessex regions would improve the quality of water compared with

Northumbria, Midlands, South West and North West regions, and Wales (20-23% vs 6-11%).

Figure 6.2 displays the results from respondents rating how much, if at all, the service they received from their water company had changed over the past year. The vast majority of respondents said it was about the same (90%), just 2% said the service had deteriorated (worse/much worse).

Figure 6.2 how do you think the service from your water company has changed over the past year?



Base: all respondents except those answering don't know (1,908)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Much better	*%	0%	1%	2%	2%	2%	2%	0%	3%	2%
Better	7%	3%	5%	12%	5%	3%	6%	3%	10%	6%
About the same	89%	96%	91%	85%	91%	90%	89%	96%	84%	88%
Worse	2%	2%	2%	1%	2%	4%	2%	1%	2%	3%
Much worse	1%	0%	0%	0%	0%	1%	0%	0%	1%	1%
Total Better, exc. DK	7%	3%	6%	14%	7%	5%	9%	3%	13%	8%
Total Worse, exc. DK	3%	2%	2%	1%	2%	5%	2%	1%	2%	4%
Base	241	115	289	97	223	305	222	92	180	145

Analysis shows that the general consensus across the regions and Wales is the service from the water companies has remained the same over the past year (ranging from 84% - 96%). 14% of respondents in the South West, and 13% in the Yorkshire Region said the service had improved; this is significantly higher comparatively – with the exception of the North West region and Wales.

Other differences between sub groups:

- Respondents aged 75+ years were significantly more likely to say that the service over the past year was *much better* when compared to all other age groups (7% vs 0%-2%).

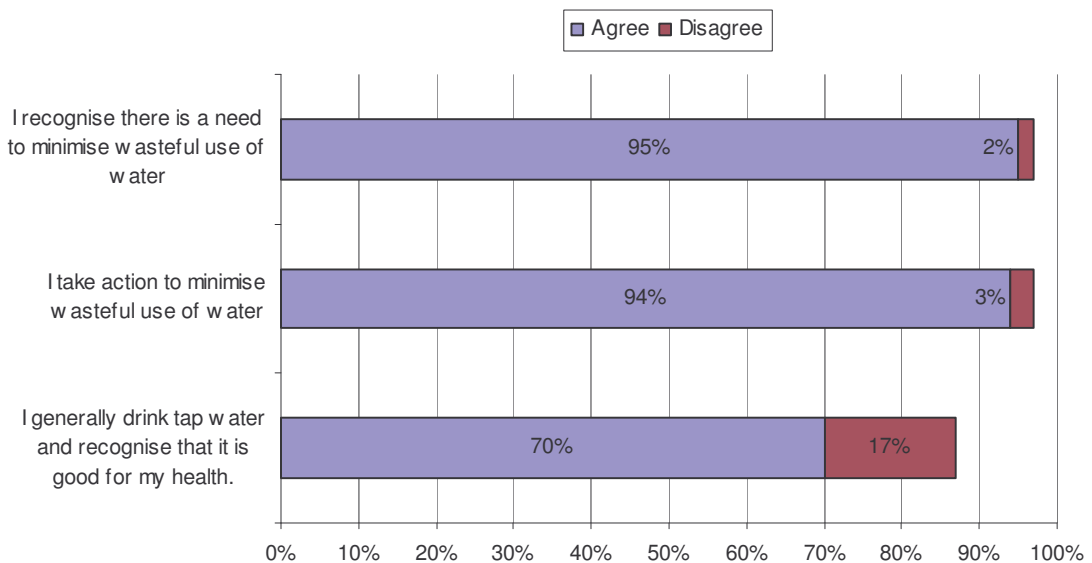
If respondents thought the service was better, they were then asked why they thought this. 142 respondents answered this question and answers included the following:

- 20% better monitoring.
- 18% better water quality.
- 12% improved customer service.

6.3 Water awareness

Figure 6.3 shows that 95% of respondents agreed/strongly agreed that there is a need to minimise wasteful use of water and a similarly high number take action to minimise wasteful use of water (94%). 7 in 10 drink tap water and recognise it is good for their health. The results displayed in the graph and table in 6.3 should be taken with caution, due to the responses to these questions being socially desirable.

Figure 6.3 How much do you agree with the following statement?



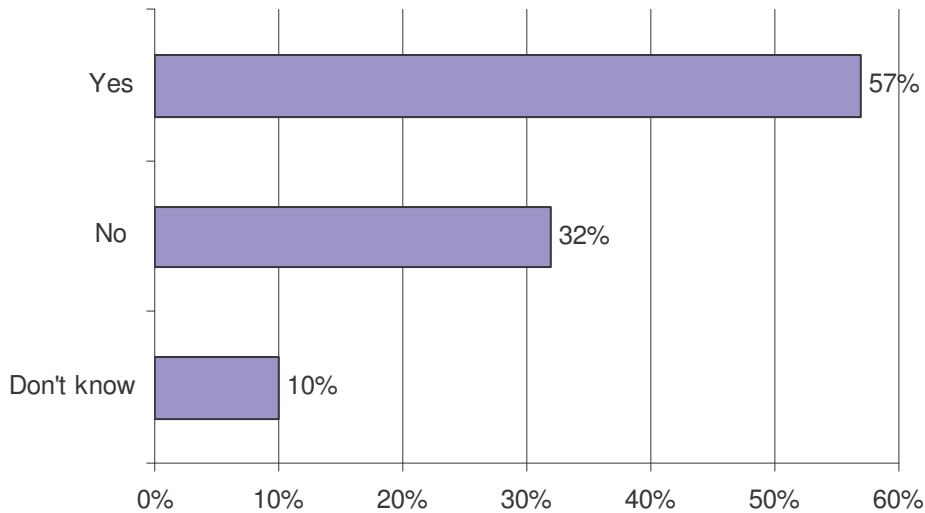
	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Base
I generally drink tap water and recognise that it is good for my health.	22%	48%	13%	13%	4%	1925
I take action to minimise wasteful use of water.	35%	59%	3%	2%	*%	1981
I recognise there is a need to minimise wasteful use of water	45%	51%	3%	2%	*%	1984

* Less than 1%

6.4 Water campaigns

57% of respondents were aware of water campaigns for using water wisely in the home or garden, 32% were unaware and 10% did not know. The table and graph in 6.4 show detailed results.

Figure 6.4 Are you aware of any campaigns to use water wisely in the home and garden?



Base: all respondents (2,000)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Yes	62%	50%	51%	62%	68%	67%	48%	59%	49%	52%
No	27%	37%	39%	31%	22%	23%	41%	30%	40%	48%
Base	248	120	304	102	234	320	232	98	193	150

Analysis shows that 68% of respondents in the Southern region were aware of a water campaign; this is significantly higher compared to lowest results from Northumbria, the Midlands, North West and Yorkshire regions, and Wales.

