CONSUMER COUNCIL FOR WATER

ANNUAL TRACKING SURVEY
2008

FINAL REPORT

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PREPARED FOR:	PREPARED BY:
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EXECUTIVE SUMMARY

BACKGROUND

Understanding the views and opinions of consumers is key to effectively delivering the business objectives of the Consumer Council for Water (CCWater) and for the organisation to continue to provide a strong consumer voice within the water and sewerage industry of England and Wales.

In 2006 CCWater undertook a baseline survey of consumer' views, and in 2007 and 2008 the survey has been repeated in order to track changes in consumers' views and opinions over time. In the 2008 survey only those who were solely or jointly responsible for paying their water and sewerage bills were surveyed, and overall, results of the 2008 survey are consistent with those in previous years but some changes are evident. Key findings from the 2008 survey are summarised below.

VALUE FOR MONEY

- Most respondents (86%) agree that the bills they receive from their water and sewerage supplier are clear and understandable.

- Over seven in ten respondents (72%) say that they are satisfied with the value for money from the water services in their area.

- The main reason that customers are dissatisfied with the value for money of their water and/or sewerage services is because of issues relating to price rather than service quality.

- Results for value for money from sewerage services are slightly better than the results for satisfaction with water services, with 76% saying that they are satisfied.

- Customers perceive their water and sewerage charges to be better value for money than their energy charges. This represents a shift in opinion over the last year as in 2007 more were satisfied with the value for money from their energy supplier.

- Nearly two thirds (63%) agree that the water and sewerage charges that they pay are *fair*.

- Three quarters (74%) agree that the water and sewerage charges that they pay are *affordable.*

- For the majority of respondents (82%) it is equally important for their bills to be affordable and for their company to conducts its business ethically.

- As in previous years, customers in the South West continue to be far less positive than others with regards to a number of aspects relating to water and sewerage services, especially value for money, reflecting the higher prices paid by these customers.

CONSUMER RIGHTS AND RESPONSIBILITIES

- The majority of respondents (87%) are aware that they can pay in instalments, and 78% say that they are likely to contact their water company if they have a problem paying their bill.

- Overall, 37% of respondents say that they have a water meter fitted, and encouragingly, those who say that they have water meters fitted are the ones who are most likely to benefit from having a meter i.e. the elderly, and one person households where they are more likely to use less water and keep costs down than others.

- As in 2007 three in five (59%) unmetered respondents are aware that they can have a water meter fitted free of charge.

- Awareness of the WaterSure Tariff has fallen over the last year from 12% in 2007 (when it was called the Vulnerable Groups Tariff) to 7% in 2008.

- Awareness of the services available for elderly and/or disabled customers has also fallen from 29% in 2007 to 25% in 2008.

- Two in five (40%) claim to be aware that they may be entitled to compensation if their water or sewerage company fails to meet certain customer service standards.

- Nearly one in five respondents (18%) say that they have contacted their water company to make an enquiry in the past 12 months; satisfaction with all aspects of contact and complaint handling has improved over the past year (overall 81% were satisfied with their contact in 2008 compared with 71% in 2007).

WATER ON TAP

- There are high levels of satisfaction with all aspects of water supply and satisfaction has increased over the past year. Customers are most satisfied with the reliability of their water supply (98%), and least satisfied with the hardness/softness of their water (74%).

- Very few respondents (2%) think that their water service has got worse over the past year.

- The majority of adults (86%) think that tap water is at least as good for them as bottled water, and the proportion who think that bottled water is better for them than tap water has fallen from 21% in 2007 to 14% in 2008.

- There has also been an increase over the past year in the number of respondents who say that they usually drink tap rather than bottled water (82% in 2008 compared with 78% in 2007).

- Seven in ten respondents (69%) claim to have taken specific measures over the past 12 months to reduce their use of water.

- Consistent with the 2007 results just over half (55%) claim to have been made aware of campaigns to use water wisely in the past 12 months.

CLEANING UP

- There is still some confusion amongst a significant minority of customers as to what is acceptable to dispose of down the toilet, sink or drain with 17% wrongly thinking that it is acceptable to dispose of tampons, and 11% thinking it is acceptable to dispose of medicines down the toilet, sink or drain.

- Nearly three-quarters of respondents (73%) are aware that their waste water is cleaned at treatment sites, with some still thinking that it is released untreated directly into rivers or the sea.

- Overall satisfaction with sewerage services has improved slightly over the last two years, with a total of 90% saying that they are satisfied.

- Satisfaction with specific elements of sewerage services (such as reducing smells from treatment sites and minimising sewer flooding) has also improved slightly over the past year.

COMPARISONS WITH OTHER UTILITIES

- Customers are more likely to think that their water/sewerage company cares about the service it provides than they are to think that their energy company does (70% compared with 54%).

- They are also significantly more likely to say that they trust their water/sewerage company more than their energy company.

- Overall satisfaction with service provided is higher for water and sewerage companies (90% satisfied) than telephone landline companies (88%), energy companies (81%) and respondents' local councils (72%).

SPEAKING UP FOR WATER CONSUMERS

- As in previous years the majority of respondents (86%) say that they would contact their water or sewerage company if they had a problem in relation to their water or sewerage services.

- Spontaneous awareness of CCWater is still very low with just 0.3% aware that CCWater is the consumer body for the water industry and three in ten respondents (29%) wrongly thinking that the consumer body is Ofwat.

- When probed, a further 21% of respondents said that they had heard of CCWater before taking part in the survey (representing a slight increase from 18% in 2007).

- Nearly all customers think it is important to have a consumer body representing their interests about the water and sewerage services they receive (22% think that it is absolutely essential, 51% think it is very important, and 21% think that it is fairly important).

- A total of four respondents say that they had had reason to contact CCWater in the last year and all were very satisfied with every aspect of their contact.

Simon Driver (Research Executive)
Stephen Link (Director)

February 2009

1 INTRODUCTION

The Consumer Council for Water (CCWater) is the water industry watchdog, set up to represent and provide a strong national voice for consumers of water and sewerage companies in England and Wales. CCWater operates through four committees in England and a committee for Wales.

Understanding the views and opinions of consumers is key to effectively delivering the business objectives of CCWater and for the organisation to continue to provide a strong consumer voice within the industry.

In order to be successful in its goals, CCWater needs to represent all water consumers and have an understanding of how customers view water supply and sewage removal and treatment; the companies that provide these services; and the areas of policy/activity within the market.

In 2006 CCWater undertook a baseline survey of consumer views. In both 2007 and 2008 FDS International have continued this survey, building on the previous results and tracking changes in the views of water customers over time.

RESEARCH AIMS

This tracking research is designed to identify customer views on their water and sewerage services in order to provide an independent, reliable and justifiable platform on which CCWater can base future policy and activity.

The main objectives of this research are to:-

- **Understand customers' views about their water and sewerage supply**
- **Benchmark customers' views about their water and sewerage supply against their views of other utilities**
- **Measure changes in opinion over time**
- **Explore customer perceptions of CCWater's impact and performance on service provision**
- **Help CCWater develop an effective communication strategy.**

APPROACH

To be consistent with the previous waves of consumer research a quantitative methodology was undertaken, using telephone interviewing to survey a random cross section of households across England and Wales.

FIELDWORK

The study was carried out using CATI (Computer Assisted Telephone Interviewing) from FDS's Telephone Centres.

In total 2,000 interviews were achieved across England and Wales. Interviewing took place between November and December 2008.

SAMPLE

A random digit dialling (RDD) sample of residential telephone numbers across England and Wales was purchased from an FDS approved supplier, UK Changes.

Quotas were set during the interviewing on region and age of respondents. The sample was stratified by water and sewerage company region to ensure robust numbers were achieved per region. That is, an equal number of interviews were achieved for each water region to enable sub-group analysis within each, rather than setting targets proportionate to the size of their customer base. We set a quota of 200 respondents for each of the ten water and sewerage company regions. Respondents were screened to ensure that we only interviewed householders who were wholly or jointly responsible for paying the water and sewerage bill.

As detailed above a stratified sampling approach was used and RDD sample was purchased on a 10:1 basis (10 leads to achieve 1 interview). The sample was also designed to be representative of households across England and Wales, rather than individuals.

QUESTIONNAIRE

In order to understand how customers' views and opinions have developed over time, it was important to maintain a high degree of consistency with the questionnaires used in 2006 and 2007. Therefore the 2008 questionnaire is largely based on the previous surveys undertaken.

The questionnaire was however further developed in liaison with CCWater, and additional questions were added, including a number of questions allowing comparisons to be made with other utilities.

As in previous years the questionnaire focussed on the following five key themes:-

- value for money
- consumer rights and responsibilities
- water on tap
- cleaning up
- speaking up for water consumers.

The interviews lasted for around 20 minutes, and a copy of the questionnaire is included in the appendices.

DATA PROCESSING AND COMPUTER TABLES

Weighting has been applied to the data to ensure they are representative of household water customers. With a stratified sample (as explained under the previous sample section), to enable analysis by water region, weighting was required to correct this deliberate unequal distribution of customers. Weighting was also applied for social grade and age to ensure findings are representative of households in England and Wales, and to address any minor imbalance in sample profiles. A sample profile is included in the Appendix which shows the actual number of interviews achieved against the weighted data.

Computer tables have been provided to CCWater with each question analysed by two pages of sub-groups agreed with CCWater.