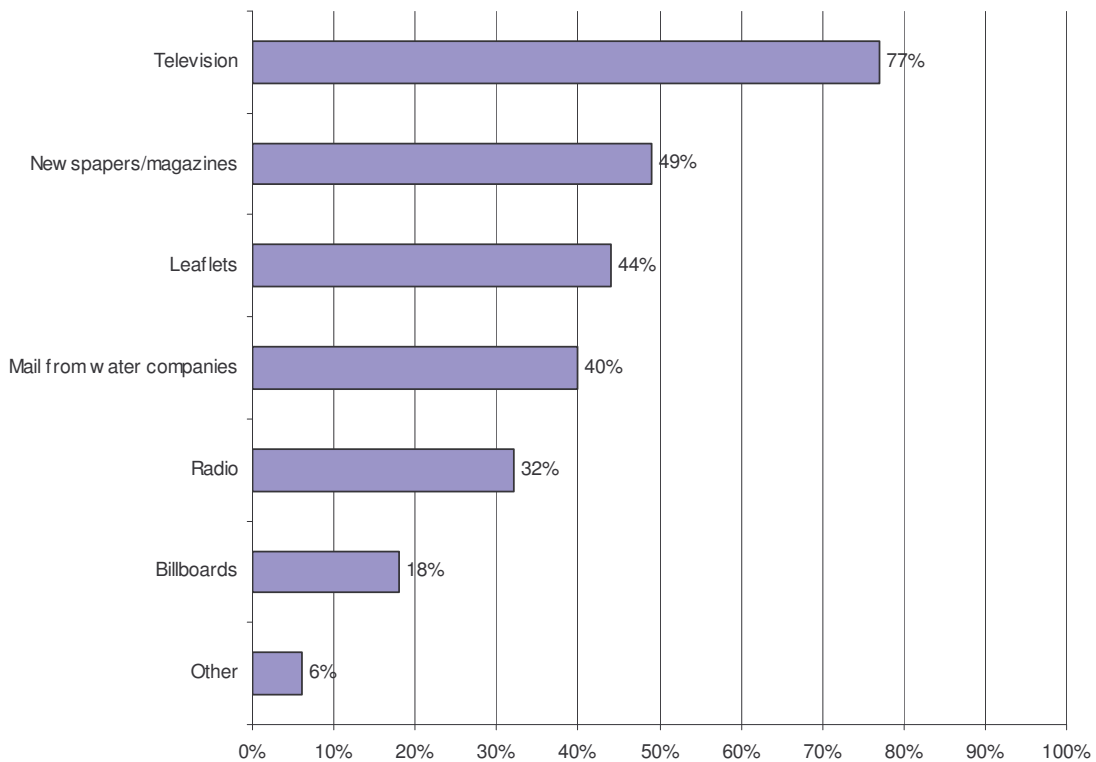
Other differences between sub groups:

- Respondents in the 45-60 age group were significantly more likely to be aware of a water campaign, compared to many other age groups (63% vs 36-54%).
- Customers of Southern Water Services Ltd and Thames Water Utilities Ltd were significantly more likely to be aware of a water campaign compared to customers of several other Water Companies (66% vs 48%-52%).

6.5 How respondents were made aware of water campaigns

77% of respondents were made aware of water campaigns via the television, with 49% being made aware through newspapers and magazines. Figure 6.5 displays the different media

through which respondents were made aware of water campaigns. Please note that respondents could answer 'yes' for more than one type of media.



Base: all aware of campaigns except those answering don't know (1125)

Analysis:

- 39% of respondents in the Thames region were made aware of water campaigns through radio, which is significantly higher when compared to the lowest results in Northumbria, the Midlands, South West and Yorkshire (19-27%).
- 54% of respondents from the South West region were made aware of water campaigns through receiving mail from their water company, which is significantly higher when compared to several other regions –Northumbria, Midlands, Thames, North West and Yorkshire – and Wales (27-38%).
- Respondents in the age groups 35-60 years were significantly more likely to be made aware of water campaigns via the television when compared to those in the 25-34 age group (78% vs 67%).

7 Flush and go

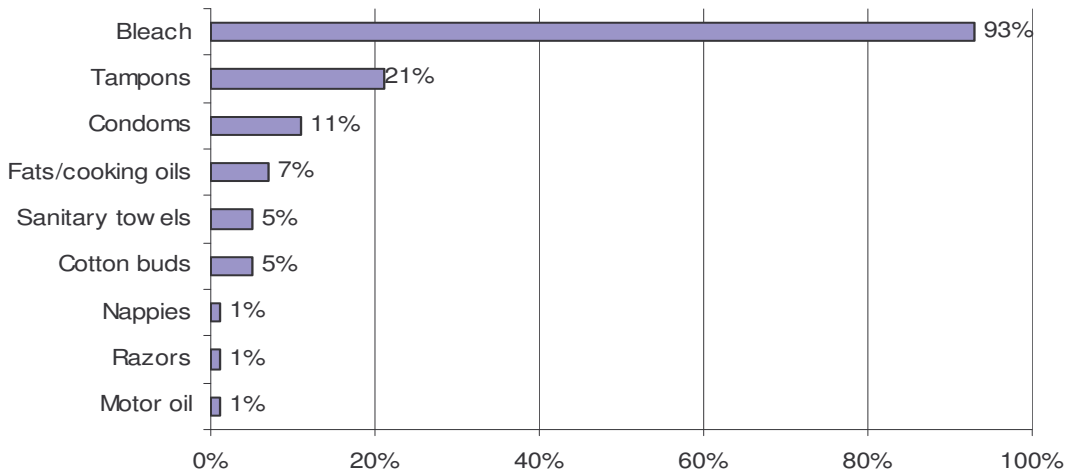
Key Findings:

- 93% of respondents think it is acceptable to dispose of bleach down the toilet or sink, showing that there is considerable room for raising awareness that this should not be done.
- The second and third highest items respondents believed, incorrectly, that they could dispose of down the toilet were tampons (21%) and condoms (11%). Reassuringly other items asked about which shouldn't be disposed in this way had 7% or less respondents saying they could be.
- There is a high level of awareness of what happens to waste water that goes down the toilet or sink, with 92% stating correctly that it is cleaned at a treatment site.
- Overall satisfaction with sewerage services is 88%, with those in the Midlands region more likely to be satisfied. There is a high level of satisfaction too with the customers' sewerage company management of reducing smells from sewerage works (71%), maintenance of sewerage pipes and treatment works (78%), minimisation of sewer flooding (78%) and waste water being cleaned properly (85%).
- When respondents were asked what would most improve their sewerage service, most commonly reduction in prices (7%), clean sewer pipes and reduction of smells (both 5%) were mentioned.

7.1 Disposing of items

Figure 7.1 displays the results for what respondents thought was acceptable to be disposed of down the toilet. A vast majority of respondents think it is acceptable to dispose of bleach down the toilet or sink (93%) and 1 in 5 think it is acceptable to dispose of tampons down the toilet (21%). None of these are acceptable, showing there is room for improving public awareness. Regional/country analysis will not be shown as base figures are too low for the results to be statistically robust.

Figure 7.1 Which of the following do you think are acceptable to dispose of down the toilet or sink?



Base: all respondents except those answering none or don't know (1,489)

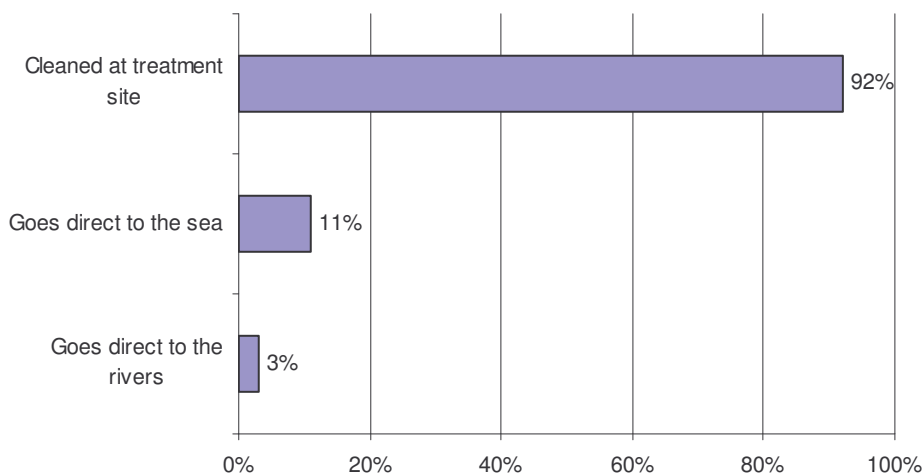
Other differences between sub groups included:

- Respondents in the 75+ age group were significantly more likely to think it was acceptable to dispose of fats and cooking oils down the sink or toilet, compared to the 35-74 age groups (13% vs 4-5%).