INTERPRETATION OF DATA

It should be remembered results are based on a national sample of households – not a census of all households. This means all data are subject to sampling tolerances.

The table below shows the statistical reliability of results based on a base size of 2000 (the total sample) and 200 (the number of interviews achieved per region).

Overall statistical reliability			
Base size	**Approximate sampling tolerances applicable to percentages at or near these levels**		
	10% or 90%	***30% or 70%***	***50%***
2,000 *(total sample)*	±1%	±2%	±2%
200 *(200 interviews per region)*	±4%	±6%	±7%

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of ‘don’t know’ categories, or multiple answers. Throughout the report, an asterisk (*) denotes any value less than half a percent but greater than zero.

Throughout the report, we highlight differences between sub-groups of respondents and between the 2006, 2007 and 2008 results where they are statistically significant.

2 VALUE FOR MONEY

In this section we explore customers' views on a number of issues relating to value for money. This includes views on billing, value for money from a range of different services, and affordability and fairness of water and sewerage bills.

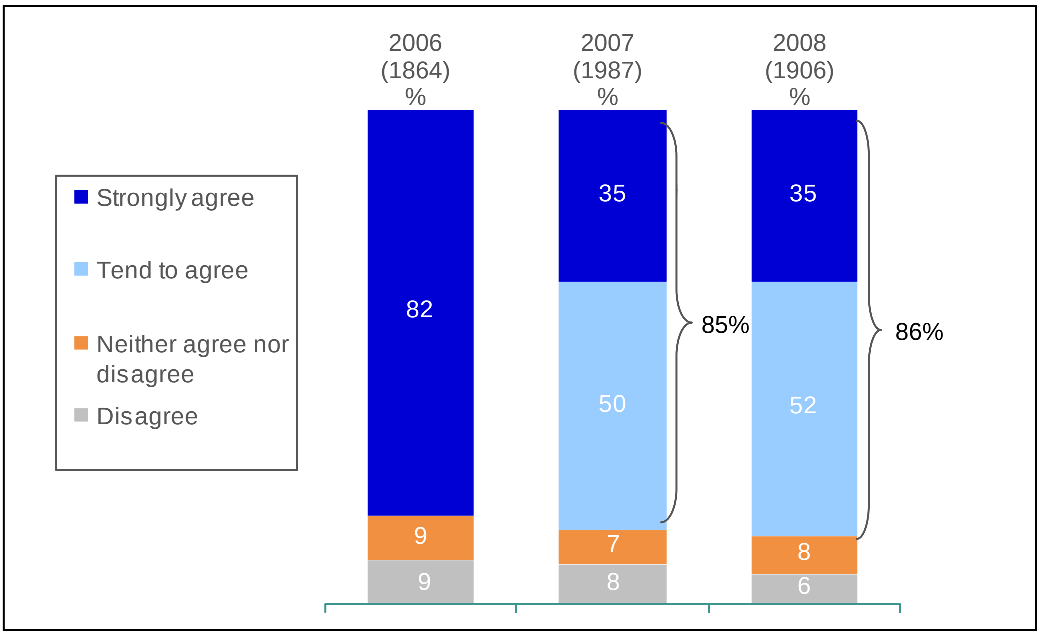
Summary

- The majority of respondents still feel their bills are clear and understandable.
- Perceived value for money from water and sewerage services is consistent with previous the years results
  - as in previous years, respondents in the South West are least satisfied.
- Respondents are more satisfied with value for money from water and sewerage companies than with value for money from energy suppliers.
- A quarter of customers feel that the charges they pay are unfair.
- One in five say that their bills are not affordable.

CLARITY OF WATER AND SEWERAGE BILLS

As the following chart shows, the majority of respondents (86%) agree that the bills they receive from their water and sewerage supplier are clear and understandable (35% strongly agree, 52% tend to agree, these figures adding to 86% due to rounding). This result is consistent with 2007 when 85% agreed that the bills they receive from their water and sewerage supplier are clear and understandable.

Chart 2.1: Agreement that water and sewerage bills are clear and understandable
(Base: All excluding don't know)



As in 2007 customers in the Wessex region are the most likely to agree that their bills are clear and understandable (94%).

Customers in the older age groups are also more likely to say that their bills are clear and understandable (80% of those aged 18-34 agree that their bills are clear and understandable compared with 91% of those aged 75+).

Those who are overall satisfied with their water supply are more likely than those who are dissatisfied to say that their bills are clear and understandable (87% compared with 54%), and customers who are satisfied with their sewerage supply are also more likely to agree that their bills are clear and understandable (87% compared with 66%).

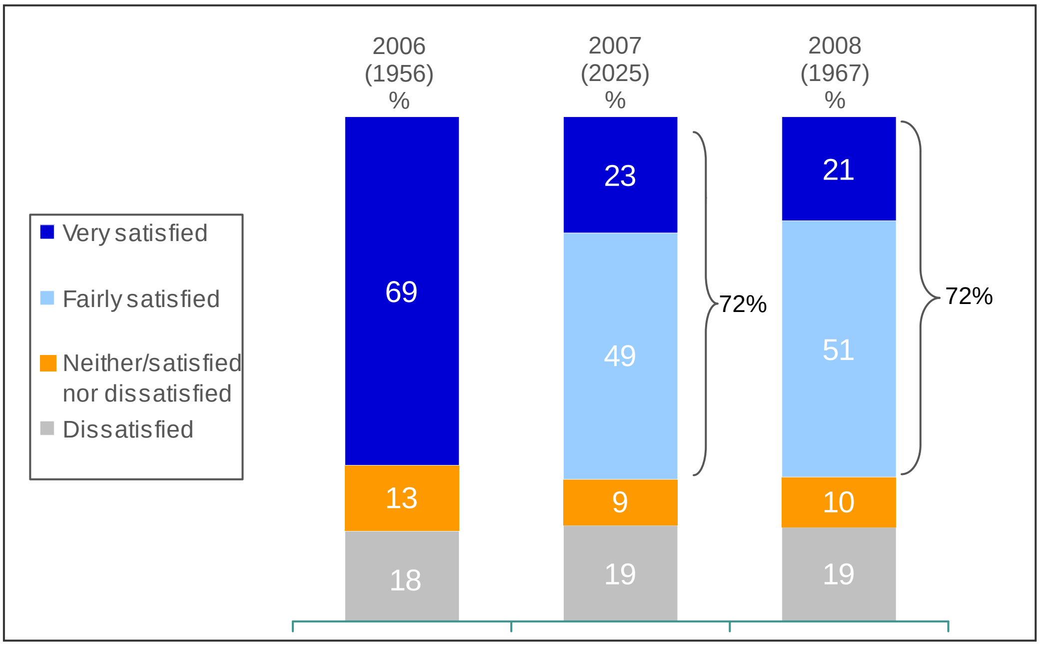
Those who say that they are satisfied with the value for money from their water/sewerage services are also significantly more likely than those dissatisfied to say that their bills are clear and understandable (92% compared with 73%).

This suggests that there is a halo effect with overall satisfaction with water/sewerage supply and value for money influencing specific elements. Therefore some of those critical of bill clarity may have no specific complaints in this area but be generally dissatisfied with their water/sewerage supply and the value for money.

VALUE FOR MONEY FROM WATER SERVICES

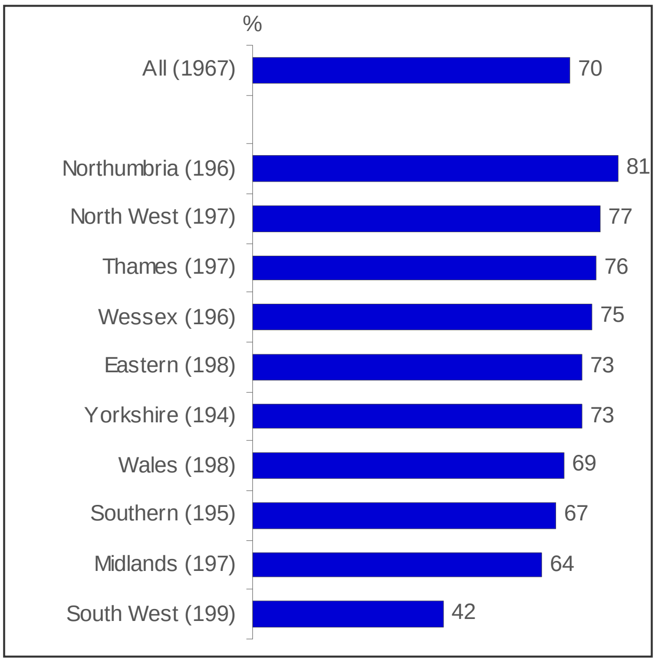
Just over seven in ten (72%) respondents say that they are satisfied with the value for money from the water services in their area. As the chart below shows these results are in line with those in 2006 and 2007.

Chart 2.2: Satisfaction with value for money from water services
(Base: All excluding don't know)



When analysed by region, there are clear differences in perceived value for money from water services. Respondents in the South West are significantly less likely to be satisfied with the value for money from their water services (42% are satisfied, 55% dissatisfied).

Chart 2.3: Satisfaction with value for money from water services by region
(Base: All excluding don't know)



As in 2006 and 2007 dissatisfaction among customers in the South West is a marked feature of the survey and a theme that occurs on other questions. This is likely to be due to the fact that customers in the South West have the highest average bills for water and sewerage services in England and Wales[1]. Respondents in Northumbria are the most likely to say that they are satisfied with the value for money from their water services (81% satisfied, 11% dissatisfied).