7.2 Waste water

Figure 7.2 shows that over 9 in 10 respondents correctly state that waste water in the toilet or sink in their property is cleaned at treatment sites (92%). 11% incorrectly thought it went straight to the sea and 3% of respondents incorrectly thought it went straight to the river. Again, because of low base sizes, regional/country analysis will not be shown.

Figure 7.2 What do you think happens to the waste water that goes down the toilet/sink in your property?



Base: all respondents except those answering nothing, don't know or other (1,353)

7.3 Satisfaction with the sewerage services

Respondents were asked a series of questions to assess their satisfaction with their sewerage company’s management of different aspects of their sewerage service and their overall satisfaction. Bases are too low to show regional/country analysis of the results.

Table 7.3 How satisfied are you with your sewerage company’s management of the following aspects?

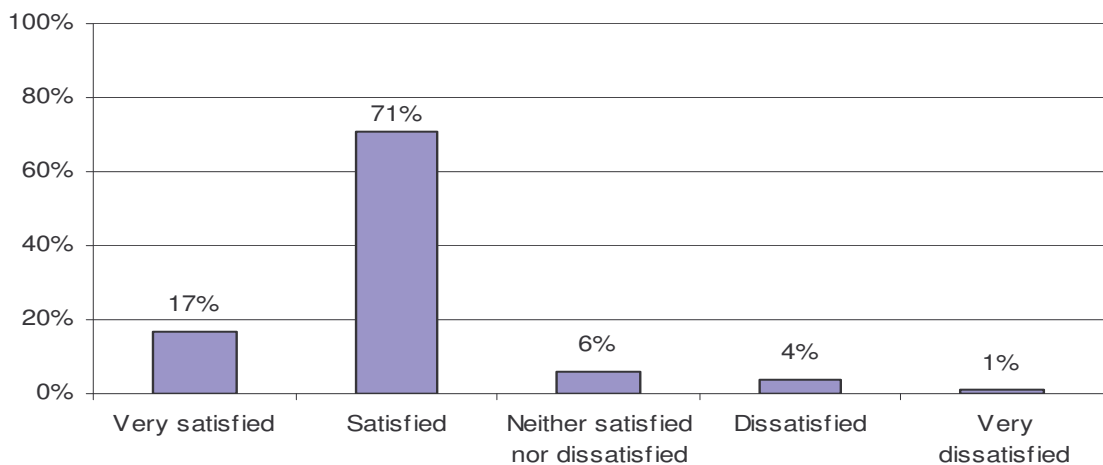
	Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Base
Reducing smells from sewage treatment works	12%	59%	20%	7%	2%	1669
Maintenance of sewerage pipes and treatment works	11%	67%	16%	6%	1%	1717
Waste water is cleaned properly before being released back into the environment	14%	71%	11%	4%	*%	1724
Minimising sewer flooding	11%	67%	12%	9%	1%	1700

*Less than 1%

The range of scores for satisfaction (satisfied/very satisfied) for different aspects of sewerage services is 71-85%. Therefore the majority of respondents were satisfied with their sewerage company’s management.

Figure 7.4 shows that overall 88% of respondents were satisfied/very satisfied with their sewerage service. Only 5% were dissatisfied/very dissatisfied. Full results are displayed below.

Figure 7.4 Taking all aspects into account, overall how satisfied or dissatisfied are you with your sewerage service?



Base: all respondents except those answering don’t know (1,932)

Table 7.4 Analysis: Taking all aspects into account, overall how satisfied or dissatisfied are you with your sewerage services?

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Very satisfied	19%	21%	17%	13%	12%	12%	23%	19%	21%	17%
Satisfied	66%	72%	74%	71%	77%	74%	68%	66%	69%	72%
Neither satisfied nor dissatisfied	9%	4%	4%	9%	6%	7%	6%	12%	5%	7%
Dissatisfied	5%	3%	3%	6%	4%	5%	3%	2%	4%	5%
Very dissatisfied	1%	0%	1%	0%	1%	2%	0%	1%	1%	0%
Total Satisfied, exc. DK	85%	93%	92%	85%	90%	86%	91%	85%	90%	88%
Total Dissatisfied, exc. DK	6%	3%	4%	6%	5%	7%	3%	3%	5%	5%
Base	233	115	298	97	230	308	227	93	188	144

Analysis of the results shows that 92% of respondents from the Midlands region were satisfied/very satisfied with their sewerage service overall; this is statistically higher when compared to the lowest results from Eastern, South West and Thames regions (85%, 85% and 86% respectively). In addition, those in Northumbria are significantly more likely to say they are satisfied with their sewerage service overall (93%) compared with those in Eastern and South West (both 85%). Note that, though Wessex is lower than the Thames in terms of satisfaction, this is not significantly significant compared to other regions because of the lower base size.

Respondents were asked what they would improve to their sewerage service. Answers varied across several categories, for example repairs, prices and better sewerage systems. The most common answers given were:

- 7% reduce prices.
- 5% clean sewer pipes.
- 5% reduce smells.

Other responses included better recycling (2%), better repairs to water pipes (2%) and generally improve the service (2%). It is pleasing to note that 6% of respondents had no improvements to note. 10% of people in the South West region (10 people) would improve recycling services, which is statistically higher compared to any other region.

8 Speaking up for water consumers

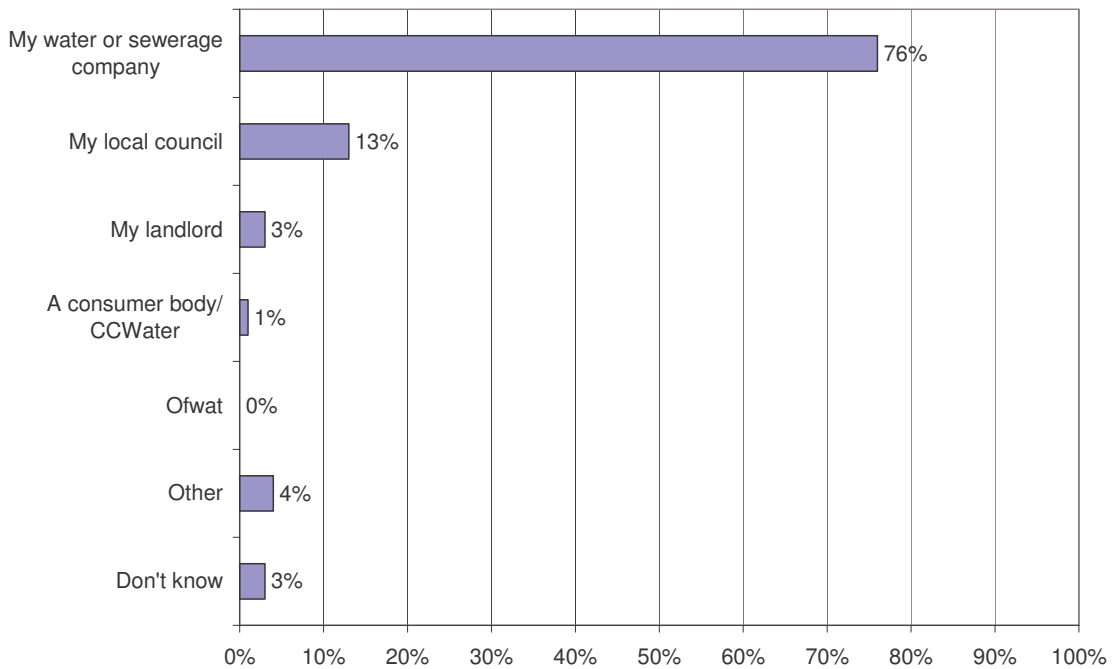
Key findings:

- Over three quarters of respondents would contact their water or sewerage company if they had a problem with their water or sewerage services (76%), with only 1% of respondents saying they would contact a consumer body or CCWater.
- One third of respondents had heard of CCWater (32%) and awareness was highest among those in the South West region. Of those who are aware, over half said they did not know anything about CCWater when prompted (56%). Those who did give an answer most commonly said that CCWater was a consumer or regulatory body (18% and 10%).
- Despite a fairly low level of awareness, the vast majority do feel it's important there is a consumer body representing their interests about the water and sewerage service they receive (93%).
- By far the most preferred method of contact with CCWater is telephone (75%), with the next preferred option of email being stated by only 9% of respondents. Only 3 respondents who were aware of CCWater had made contact in the past year.
- Those who were aware of and knew something about CCWater were positive that they knew how to contact CCWater (69%) and that CCWater is effective in representing their views (60%). Just under half had seen references to CCWater or CCWater press notices (49%).
- Respondents were asked, unprompted, how they would like to get information relating to water and sewerage services. 17% of respondents would prefer a leaflet or insert with their bill and 16% would prefer to use the internet to get information (but only 2% explicitly stated they would use CCWater's website). Those in the South West were more likely than others to say they would like to get information via consumer organisation mailings.