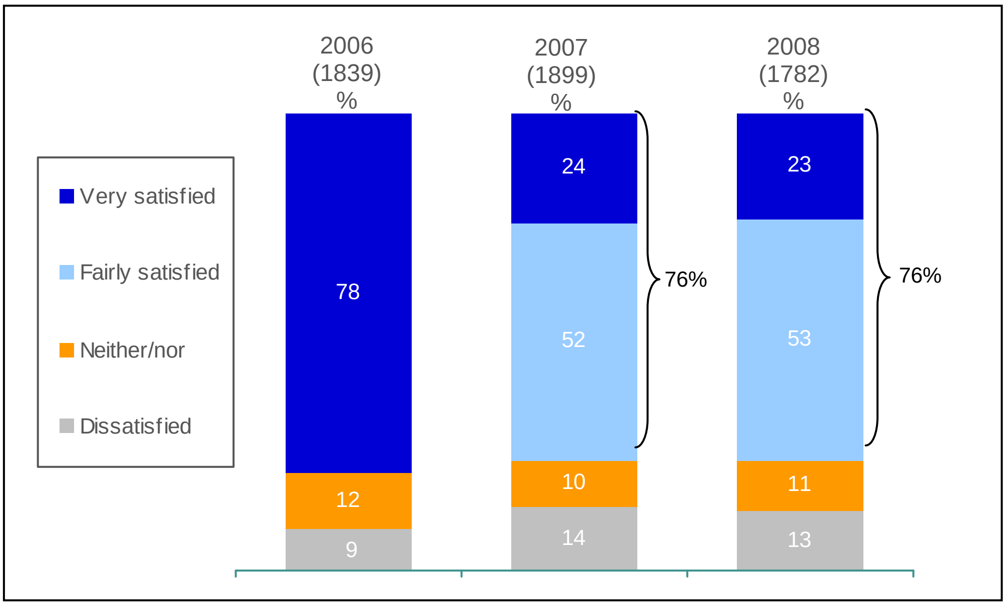
Those who are overall satisfied with their water supply are more likely than those who are dissatisfied to say that they are satisfied with the value for money from their water services (74% compared with 27%), and customers who are satisfied with their sewerage supply are also more likely to be satisfied with the value for money (74% compared with 41%).

Respondents with a disability or long-term health condition are more likely than those without to be *dissatisfied* with the value for money from their water services (24% compared with 18%).

VALUE FOR MONEY FROM SEWERAGE SERVICES

Results for value for money from sewerage services are slightly better than the results of satisfaction with water services, with 76% saying that they are satisfied. This result is consistent with the 2007 findings as illustrated in the chart below.

Chart 2.4: Satisfaction with value for money from sewerage services
(Base: All excluding don't know/NA)



Regional trends for satisfaction with sewerage services are the same as for satisfaction with water services i.e. respondents in the South West are significantly less likely to be satisfied with the value for money from their sewerage services (47% satisfied) and respondents in Northumbria are the most likely to be satisfied (82%).

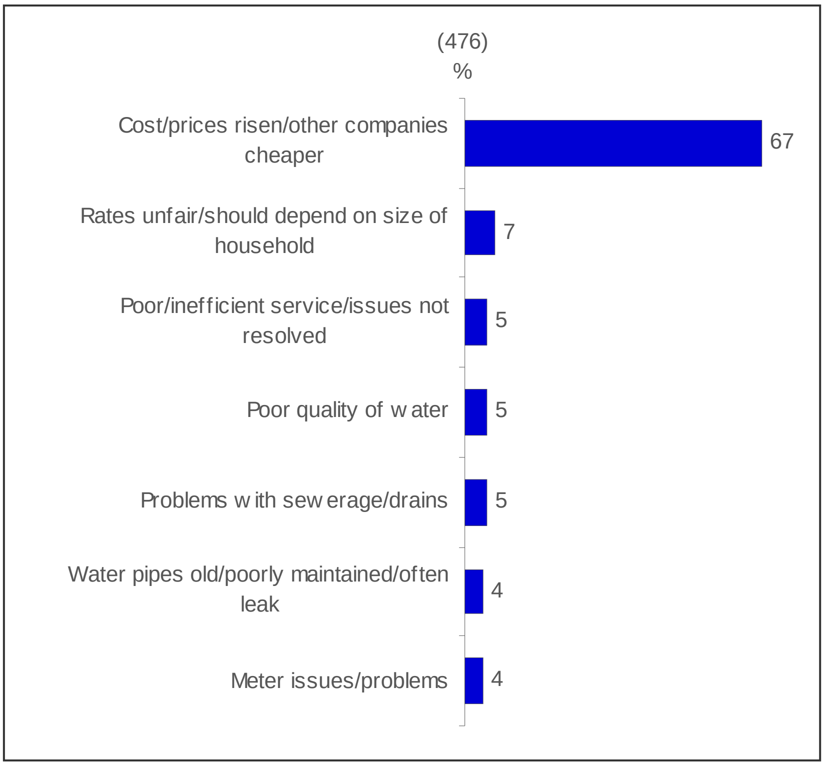
[1] OFWAT - Water and sewerage charges 2007-08 report, May 2007

Similarly, respondents who are overall satisfied with their water supply are also more likely to say that they are satisfied with the value for money from their sewerage services (77% of those satisfied with their water supply compared with 38% of those dissatisfied), and customers who are overall satisfied with their sewerage services are also more likely to be satisfied with the value for money (79% of those satisfied with their sewerage services compared with 49% of those dissatisfied).

The age of customers also has an impact on satisfaction with value for money from sewerage services. Those aged 75+ are the most likely to be satisfied with the value for money from sewerage services (83% of those aged 75+ are satisfied compared with 73% of those aged 18-34).

The main reason that customers are dissatisfied with the value for money from their water and/or sewerage supplier is because of issues relating to price. Relatively few relate their view of value for money to service quality, or problems encountered.

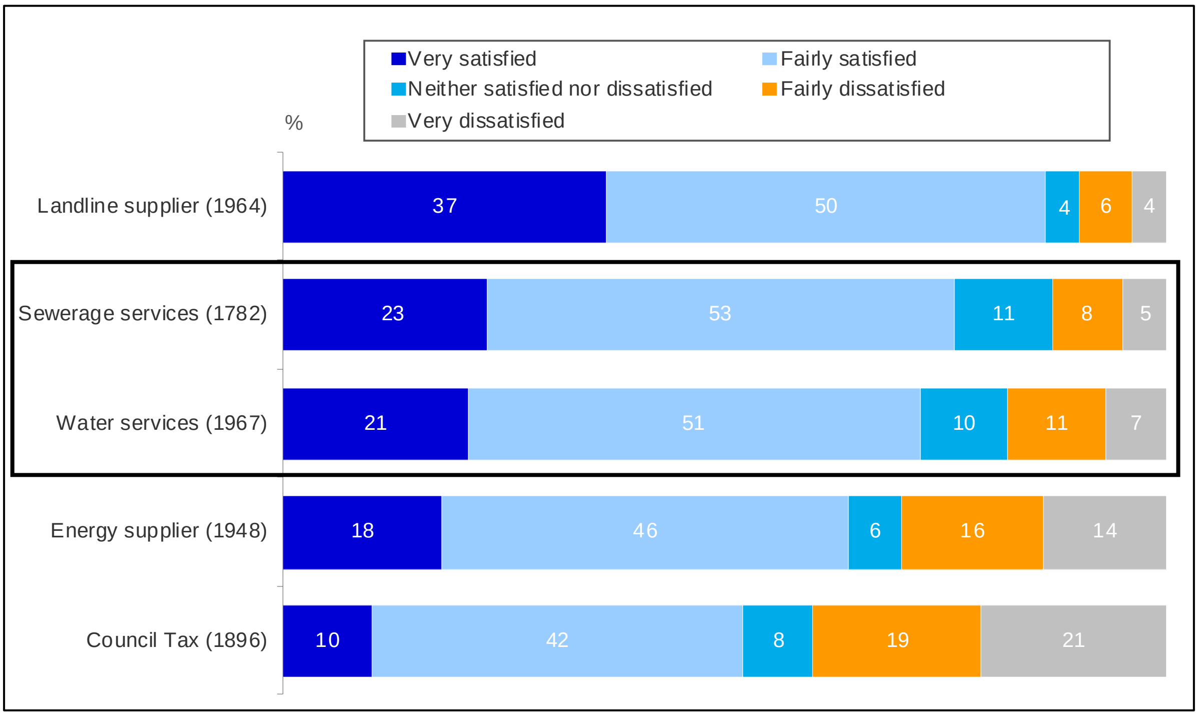
Chart 2.5 Reasons sewerage/water services are not good value for money
(Base: All dissatisfied with value for money of water and/or sewerage supplies)



COMPARATIVE VALUE FOR MONEY FROM DIFFERENT SERVICES

In the 2007 survey new questions were introduced to examine customers' perceptions of value for money for a number of different services. In the 2008 survey we have repeated these questions to allow us to compare perceived value for money for water and sewerage services against other services and see how this has changed over the past year.