8.1 Contact points

When asked who they would contact if they had a problem with their water or sewerage services just 1% of respondents (17 people) stated that they would contact a consumer body or CCWater. The majority of people stated that they would contact their water or sewerage company (76%). The graph shows that 13% of respondents indicated that they would contact their local council. Of these 255 people, 181 were council tenants. The full results are shown in figure 8.1.

Figure 8.1 Who would you contact if you had a problem with your water or sewerage services?



Base: all respondents (2,000)

Respondents were asked if they had heard of the Consumer Council for Water. A third of respondents said they were aware of CCWater (32%). This is a positive result for CCWater, pointing to a higher level of awareness than expected among consumers. This provides a baseline level of awareness which can be tracked in future years. CCWater could also consider prompting respondents in future surveys on how they have become aware of them, to get more detailed information on the ways in which CCWater’s profile is being raised.

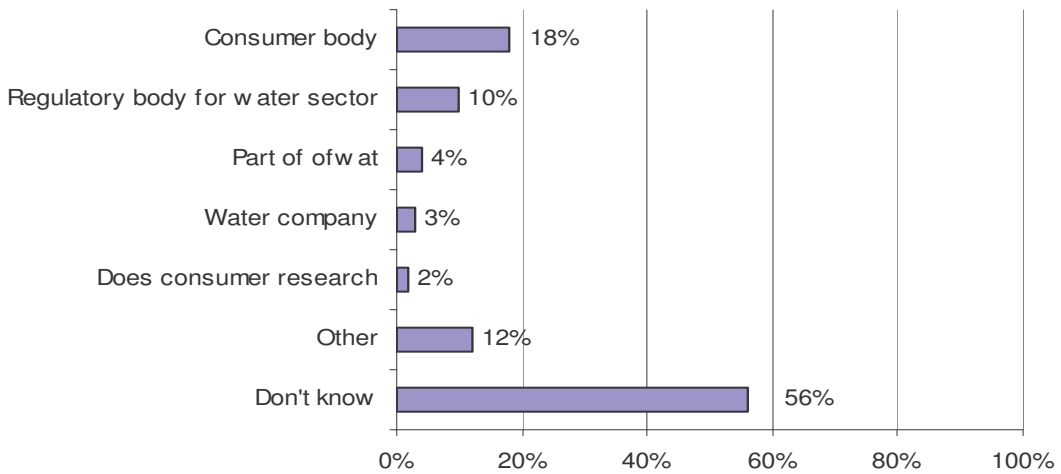
Table 8.2 Analysis – have you heard of the Consumer Council for Water?

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Yes, had heard of CCWater	33%	33%	33%	40%	34%	28%	31%	37%	31%	32%
No, had not heard of CCWater	67%	68%	65%	60%	65%	70%	69%	62%	68%	67%
Base	248	120	304	102	234	320	232	98	193	150

Four in ten respondents in the South West region had heard of Consumer Council for Water, this is statistically higher than awareness levels in the Thames region (40% vs 28%). Statistically more respondents aged 18-24 years (87%) and 25-34 years (84%) had not heard of CCWater compared to older respondents (57-70%).

All those who said they had heard of CCWater were asked what, if anything, they knew about CCWater. Almost 6 in 10 said they did not know anything (56%). Of those who did give a response, most commonly they said CCWater was a consumer body or regulatory body for the water sector (18% and 10% respectively).

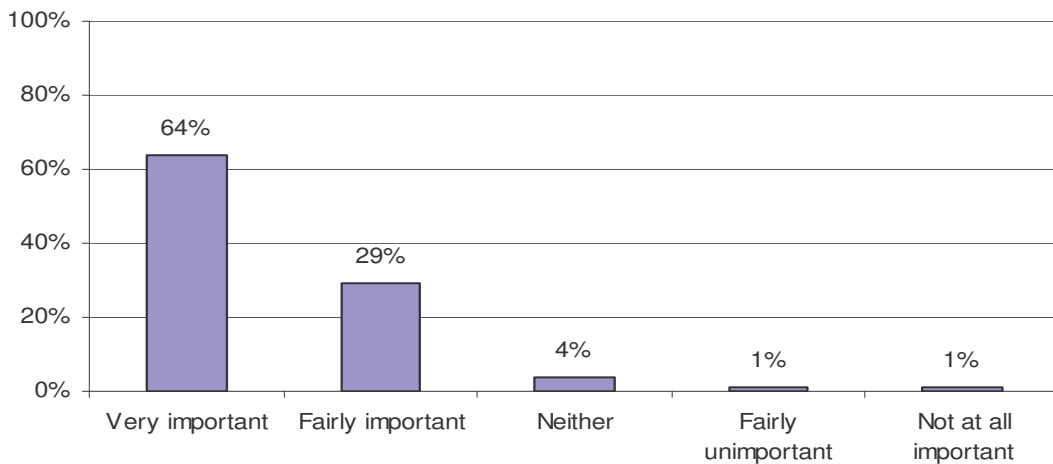
Figure 8.3 What, if anything, do you know about the Consumer Council for Water?



Base: All those who had heard of CCWater (648)

Respondents were asked to assess how important CCWater is to the public. Overall, 93% of respondents think it is fairly/very important to have a consumer body representing their interests, with only 1% saying it is not at all important. Full results are shown in the figure 8.3a.

Figure 8.3a How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive?



Base: all respondents (2,000)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Very important	62%	59%	65%	61%	59%	66%	63%	64%	67%	70%
Fairly important	31%	33%	29%	33%	33%	26%	30%	27%	27%	22%
Neither	4%	4%	5%	3%	3%	6%	4%	6%	5%	4%
Fairly unimportant	2%	1%	*%	1%	3%	2%	1%	0%	1%	3%
Not at all important	1%	3%	1%	2%	1%	1%	2%	2%	1%	2%
Total important, exc. DK	93%	93%	94%	94%	92%	91%	93%	92%	93%	91%
Total unimportant, exc. DK	3%	3%	2%	3%	4%	3%	3%	2%	2%	5%
Base	245	120	299	101	229	317	231	95	192	148

Note: *% means more than 0% but less than 0.5%

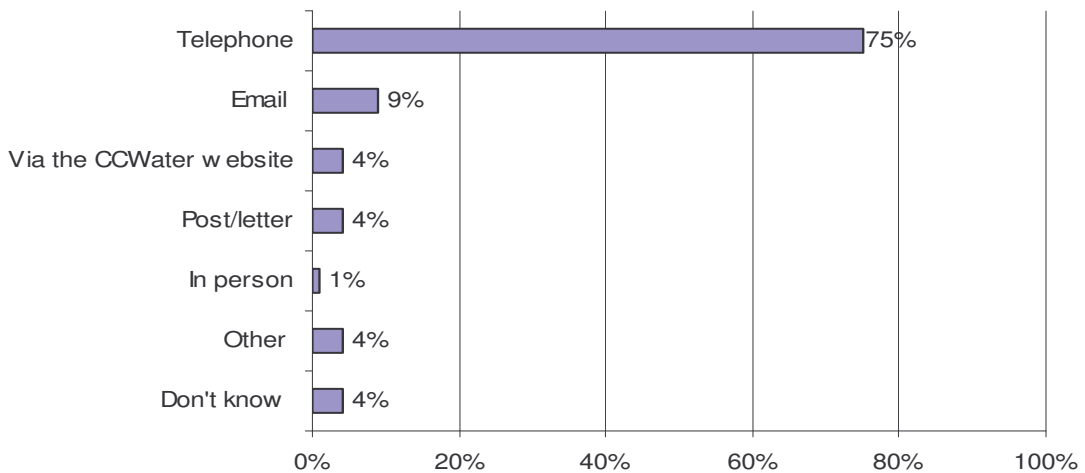
Analysis of the results shows for all regions and Wales that over 9 in 10 respondents thought it was fairly/very important to have a consumer body for water and sewerage.