Chart 2.6: Satisfaction with value for money from various services
(Base: All respondents excluding DK/NA)



Satisfaction with value for money is highest for landline telephone suppliers (87%), followed by sewerage services (76%), and water services (72%). As in 2007 council tax is perceived to be the worst value for money (only 52% say that they are satisfied with the value for money from their council tax).

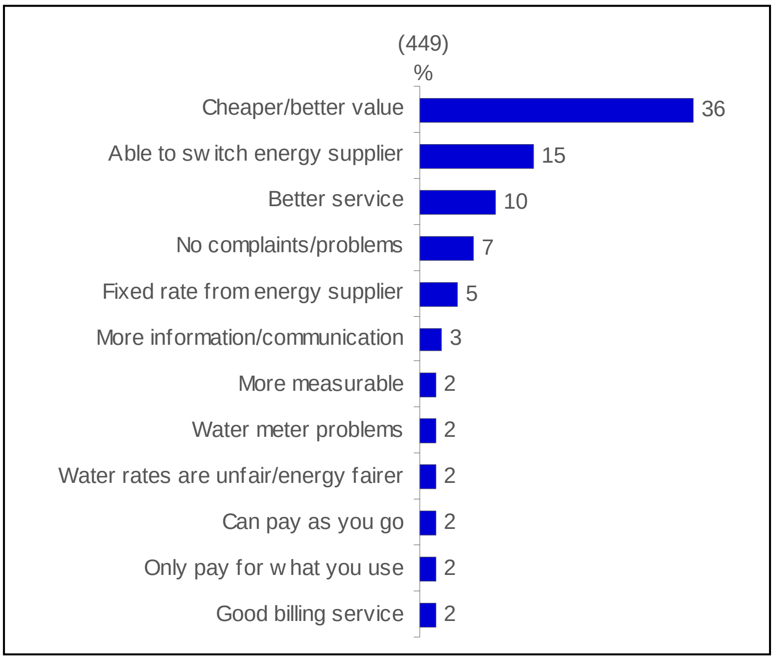
In 2007 more customers were satisfied with the value for money from their energy supplier than their water and sewerage services; however as the chart above illustrates satisfaction with value for money from energy suppliers has now fallen well below the satisfaction levels for water and sewerage services (65% say that they are satisfied with the value for money from their energy company in 2008). It is likely that this fall in perceived value for money from energy companies is due to the industry wide price rises implemented in Spring 2008.

Despite energy prices being higher on average than water charges, 22% of customers do still feel that they get better value for money from their energy supplier than their water supplier (this figure increases to 46% in the South West which has the highest average water and sewerage bill in England and Wales).

Those who live in social rented accommodation (29%) and single parents (30%) are also more likely than average to say that their energy bills are better value for money than their water bills.

The main reason why people perceive their energy supplier to be better value for money is because it is cheaper or better value (36%). One in seven (15%) say that they get better value for money because they are able to switch their energy suppliers, and there are also a number of reasons related to quality of service and availability of different tariffs.

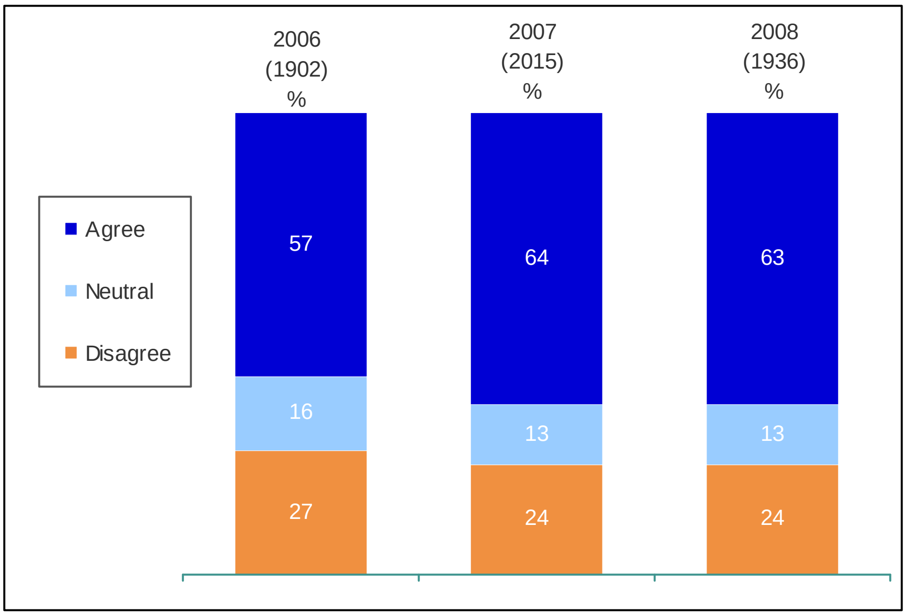
Chart 2.7: Reasons customers think that their energy supplier represents better value for money than their water and/or sewerage service provider
(Base: All who think that they get better value from their energy supplier than water supplier)



FAIRNESS OF WATER AND SEWERAGE CHARGES

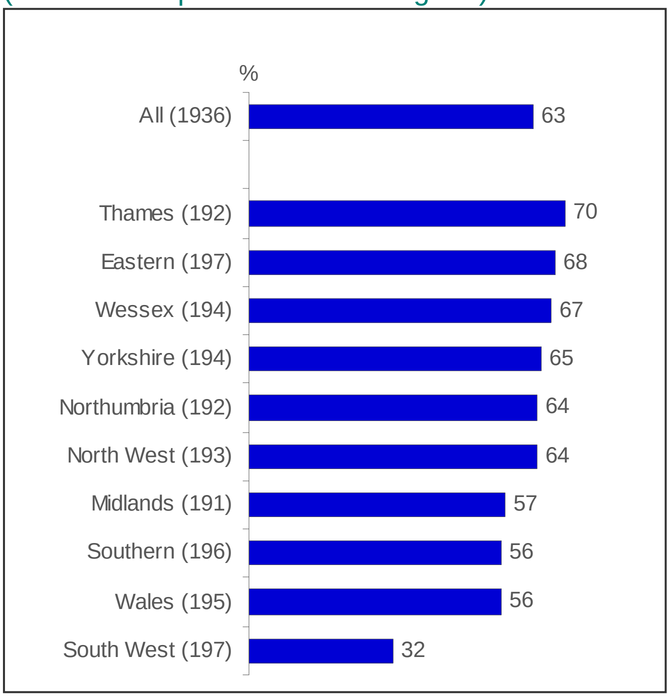
Perceptions of fairness of water charges have not changed over the past year with 63% agreeing that the water and sewerage charges that they pay are fair, (64% agreed that the charges they paid were fair in 2007).

Chart 2.8: How much do you agree or disagree that the water and sewerage charges that you pay are fair?
(Base: All respondents excluding DK)



Respondents in the South West where bills are generally higher are significantly less likely to agree that the charges they pay are fair (32% agree). Those in the Thames region are most likely to agree that the charges they pay are fair (70%).

Chart 2.9: Respondents agreeing that the prices they pay are fair by region
(Base: All respondents excluding DK)

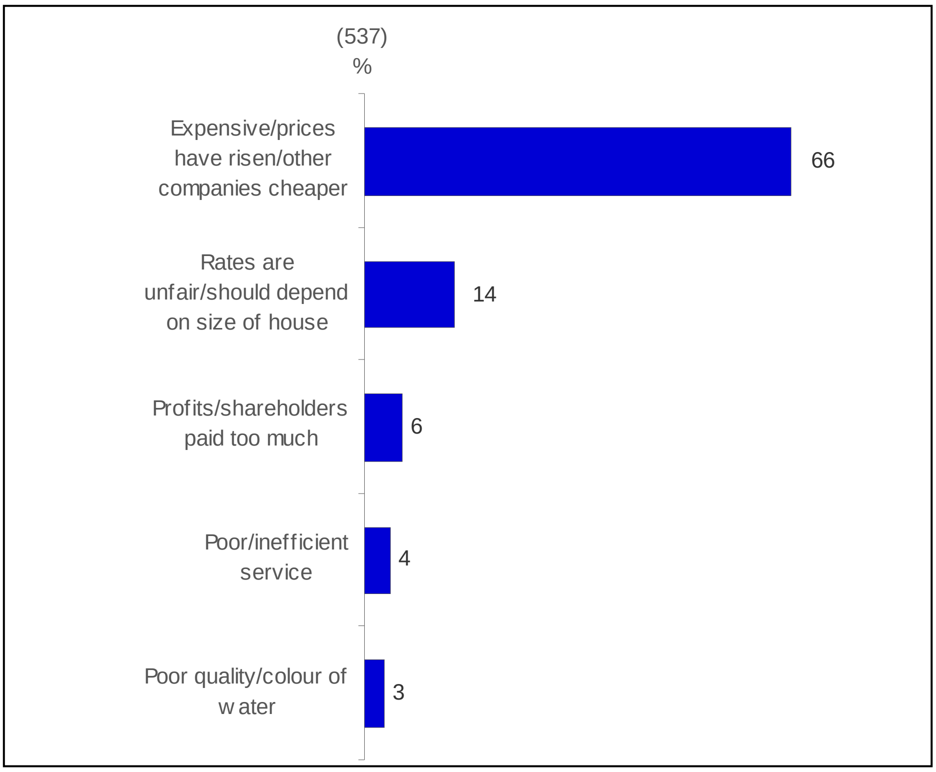


Households with a water meter are more likely than those without to say that the charges they pay are fair (68% compared with 61%). It is encouraging that having a water meter appears to enhance perceptions of fairness.