Differences between sub groups included:

- Significantly more respondents aged 18-24 years said it was important (fairly/very) to have a consumer body for water and sewerage compared to the 75+ age group (97% vs 88%).

Respondents were also asked about their preferred methods of contact with CCWater. The majority of respondents said their preferred method of contact would be telephone (75%); with the second most popular method being email (at only 9%). The graph and figure in 8.4 display the full analysis.

Figure 8.4 If you wanted to get in touch with the Consumer Council for Water what would be your preferred method of contact?



Base: all respondents (2,000)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Post/ letter	3%	5%	2%	5%	3%	4%	5%	2%	6%	3%
Email	11%	10%	7%	7%	10%	10%	9%	14%	6%	7%
Telephone	75%	73%	74%	76%	74%	75%	75%	73%	76%	75%
Via the CCWater website	4%	3%	3%	2%	5%	3%	4%	4%	5%	4%
In person	1%	3%	2%	0%	1%	*%	1%	0%	1%	0%
Other	4%	3%	6%	6%	3%	3%	3%	3%	3%	9%
Don't know	2%	3%	7%	4%	4%	4%	3%	3%	2%	2%
Base	248	120	304	102	234	320	232	98	193	150

* Less than 1%

Analysis shows that telephone is by far the most popular means of contact across all the regions and Wales, with at least 73% in each region and Wales preferring this method.

Differences between sub groups included:

- Respondents aged 25-34 years were significantly more likely to state email as their preferred method of contact compared to those aged 45-75+ years (14% vs 0-9%).
- Respondents on the lower income brackets (<£10k-£29,999) were more likely to state telephone as their preferred means of contact compared to those earning £40k or more (76-78% vs 58-64%).

Only 3 people who knew about CCWater had made contact in the last year. The three people were from the Southern, Thames and Wessex regions. The reasons given for making contact were to comment on a service (1), to make a complaint (1) and for some other reason (1).

These three respondents were asked how satisfied they were overall with various aspects of customer service from CCWater. The results are noted below and show that, in the main, the respondents were satisfied (with at least 2 of the 3 respondents being satisfied for each of the aspects asked about):

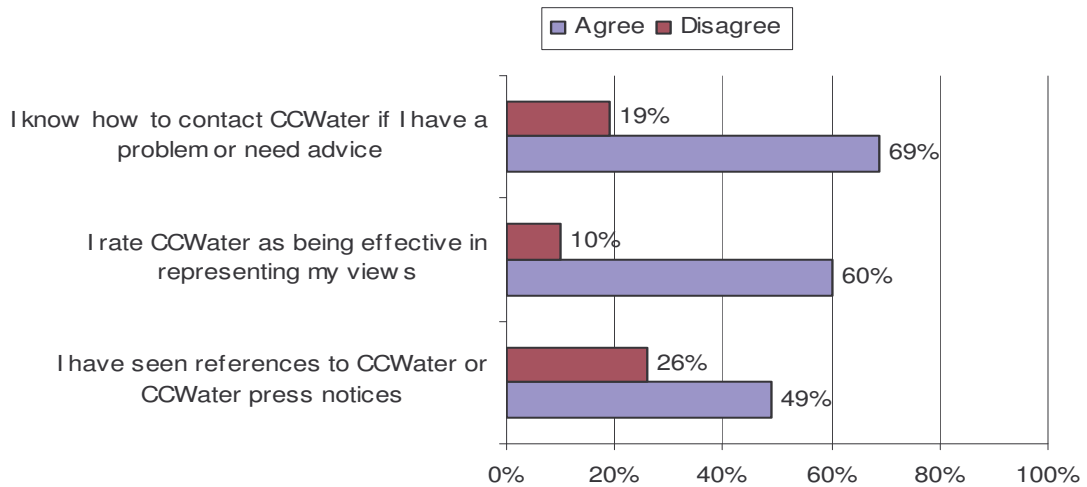
The ease of contacting someone who was able to help you	2 very satisfied, 1 satisfied
The quality of advice you receive	2 very satisfied, 1 dissatisfied
The clarity of information provided	2 very satisfied, 1 dissatisfied
The knowledge of the staff that you dealt with directly	2 very satisfied, 1 satisfied
The politeness/courtesy of staff	2 very satisfied, 1 satisfied
The willingness of staff to help	2 very satisfied, 1 satisfied
The professionalism of staff	2 very satisfied, 1 satisfied

The way that staff showed an understanding of the reason for your call	2 very satisfied, 1 satisfied
The feeling that your call had been, or would be, resolved	2 very satisfied, 1 very dissatisfied
The way that Consumer Council for Water has kept you informed of progress with your enquiry (<i>and / or</i>) claim	2 very satisfied, 1 neither satisfied/ dissatisfied

Respondents who knew something about CCWater were asked several statements and asked to give their level of agreement. Full results are shown in the figure in 8.5 with aggregate scores for agree and disagree displayed. The table in 8.5 shows the level of agreement.

Almost seven in ten agreed that they know how to contact CCWater if they have a problem or need advice (69%) and six in ten agreed that they would rate CCWater as effective in representing their views (60%). Just under half have seen any references to CCWater or CCWater press notices (49%). Regional/country data can not be shown due to the low base sizes.

Figure 8.5 How much do you agree or disagree with the following statements about the Consumer Council for Water?



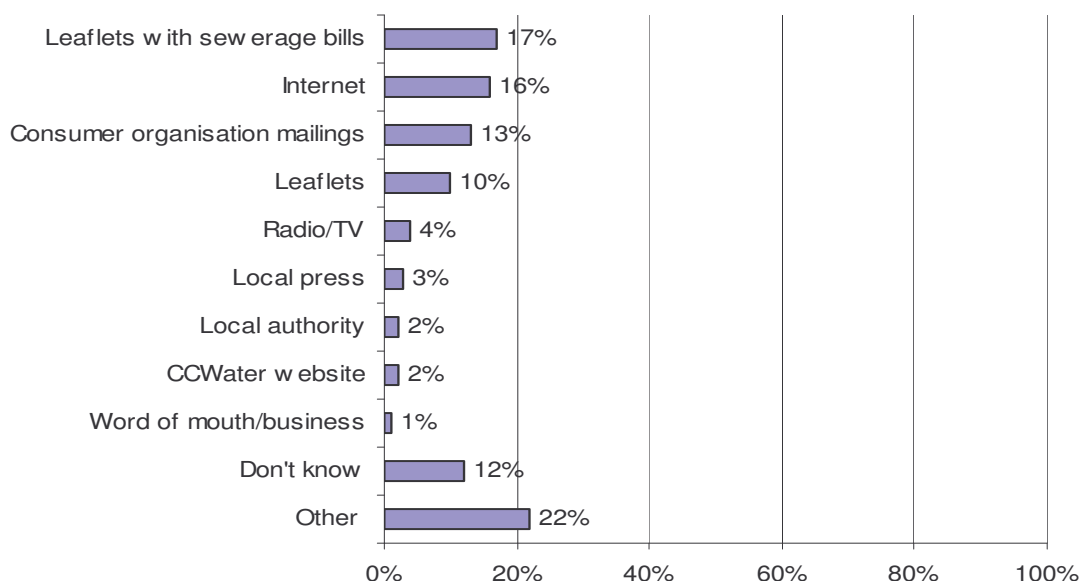
Base: all who knew something about CCWater (237)

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Base
I have seen references to CCWater or CCWater press notices	7%	41%	25%	23%	4%	242
I rate CCWater as being effective in representing my views	7%	54%	30%	8%	1%	207
I know how to contact CCWater if I have a problem or need advice	11%	58%	11%	16%	4%	237

Respondents were asked, unprompted, their preferred source for information relating to their water and sewerage services. 17% of respondents would prefer a leaflet or insert with their bill and 16% of respondents would prefer to use the internet as their source of information (but only 2% of respondents spontaneously said they would use CCWater’s website).