Respondents with a disability or long-term health condition are less likely than those without to say that the charges they pay are fair (56% compared with 64%).

As the following chart illustrates, people tend to link perceived unfairness of charges to cost rather than service quality.

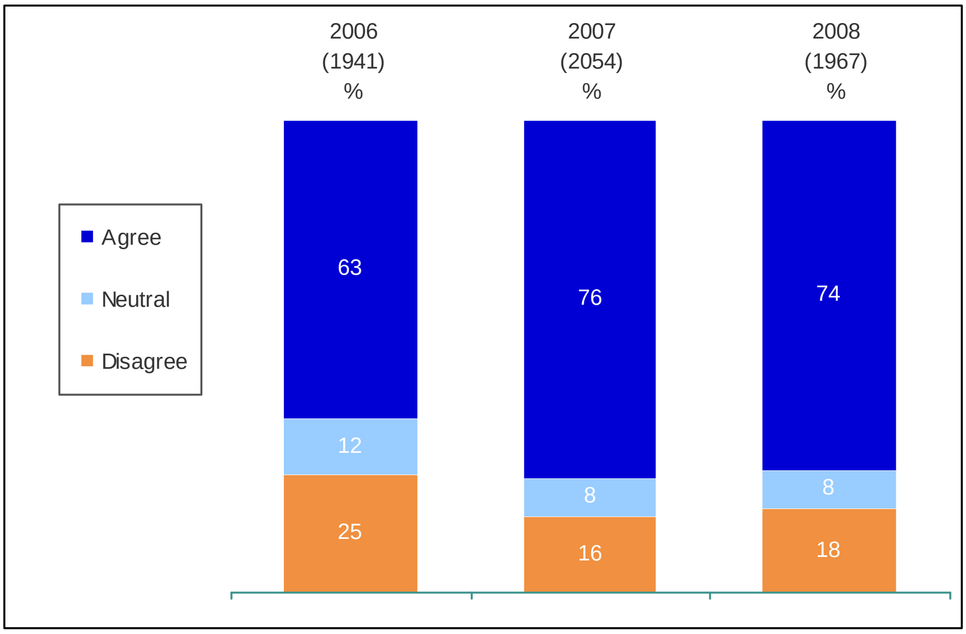
Chart 2.10: Reasons water and sewerage charges are unfair
(Base: All disagreeing that water and sewerage charges are fair)



AFFORDABILITY OF WATER AND SEWERAGE CHARGES

As in previous years respondents are significantly more likely to agree that their bills are affordable than they are to agree that they are fair (63% agree that the bills they pay are *fair* compared with 74% who agree that the water and sewerage charges that they pay are *affordable)*.

Chart 2.11: How much do you agree or disagree that the water and sewerage charges that you pay are affordable to you?
(Base: All respondents excluding DK)



Consistent with other results, respondents in the South West are significantly less likely to agree that the charges they pay are affordable (48%). Respondents in the Thames region are the most likely to agree that the charges they pay are affordable (81%).

Respondents of lower social grade are less likely than more affluent respondents to agree that their charges are affordable to them (69% of DE's compared with 79% of AB's agree). Single parents and those with a disability or long-term health condition are also less likely to agree that the charges that they pay are affordable (64% and 59% respectively agree that the charge they pay are affordable to them).

A new question was added to the survey in 2008 to examine customers' views on the relative importance of bills being affordable versus the importance of water and sewerage companies conducting their business ethically. One in ten respondents (10%) say that their bill being affordable is most important to them, compared with 8% who say that their water and/or sewerage company conducting their business ethically is most important. The majority of respondents (82%) say that they are both equally as important to them.

3 CONSUMER RIGHTS AND RESPONSIBILITIES

In this section we explore customers' views on a number of issues relating to the rights and responsibilities of water consumers. This includes awareness of billing options, the number of customers on water meters, awareness and take-up of special tariffs, responsibility for water pipes, awareness of consumer rights, and issues relating to contacting the water companies.

Summary

- Nine in ten respondents are aware that they can pay their bill in instalments.
- A quarter of respondents do not have a water meter AND are not aware they could have one fitted free of charge
  - younger customers are significantly less likely than older customers to ask to have a water meter fitted.
- Awareness of WaterSure, (the social tariff for customers on low incomes but who need to use more than water than average) and services for elderly and/or disabled customers has fallen over the past year.
- Two in five customers are aware that under certain circumstances they may be entitled to compensation for failures to meet specified levels of service.
- Satisfaction with contact with water and sewerage companies and satisfaction with complaint handling has improved on all measures over the past year.

BILLING OPTIONS

Nine in ten respondents (89%) are aware that they can pay their water and sewerage bill in instalments e.g. monthly, fortnightly or weekly. This result is similar to 2007 when 87% were aware.

Awareness that customers can pay their bills in instalments is lowest among the youngest and oldest age groups. Amongst younger respondents (18-34) 86% are aware they can pay in instalments, and amongst those aged 75 or over 84% are aware. This compares with 91% of those in the middle age brackets (35-74).

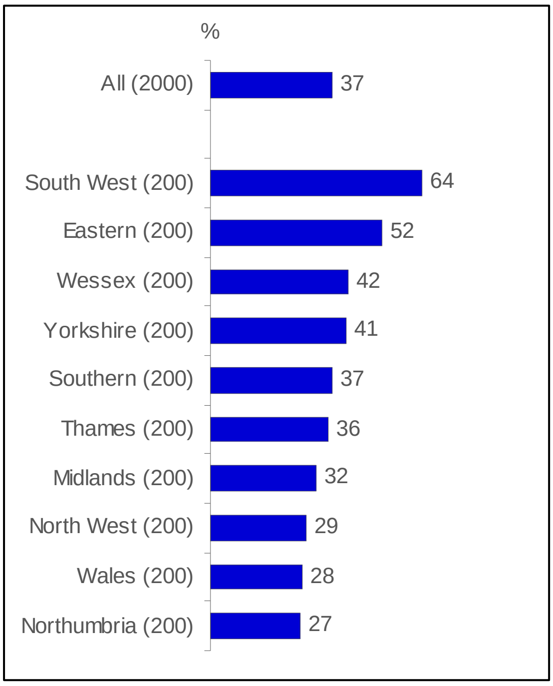
Overall 78% of respondents say that they would be likely to contact their water company if they were worried about paying their bill, and this figure was higher still (85%) among those renting their property privately.

Customers who were satisfied with their previous contact with their water company were more likely to be prepared to contact them if they were worried about paying their bill (86% of those satisfied with previous contact compared with 71% of those dissatisfied).

WATER METERS

Overall 37% of respondents say that they have a water meter fitted, and as in previous years, penetration of water meters continues to vary greatly by region.

Chart 3.1: Proportion of households with a water meter fitted
(Base: All respondents)



The incidence of water meters varies in line with the characteristics of the respondent's household, with those one might expect to have low water consumption more likely to have meters than larger families. Over half (52%) of one person households have a meter fitted compared with 40% of two adult households, 30% of one parent families, and 27 % of two parent families.

As in previous years, older respondents are more likely to have a water meter than those who are younger. 55% of those aged 75+ and 44% of 61-75 year olds have a meter fitted, compared with just 33% of under 60's.

These results are encouraging, as the respondents who say that they have water meters fitted, are the ones who are most likely to benefit from having a meter i.e. the elderly, and one person households where they are more likely to use less water and keep costs down than others.

Among respondents who did not have a water meter 59% were aware that they could have one fitted free of charge if they wanted. Awareness that water meters can be fitted free of charge has remained at the same level over the past year with 61% aware in 2007 (just 50% were aware in 2006).

Of the total sample, 25% did not have a water meter AND were NOT aware they could have one fitted free of charge.

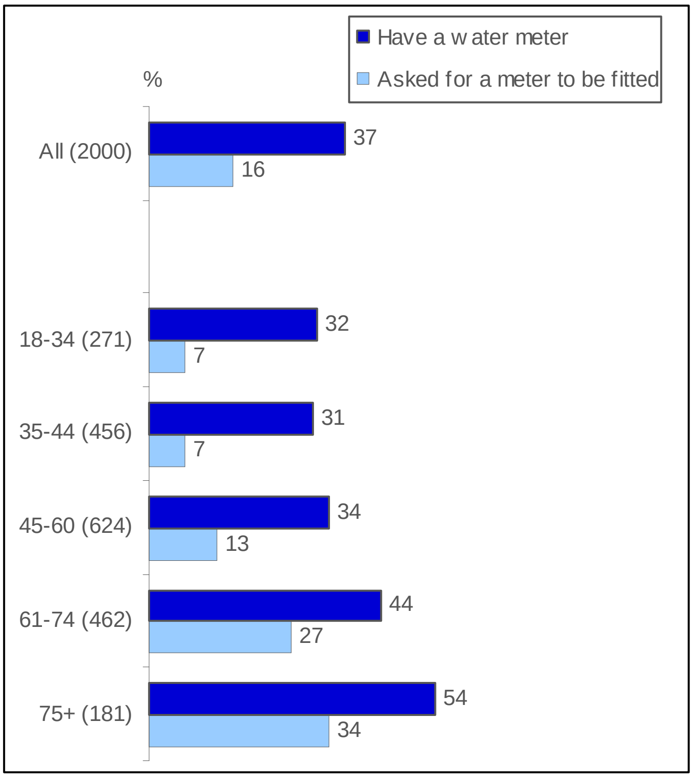
Awareness that a meter can be fitted free of charge if requested is higher among owner occupiers than tenants (61% of owner occupiers, compared with 52% of private renters, and 49% of social renters are aware).