The graph and table in figure 8.6 show the preferred source for information relating to your water and sewerage services.

Figure 8.6 What is your preferred source for information relating to your water and sewerage services?



Base: All respondents (2,000)

Analysis:

	Eastern	Northumbria	Midlands	South West	Southern	Thames	North West	Wessex	Yorkshire	Wales
Leaflets with sewerage bills	15%	15%	18%	15%	18%	17%	18%	14%	19%	21%
Internet	19%	17%	12%	13%	17%	16%	15%	16%	17%	13%
Consumer organisation mailings	13%	18%	12%	20%	12%	11%	14%	14%	11%	11%
Leaflets through the door	12%	8%	11%	10%	7%	9%	8%	12%	10%	10%
Radio/TV	3%	4%	5%	5%	4%	4%	3%	2%	5%	2%
Local press	4%	3%	6%	6%	3%	3%	3%	3%	3%	91%
Local authority	2%	3%	2%	1%	2%	2%	1%	1%	3%	4%
CCWater website	2%	2%	2%	1%	2%	2%	*%	2%	2%	3%
Word of mouth/business	0%	0%	0%	1%	1%	1%	0%	2%	1%	0%
Don't know	10%	9%	15%	13%	10%	20%	10%	10%	11%	10%
Other	21%	23%	21%	20%	24%	16%	28%	22%	21%	21%
Base	248	120	304	102	234	320	232	98	193	150

A higher proportion of respondents in the South West region (20%) would prefer to have information sent through the consumer organisation mailings, compared to lowest results from the Midlands and Thames regions (12% and 11% respectively).

Other differences between sub groups included:

- Those respondents earning more than £20k are significantly more likely to state the internet as a preferred information source than those earning less than this (18-35% vs 8-12%). Indeed, the preference for the internet increases as income rises, with 8% of those earning less than £10k stating it as a preferred option compared to 35% of those earning £60k or more.
- 4 respondents aged 75+ years would use their Local Authority as their information source (6%) which is significantly higher compared to respondents aged 18-24 years (0%) and 35-60 years (1-2%).

Appendices

Council Consumer for Water 93373

2006 Customer Satisfaction Survey Questionnaire

Good morning/afternoon. My name is ... and I am calling from ORC International an independent research consultancy. We are conducting a survey about water and sewerage services on behalf of the Consumer Council for Water.

The survey length is 20 minutes and is intended to help ensure that you get a better service from your water company. If you would like to make an appointment please advise when a suitable time to call back would be.

This call may be monitored as part of our quality control procedures.

Section A Background – ask all

DO NOT ASK

For all respondents:

1. Please record the gender of the respondent

Male
Female

	<i>Route</i>
1	
2	

Firstly, I would like to ask you some questions to ensure that you are eligible to take part in the survey:

2. Are you the water bill payer in your household or do you feel you have enough knowledge to answer questions about your water supply?

Yes
No
Don't know

	<i>Route</i>
1	
2	Fill to quota then ask to speak to the bill payer
99	

3. Do you or any member of your family work in:
READ OUT

The water industry i.e. work for a water company
A Consumer organisation e.g. Energy watch,
Which?, Citizens Advice Bureau
Market research
None of the above

	<i>Route</i>
1	Thank and close
2	Thank and close
3	Thank and close
4	Q4

- 4A. Who is your water company? This may be a company which deals with your sewerage too.
SINGLE CODE – PROMPT WITH HIGHLIGHTED COMPANIES IF NECESSARY

Water and Sewerage Companies		
Anglian Water Services Ltd	1	GO TO Q5
Dwr Cymru Cyfyngedig (Welsh Water)	2	GO TO Q5
Northumbrian Water Ltd	3	GO TO Q5
Severn Trent Water Ltd	4	GO TO Q5
South West Water Ltd	5	GO TO Q5
Southern Water Services Ltd	6	GO TO Q5
Thames Water Utilities Ltd	7	GO TO Q5
United Utilities Water Plc (North West Water)	8	GO TO Q5
Wessex Water Services Ltd	9	GO TO Q5
Yorkshire Water Services Ltd	10	GO TO Q5
Water only companies		
Bournemouth & West Hampshire Water Plc	11	GO TO Q4B
Bristol Water Plc	12	GO TO Q4B
Cambridge Water Company Plc	13	GO TO Q4B
Cholderton & District Water Company Ltd	14	GO TO Q4B
Dee Valley Water Plc	15	GO TO Q4B
Essex & Suffolk Water	16	GO TO Q4B
Folkestone & Dover Water Services Ltd	17	GO TO Q4B
Hartlepool Water Plc	18	GO TO Q4B
Mid Kent Water Plc	19	GO TO Q4B
Portsmouth Water Plc	20	GO TO Q4B
South East Water Plc	21	GO TO Q4B
South Staffordshire Water Plc	22	GO TO Q4B
Sutton & East Surrey Water Plc	23	GO TO Q4B
Tendring Hundred Water Services Ltd	24	GO TO Q4B
Three Valleys Water Plc	25	GO TO Q4B
Don't know	99	Ask respondent to check and arrange call back

IF CODE 11-25 AT Q4A, ASK Q4B. ALL OTHERS GO TO Q5.

- 4B. And who is your sewerage company?
SINGLE CODE – PROMPT WITH HIGHLIGHTED COMPANIES IF NECESSARY

Water and Sewerage Companies		
Anglian Water Services Ltd	1	
Dwr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Don't know	99	

5. Which of the following age groups do you fall into?

READ OUT SINGLE CODE

- 18-24
- 25-34
- 35-44
- 45-60
- 61-74
- 75+
- Refused

1	
2	
3	
4	
5	
6	
7	

6. How would you describe your ethnic background?

DO NOT READ OUT SINGLE CODE

- White:** British
- White:** Irish
- White:** Any other White background
- Mixed:** White and Black Caribbean
- Mixed:** White and Black African
- Mixed:** White and Asian
- Mixed:** Any other Mixed background
- Asian or Asian British:** Indian
- Asian or Asian British:** Pakistani
- Asian or Asian British:** Bangladeshi
- Asian or Asian British:** Any other Asian background
- Black or Black British:** Caribbean
- Black or Black British:** African
- Black or Black British:** Any other Black background
- Chinese**
- Other
- Refused

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	

7. What is the occupation of the main income earner in your household?

CLASSIFY ACCORDING TO FOLLOWING OCCUPATIONAL GROUPINGS. SINGLE CODE

- A – Very senior managerial positions (large organisations) and professional occupations
- B – Senior managerial; business owners. Middle management in large organisations
- C1 – Small employers; junior management and other non-manual occupations
- C2 – Lower supervisory and unskilled workers
- D – Semi skilled and unskilled workers
- E – Casual workers; unemployed and otherwise not working
- Refused

1	
2	
3	
4	
5	
6	
99	

8. What is the total annual income of your household (before tax)?

READ OUT SINGLE CODE

- Less than £10,000
- £10,000 - £19,999
- £20,000 – £29,999
- £30,000 - £39,999
- £40,000 - £49,999
- £50,000 - £59,999
- £60,000 or more
- Don't know/refused

1	
2	
3	
4	
5	
6	
7	
99	

8b What type of accommodation do you live in?