Among households who have a water meter 50% say that it was already installed when they moved into their home, 43% asked for it to be fitted and 7% had to have a meter fitted.

Those living in single person households were much more likely to have asked for a meter to be fitted than those living in multi-person households.

As the following chart illustrates, younger respondents are far less likely to have asked for a water meter to be fitted.

Chart 3.2: Proportion of all customers with water meters by age
(Base: All respondents)



If a customer requests to have a water meter fitted, they have 12 months to decide whether or not they want to keep it. If they don't, they can go back to the original water rate charge for the property at no cost. A quarter (26%) of unmetered customers surveyed (fewer than half of those aware that they could have a new meter fitted free of charge) claimed to be aware that they could have it on a 12 month trial period.

WATERSURE TARIFF

People were asked *"are you aware of or are you currently on the WaterSure tariff? This was introduced to help people in low income groups who need to use a lot of water."*

The majority of respondents (93%) are not aware of the WaterSure tariff. This includes 77% who say that they do not need to be on the tariff, and 14% who say that they would like to know more, and 3%, who are unsure.

All water companies have recently adopted the name 'WaterSure' for their tariffs for low income groups who need to use a lot of water. This could explain the fall in claimed awareness from 12% aware in 2007 when it was called the Vulnerable Groups Tariff (or other company specific brand name) to 7% in 2008 after the name change.

Table 3.3: Awareness of WaterSure tariff
(Base: All respondents)

	Vulnerable Groups tariff 2007 (2088) %	**WaterSure Tariff 2008 (2000) %**
AWARE	**12**	**7**
Subscribed	1	1
Aware but no need to subscribe	10	6
NOT AWARE	**87**	**91**
No, but would like to know more	11	14
No, but do not need it	76	77

There are a number of significant differences in the characteristics of those who would like to know more about the tariff:-

- Respondents from lower social grades are more likely than others to say that they would like to know more (20% of unaware DE's compared with 8% of unaware AB's).

- Consistent with social grade differences, respondents who are in rented houses are more likely than owner occupiers to say that they would like to know more (22% of renters compared with 12% of owner occupiers).

- Lone parents are also more likely to say that they would want to know more (28% of lone parents compared with 12% of other households).

- Respondents with a disability or long-term health condition are also more likely to say that they would like to know more about the tariff (23% of respondents with a disability or long-term health condition compared with 12% of those who do not).

There certainly appears to be scope to increase awareness among those most likely to be eligible for the WaterSure tariff or those who are likely to know others who might be eligible.

SERVICES FOR ELDERLY AND/OR DISABLED CONSUMERS

Respondents were asked *"Are you aware of your water 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 clients from the company are genuine, or customers on dialysis who need constant availability of supply?"*

A quarter (25%) of respondents say that they are aware of their water company's services available for elderly and/or disabled customers. This is slightly lower awareness than 2007 when 29% said that they were aware of the services. Included in the 75% unaware are 10% of all respondents who would like to know more.

Table 3.4: Awareness of services for elderly and/or disabled consumers
(Base: All respondents)

	2007 (2088) %	2008 (2000) %
AWARE	**29**	**25**
Subscribed	1	1
Aware but no need to subscribe	28	24
NOT AWARE	**71**	**75**
No, but would like to know more	10	10
No, but do not need it	61	65

Awareness was highest among older respondents (37% among those aged 75 or over, 30% among those aged 61-74 and 22% among those 60 and under).

As in previous years, elderly customers are the most likely to say that they would like to know more about these services (18% of those 61+, compared with 6% of those aged 60 and under would like to know more).

Respondents with a disability or long-term health condition are also more likely to say that they would like to know more about the services (25% of respondents with a disability or long-term health condition compared with 7% of those without).

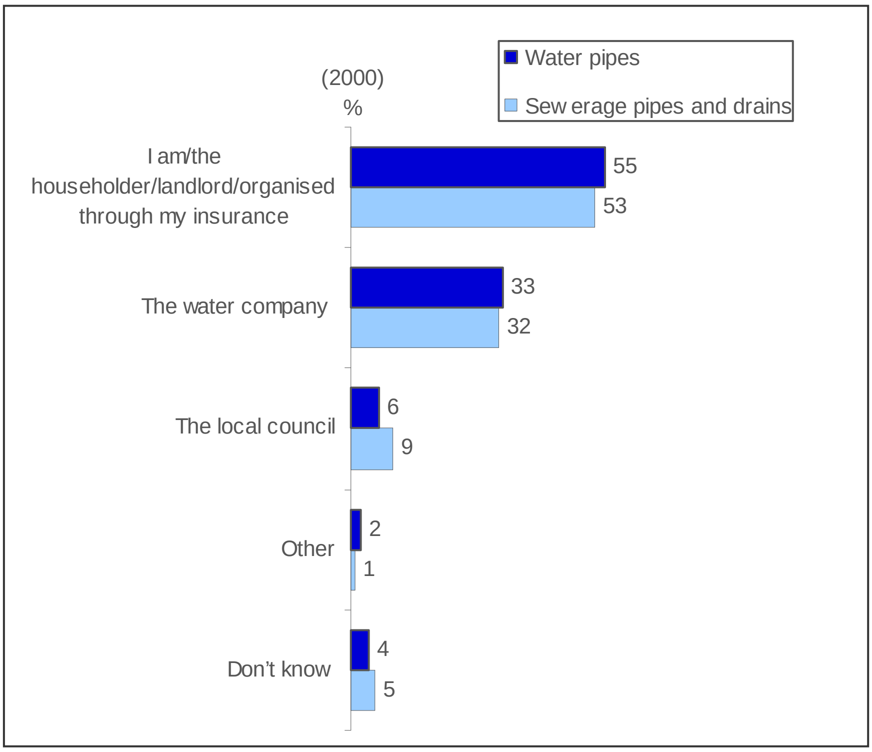
MAINTENANCE OF WATER AND SEWERAGE PIPES

For council tenants it is the local council who is responsible for maintaining the water pipes at the property. Homeowners are 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). Homeowners are also responsible for the maintenance of sewerage pipes and drains at their home up to the point they meet the main sewer.

The following chart illustrates who respondents believe is responsible for the maintenance of the water pipes and sewerage pipes and drains at their property. Over half (55%) say that they themselves are responsible for the water pipes at their property, and a similar proportion (53%) say that they are responsible for the sewerage pipes and drains at their property.

A relatively high proportion of respondents mistakenly guess or believe that the water company is responsible for the maintenance of the water pipes and sewerage pipes and drains at their property and there appears to be increased confusion over water companies' responsibilities over the past year. A third of respondents (33%) believe their water company is responsible for maintaining the water pipes at their property (up from 29% in 2007), and 32% think that their water company is responsible for maintaining their sewerage pipes and drains (up from 27% in 2007).

Chart 3.5: Who do you think is responsible for maintaining the water pipes/sewerage pipes and drains at your property?
(Base: All respondents)



As in previous years, owner occupiers are the most likely to say that they are responsible for the maintenance of water pipes at their property (61%). The proportion of private renters who think that they are responsible has fallen significantly over the past year, from 61% in 2007 to 48% in 2008. Social renters are the least likely to say that they are responsible for the water pipes at their property (14%). This is to be expected as for council tenants, the maintenance of their pipes is the responsibility of the council, and not them as individuals.

It is still clear however, that there is some confusion among all housing tenures as to who is responsible for the maintenance of water pipes at residential properties.

Table 3.6: Responsibility for water pipes by housing tenure
(Base: All respondents)

	Owner occupier (1630) %	Private rental (161) %	Social renter (173) %
I am/the householder/landlord/organised through my insurance	60	48	14
The water company	32	35	41
The local council	3	7	30
Other	1	5	6
Don't know	4	4	8

SERVICE STANDARDS AND COMPENSATION

There are a number of customer service standards all water companies must comply with which are set out to protect the rights of customers, and if a water or sewerage company fails to meet certain customer service standards for reasons within their control, customers may be entitled to compensation. Two in five respondents (40%) claim to be aware that under certain circumstances they may be entitled to compensation. (In 2006 39% claimed awareness and 44% were aware in 2007). So awareness has remained around the two in five level in every survey.

As in 2007 respondents in the South West are the most likely to be aware that they may be entitled to compensation (54%).

There are a number of other significant differences by sub-groups:-

- respondents of a higher social grade are more likely than others to say that they are aware (46% of AB's compared with 32% of DE's)
- consistent with the social grade differences, owner occupiers are more likely than renters to be aware (42% of owner occupiers compared with 31% of private renters and 26% of social renters)
- single parents are less likely than others to be aware (29% of single parents compared with 40% of all other households)
- only a third (33%) of those with a disability or long-term health condition are aware compared with 41% of those who do not have a disability or long-term health condition.

INFORMATION FROM WATER COMPANIES

A new question was added in 2008 to examine how likely customers would be to read information provided by their water and sewerage company about the services they receive. Seven in ten customers (70%) say that they are likely to read information sent to them by their water company, but there are 29% who say that they would be unlikely to read anything sent to them by their water company (20% not very likely and 9% not at all likely). The sub-groups in which substantial numbers said they would be unlikely to read information were often those potentially in greatest need of help. So:-

- 41% of single parents and;
- 34% of social renters would not read information.

Increasing awareness of consumer rights and responsibilities among these groups could be a challenge.

CONTACTING WATER COMPANIES

Overall 18% of respondents say that they have contacted their water company to make an enquiry in the past 12 months. The number of people who say that they have made enquiries to their water company has risen steadily over the years from 12% in 2006, to 16% in 2007 and now 18% in 2008.

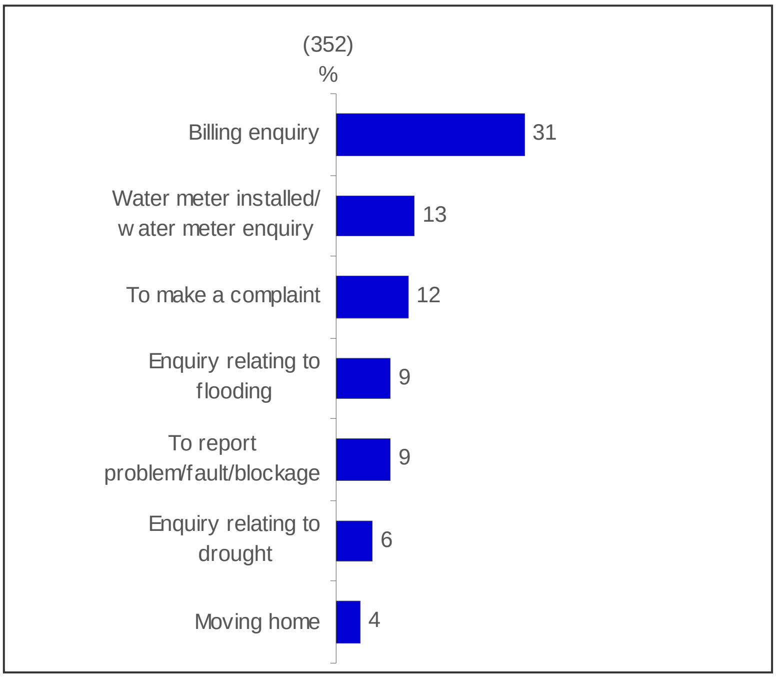
Younger respondents are the most likely to say that they have made an enquiry in the last 12 months (25% of 18-34 year olds compared with 18% of those 35-44, 17% of 45-60 year olds, 16% of 61-74 year olds, and just 8% of respondents aged 75+).

Respondents with a water meter are more likely than those without to say that they have made an enquiry in the past 12 months (23% compared with 14%).

There also appears to be a link between social grade and likelihood to make an enquiry. More affluent households are more likely to have made contact with their water company in the past 12 months (22% of AB’s compared with 14% of C2DE’s).

The reasons for making contact are very similar to those mentioned in 2007. The most common reason was a billing enquiry (mentioned by 31% of those making contact).

Chart 3.7: Reasons for making contact
(Base: All making contact)

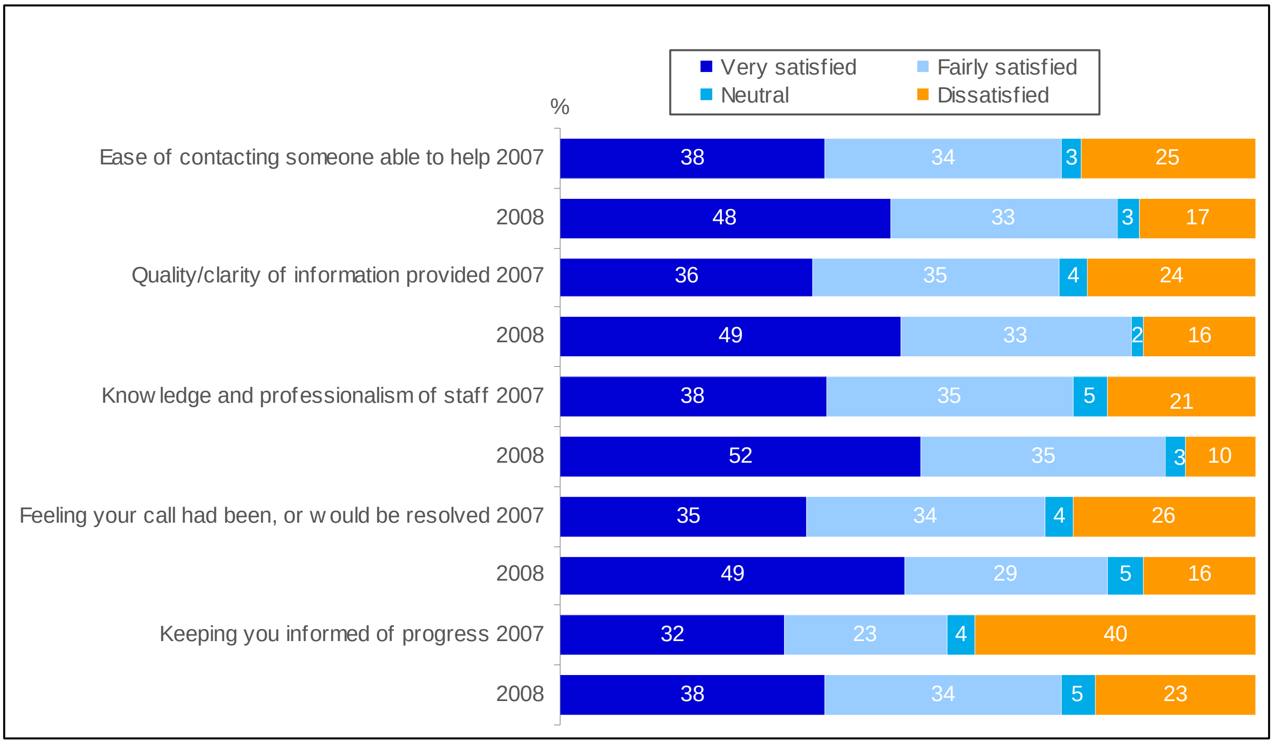


The following chart shows customers' satisfaction with the contact with their water and/or sewerage company, and it is clear in comparing 2008 against 2007 that many more customers were satisfied than dissatisfied in terms of ease of contact, information provided, knowledge and professionalism of staff, and feeling the issue would be resolved.

These results are very positive and show that water companies have improved the way they deal with customer enquiries over the past year, with satisfaction with contact improving on all measures and the number of dissatisfied customers falling significantly on all measures.

On every measure in every water region, over half those making enquiries were very or fairly satisfied with the performance of their water and/or sewerage company.

Chart 3.8: Satisfaction with contact
(Base: All respondents contacting their water company excluding DK/not applicable)

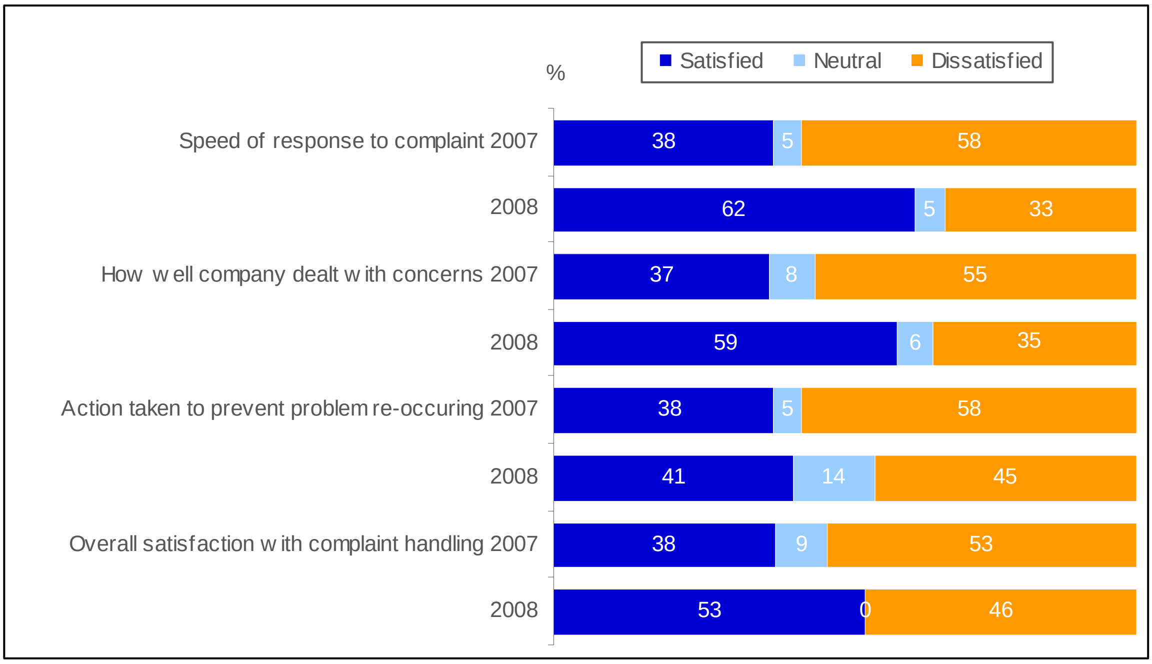


MAKING A COMPLAINT

When prompted, a total of 4% of respondents said that they had made a complaint to their water or sewerage company in the last 12 months (this compares to 5% in 2007), and this still represents a sizeable number of complaints.