READ OUT AND SINGLE CODE

- Owner occupied
- Private rental
- Council tenant
- Housing Association tenant
- Leaseholder
- Don't know/refused

1	
2	
3	
4	
5	
99	

9. Does your household have a water meter?

- Yes
- No
- Don't know

1	
2	
99	

10. Would you say that you live in an urban or rural area?

- Urban
- Rural
- Suburban/semi rural
- Don't know

	<i>Route</i>
1	
2	
3	
99	

Section B Company Information – ask all

I'd now like to ask you a few questions about your water & sewerage services.

11. How far do you agree or disagree that the bill you receive for water and sewerage services is clear and understandable?

READ OUT

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Don't know

1	
2	
3	
4	
5	
99	

12. How satisfied or dissatisfied are you with the value for money from the water services in your area?

READ OUT

Very satisfied	1	14
Satisfied	2	14
Neither satisfied nor dissatisfied	3	13
Dissatisfied	4	13
Very dissatisfied	5	13
Don't know	99	14

13. Why do you think you don't get value for money for your water services?

Open (specify)	1	14
Don't know	99	

14. How satisfied or dissatisfied are you with the value for money from the sewerage services in your area?

READ OUT

Very satisfied	1	16
Satisfied	2	16
Neither satisfied nor dissatisfied	3	15
Dissatisfied	4	15
Very dissatisfied	5	15
Don't know	99	16

15. Why do you think you don't get value for money for your sewerage services?

Open (specify)	1	16
Don't know	99	

16. How much do you agree or disagree that the water and sewerage charges that you pay are fair?

READ OUT

Strongly agree	1	17
Agree	2	
Neither agree nor disagree	3	
Disagree	4	
Strongly disagree	5	
Don't know	99	

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

READ OUT

Strongly agree	1	18
Agree	2	
Neither agree nor disagree	3	
Disagree	4	
Strongly disagree	5	
Don't know	99	

Section C Consumer Rights & Responsibilities

18. Were you aware that:
Scale: 1=yes, 2=no, 99=don't know

You can pay your water & sewerage bill in instalments e.g. monthly, fortnightly or weekly
 You can pay for your water and sewerage bill by Direct Debit
 You can talk to your water company if you have a problem paying your bill

1	
2	
3	

ASK ALL CODED 2 OR 99 AT Q9 (ALL UNMETERED RESPONDENTS)

19. Were you aware that:
Scale: 1=yes, 2=no, 99=don't know

You can have a water meter fitted free of charge
 If you have requested to have a water meter fitted, you have 12 months to decide whether or not you like it. If you decide you don't like it, you can revert to your original water rate charge for your property. At no point are any extra charges made for trialling this service.

1	
2	

INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is charged for water via a meter you cannot revert to non-metered charges.

ASK ALL

20. Are you aware of or are you currently on the Vulnerable Groups tariff? This was introduced to help people in low income groups who need to use a lot of water.

Yes, have heard of it but am not on it
 Yes, have subscribed to it
 No, but would like to know more
 No
 Don't know

1	
2	
3	
4	
99	

INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them to get in touch with their water company for more information

21. Are you aware of your company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply.

READ OUT

Yes, have heard of them but don't use them
 Yes, have subscribed to them
 No, but would like to know more
 No
 Don't know

1	
2	
3	
4	
99	

INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them to get in touch with their water company for more information

22. Who do you think is responsible for maintaining the water pipes at your property? (If necessary state that you are asking about the water pipes up to the boundary of their property)

DO NOT READ OUT. SINGLE CODE

- I am/the householder/landlord/organised through my insurance
- The Local Council
- The water company
- Other
- Don't know

1	
2	
3	
4	
99	

INTERVIEWER NOTE: If asked, the correct response is that the homeowner is responsible for the maintenance of water pipes at their home up to the boundary of their property (i.e. where the property meets the public highway) if the property was built after 1937.

23. Who do you think is responsible for maintaining any sewerage pipes and drains at your property?

DO NOT READ OUT. SINGLE CODE

- I am/the householder/landlord/organised through my insurance
- The Local Council
- The water/sewerage company
- Other
- Don't know

1	
2	
3	
4	
99	

INTERVIEWER NOTE: If asked, the correct response is that the homeowner is responsible for the maintenance of sewerage pipes and drains at their home up to the point where they meet the main sewer

24. Your water company is obliged to meet certain standards for the delivery of services to customers. Were you aware that if your water and/or sewerage company fails to meet these standards for reasons within their control the customer may be entitled to compensation?

READ OUT

- Yes, was aware
- No, was not aware
- Don't know

1	
2	
99	

READ OUT: Information on service standards and the occasions when customers may be entitled to compensation can be obtained from your water company

ASK ALL

25. Have you contacted your water company to make an enquiry in the past 12 months?

- Yes.....
- No
- Don't know

		<i>Route</i>
1		26
2		28
99		28

26. Why did you contact your water company?
DO NOT READ OUT. MULTICODE

To make a complaint
To make an enquiry relating to drought/water shortage
To make an enquiry relating to flooding
Billing enquiry
Other (please specify)
Don't know

	<i>Route</i>
1	27
2	
3	
4	
5	
99	

27. Thinking about your contact with your water company, overall how satisfied were you with:

Scale: 1= very satisfied, 2= satisfied, 3= Neither satisfied nor dissatisfied, 4= dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.

READ OUT

The ease of contacting someone who was able to help you
The quality of advice you receive
The clarity of information provided
The knowledge of the staff that you dealt with directly
The politeness/courtesy of staff
The willingness to help of staff
The professionalism of staff
The way that staff showed an understanding of the reason for your call
The feeling that your call had been, or would be, resolved
The way that the water company has kept you informed of progress with your enquiry (*and / or*) claim

	<i>Route</i>
2	27
3	
4	
5	
6	
7	
8	
9	
10	
11	

DO NOT ASK THOSE CODED 1 AT Q26

28. Have you made a complaint to your water & sewerage company in the past 12 months?
SINGLE CODE

Yes
No
Don't know

	<i>Route</i>
1	29
2	32
99	32

ASK ALL CODED 1 AT Q26 AND ALL CODED 1 AT Q28

29. How satisfied were you with:
Scale: 1= very satisfied, 2= satisfied, 3= Neither satisfied nor dissatisfied, 4= dissatisfied, 5= very dissatisfied, 99= don't know
READ OUT.

The speed of response to your complaint	1	30
How well the company dealt with your concerns	2	
Action taken as a result of your complaint to prevent the problem re-occurring	3	

30. Taking all those aspects into account, overall how satisfied or dissatisfied were you with the way your complaint was handled?
READ OUT

Very satisfied	1	32
Satisfied	2	32
Neither satisfied nor dissatisfied	3	31
Dissatisfied	4	31
Very dissatisfied	5	31
Don't know	99	32

31. How would you have changed the way that your complaint was dealt with?

		<i>Route</i>
Please specify.....	29	32
Don't know.....	99	32

32. Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water company?

Very satisfied	1	34
Satisfied	2	34
Neither satisfied nor dissatisfied	3	33
Dissatisfied	4	33
Very dissatisfied	5	33
Don't know	99	34

ASK ALL CODED AS 3, 4 OR 5 AT Q32. OTHERS GO TO Q34.

33. You weren't satisfied, please could you say why

		<i>Route</i>
Please specify.....	29	34
Don't know.....	99	34

Section D – Water on Tap

34. How satisfied are you with the following aspects of your water supply:

Scale: 1= very satisfied, 2= satisfied, 3= Neither satisfied nor dissatisfied, 4= dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.

The colour and appearance of your tap water
 Taste and smell of tap water
 Hardness/softness of your water
 The safety of your drinking water
 The reliability of your water supply
 Your water pressure

	<i>Route</i>
1	
2	
3	
4	
5	
6	

35. Taking all those aspects into account, overall how satisfied or dissatisfied are you with your water supply?

Very satisfied
 Satisfied
 Neither satisfied nor dissatisfied
 Dissatisfied
 Very dissatisfied
 Don't know

1	
2	
3	
4	
5	
99	

36. If you could make one single improvement to the overall service provided by your water company what would it be?

Please specify.....
 Don't know.....

	<i>Route</i>
29	
99	

37. How do you think that the service from your water company has changed over the past year?

READ OUT

Much better
 Better
 About the same
 Worse
 Much worse
 Don't know

	<i>Route</i>
1	38
2	38
3	39
4	38
5	38
6	39

38. Why do you think the service has been [better/worse]?

Please specify.....
 Don't know.....

	<i>Route</i>
29	39
99	39

39. How much do you agree or disagree with the following statement:
Scale 1=strongly agree, 2=agree, 3=neither agree nor disagree, 4=disagree, 5=strongly disagree, 99=don't know

READ OUT

I generally drink tap water and recognise that it is good for my health
 I recognise there is a need to minimise wasteful use of water
 I take action to minimise wasteful use of water

1	
2	
3	

40. Are you aware of any campaigns to use water wisely in the home and garden?

Yes(specify)
 No
 Don't know

	Route
	41
	42
	42

41. How were you made aware of campaigns to use water wisely?

READ OUT. MULTICODE.

Television
 Billboards
 Radio
 Leaflets
 Mail from water companies
 Newspapers/magazines
 Other (please specify)
 Don't know

	Route
1	
2	
3	42
4	
5	
6	
7	
99	

Section E – Flush and go

42. Which of the following do you think are acceptable to dispose of down the toilet or sink?
READ OUT. MULTICODE

Fats/cooking oils
 Bleach
 Nappies
 Sanitary towels
 Tampons
 Razors
 Cotton buds
 Condoms
 Motor oil
 None of these
 Don't know

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
99	

INTERVIEWER NOTE: If asked, none of these are acceptable

43. What do you think happens to the waste water that goes down the toilet/sink in your property?

DO NOT READ OUT. MULTICODE

- Cleaned at treatment sites
- Goes direct to the sea
- Goes direct to rivers
- Nothing
- Other (specify)
- Don't know

1	
2	
3	
4	
5	
99	

INTERVIEWER NOTE: If asked, waste water is cleaned at treatment sites, undergoing several stages of treatment before being released back into the environment

44. How satisfied are you with your sewerage company's management of the following aspects of their sewerage service:

Scale: 1= very satisfied, 2= satisfied, 3= Neither satisfied nor dissatisfied, 4= dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.

READ OUT

- Reducing smells from sewage treatment works
- Maintenance of sewerage pipes and treatment works
- Waste water is cleaned properly before being released back into the environment
- Minimising sewer flooding

1	
2	
3	
4	

45. Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service?

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied
- Don't know

1	
2	
3	
4	
5	
99	

46. If you could make one single improvement to the overall service provided by your sewerage company what would it be?

- Please specify.....
- Don't know.....

29	
99	

Section F – Speaking up for water consumers

47. Who would you contact if you had a problem with your water or sewerage services?
DO NOT READ OUT. SINGLE CODE

		<i>Route</i>
My water or sewerage company	1	
My local council	2	
My landlord	3	
Ofwat	4	
A consumer body/ the consumer council for water	5	
Other (specify)	6	
Don't know	99	

- 47a. Had you heard of the Consumer Council for Water before now?

Yes	1	48
No	2	49
Don't know	99	49

48. What, if anything, do you know about the Consumer Council for Water?
DO NOT READ OUT. MULTICODE

Water Company	1	
Consumer Body/provides a voice for consumers	2	
Does consumer research	3	
Part of Ofwat, the regulators	4	
A government agency	5	
Regulatory body for water sector	6	
Other (specify)	7	
Nothing/not sure	99	

READ OUT: The Consumer Council for Water was set up in October 2005 to represent customers of water and sewerage companies in England and Wales. The Consumer Council for Water provides a national voice for water and sewerage consumers. They want consumers to get (and be able to recognise that they are getting) high standards and good value for money in water and sewerage services, comparing well with the best of other service sectors.

ASK ALL

49. The Consumer Council for Water is interested in establishing how valuable its services are to the public. How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive?

READ OUT

Very important	1	
Fairly important	2	
Neither	3	
Fairly unimportant	4	
Not at all important	5	
Don't know	99	

ASK ALL

49b If you wanted to get in touch with the Consumer Council for Water what would be your preferred method of contact?
DO NOT READ OUT. SINGLE CODE

- Post/letter
- Email
- Telephone
- Via the CCWater website
- In person
- Other specify
- Don't know

1	
2	
3	
4	
5	
6	
99	

DO NOT ASK THOSE CODED 1 OR 99 AT Q48

50. Have you had reason to contact the Consumer Council for Water in the last year?

- Yes
- No
- Don't know

	Route
1	51
2	53
99	53

51. What did you last make contact about?
DO NOT READ OUT SINGLE CODE

- To ask for information
- To comment on a service received
- To make a complaint
- Billing enquiry
- Other specify
- Don't know

	Route
1	
2	
3	
4	52
5	
99	

52. Thinking about your contact with the Consumer Council for Water, overall how satisfied were you with:

Scale: 1= very satisfied, 2= satisfied, 3= Neither satisfied nor dissatisfied, 4= dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.

READ OUT

		Route
The ease of contacting someone who was able to help you	2	53
The quality of advice you receive	3	
The clarity of information provided	4	
The knowledge of the staff that you dealt with directly	5	
The politeness/courtesy of staff	6	
The willingness of staff to help	7	
The professionalism of staff	8	
The way that staff showed an understanding of the reason for your call	9	
The feeling that your call had been, or would be, resolved	10	
The way that Consumer Council for Water has kept you informed of progress with your enquiry (and / or) claim	11	

DO NOT ASK THOSE CODED 1 OR 99 AT Q48

53. How much do you agree or disagree with the following statements about the Consumer Council for Water?

Scale 1=strongly agree, 2=agree, 3=neither agree nor disagree, 4=disagree, 5=strongly disagree, 99=don't know

READ OUT

I have seen references to CCWater or CCWater press notices.	1	
I know how to contact CCWater if I have a problem or need advice.	2	
I rate CCWater as being effective in representing my views	3	

ASK ALL

54 What is your preferred source for information relating to your water and sewerage services?

DO NOT READ OUT. SINGLE CODE

Consumer Organisation mailings	1	
Face to face with Consumer Organisation staff	2	
Consumer Council for Water website	3	
Local press	4	
Inserts or leaflets with water & sewerage bills	5	
Radio / Television	6	
Environment Agency	7	
Ofwat	8	
Internet	9	
Word of mouth / businesses, etc.	10	
Citizen's Advice Bureaux	11	
Leaflets through the door	12	
Local authority	13	
Other (please specify)	14	
Don't know	99	

Thank you for sparing the time to take part

This survey was conducted on behalf of the Consumer Council for Water and is intended to allow them to better understand your requirements and help provide a better service to you, the consumer.

Should you wish to contact the Consumer Council for Water you can call their national enquiries line on [0845 039 2837](tel:08450392837) or visit their website at www.ccwater.org.uk

Should you want to contact the MRS (the Market Research Society) to verify that ORC International comply with the code of conduct, Liz Morley, the researcher for this project is on 020 7675 1069