As with satisfaction with contact, the satisfaction with various aspects of the complaint handling process has improved on all measures over the past year.

Chart 3.9: Satisfaction with complaint handling
(Base: All respondents making a complaint to their water company in the past 12 months excluding DK)



Between 2006 and 2007 the number of customers dissatisfied with the complaint handling process increased on all measures. However in 2008 the number of dissatisfied customers has fallen dramatically over the past year, and is now below the levels seen in 2006.

Table 3.10: Proportion of customers dissatisfied with complaint handling
(Base: All respondents making a complaint to their water company in the past 12 months excluding DK)

	2006 (111) %	2007 (100) %	2008 (91) %
Speed of response to complaint	46	58	33
How well company dealt with concerns	52	55	35
Action taken to prevent problem re-occurring	51	58	45
Overall dissatisfied	**51**	**54**	**46**

Overall, 53% of customers were satisfied with the way their complaint was dealt with, and when compared with the energy and telephone landline markets, this compares favourably. FDS's most recent CompariSat® benchmarking data[2] shows that 36% of those making a complaint to their telephone landline company were satisfied with the way their complaint was dealt with, and just 27% of those making a complaint to their energy company were satisfied.

[2] Figures taken from FDS CompariSat® Survey 2007 - based on 100 customers making a complaint to their telephone landline company and 106 making a complaint to their energy company.

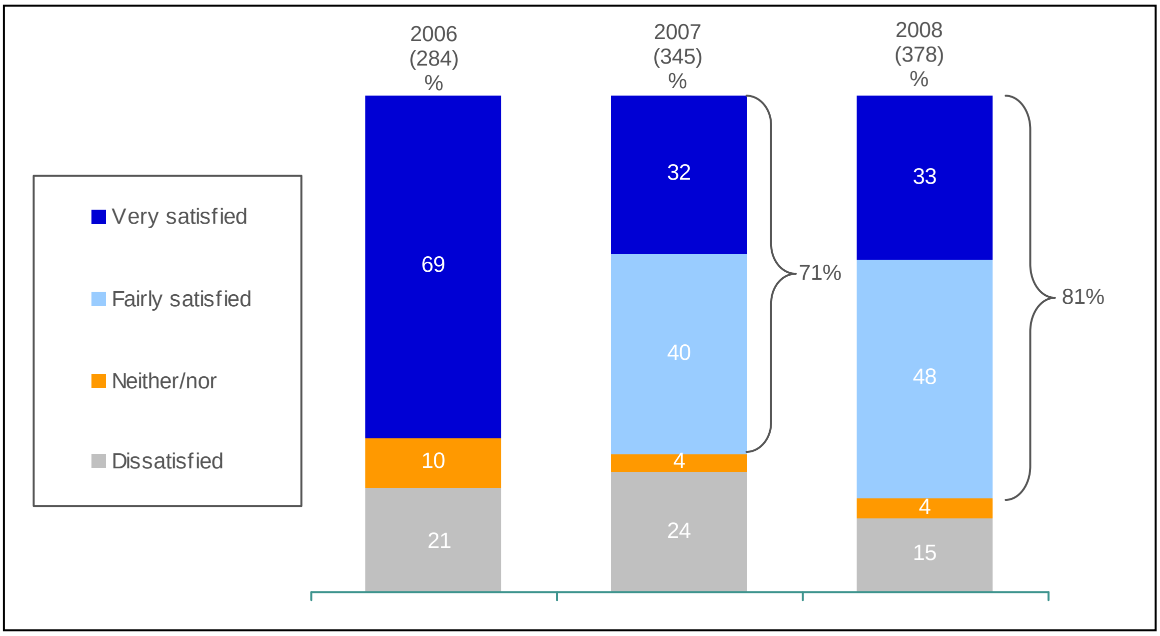
OVERALL SATISFACTION WITH CONTACT

Including those who when prompted remembered making complaints 18% had contact with their water company in the last twelve months.

Taking everything into account, four in five (81%) of these respondents say that they are satisfied with the contact with their water company. This represents a significant improvement on the 2007 results when 71% said that they were satisfied.

In every region in 2008, at least three quarters of those making contact were satisfied.

Chart 3.11: Overall satisfaction with contact
(Base: All respondents contacting their water company excluding DK)



Those who are satisfied with the value for money from their water and sewerage supply are significantly more likely to say that they are satisfied with the contact with their water company (90% compared with 63%). This suggests people's experiences of contact with their water company influences their value for money perceptions and vice versa.

Those who were dissatisfied with the contact with their water company were asked why they were not satisfied. The main reasons given were because of poor/unsatisfactory service and issues not dealt with (36%) or a lack of or poor information (22%). 15% said that it was because their bills were too expensive or prices had risen.

Table 3.12: Main reasons for dissatisfaction with contact
(Base: All respondents not satisfied with contact)

	(68) %
Poor/unsatisfactory service/issues not dealt with	36
Poor/lack of/slow/incorrect information	22
Cost/expensive/prices have risen	15
Difficult/slow to contact/no direct contact	13
Payment/Direct Debit issues	7
Staff inefficient/lack of knowledge	7
Staff unhelpful/fobbed me off	4

4 WATER ON TAP

This section explores customers' views on a number of issues relating to their water supply including their overall satisfaction with their water supply, tap water versus bottled water and efforts to encourage consumers not to waste water.

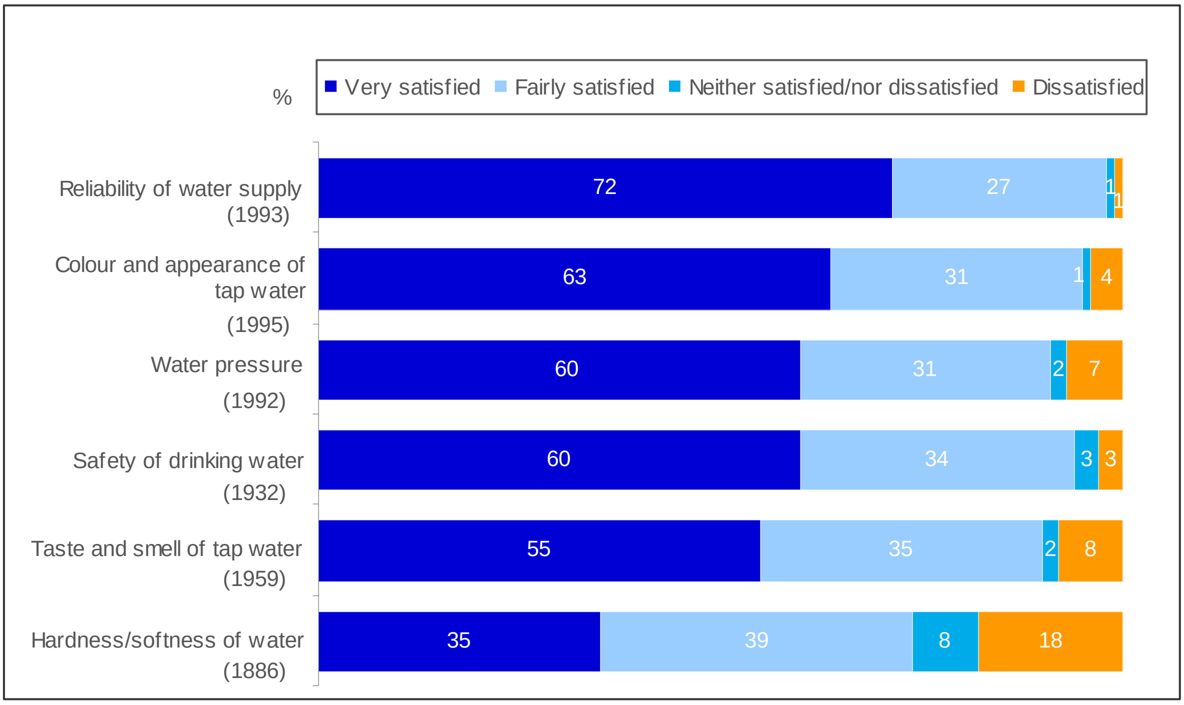
Summary

- Satisfaction with overall water quality is very high and continues to improve year on year.
- Very few respondents feel that the service they receive from their water company has got worse over the past year.
- The proportion of adults who think that bottled water is better for them has fallen over the past year
  - and more people now agree that they usually drink tap rather than bottled water.
- Seven in ten respondents claim to take measures to reduce their use of water
  - three in ten say that they don't know what they do or do not take any measures to reduce their use of water.

SATISFACTION WITH WATER SUPPLY

There are high levels of satisfaction for nearly all aspects of water supply, with very few customers dissatisfied with their water supply. Customers are most satisfied with the reliability of their water supply (98%), and least satisfied with the hardness/softness of their water (74%).

Chart 4.1: Satisfaction with various aspects of water supply
(Base: All respondents excluding DK)



While most people declared themselves satisfied with each aspect of water supply, there were small numbers who were dissatisfied and small numbers who felt unable to answer. So as well as 3% expressing neutral and 3% negative views on the safety of their drinking water a further 3% felt unable to give an assessment at all. In the case of hardness/softness 6% felt unable to offer a view.

As the following chart illustrates, all measures have shown a year on year increase in satisfaction from 2006-2008.

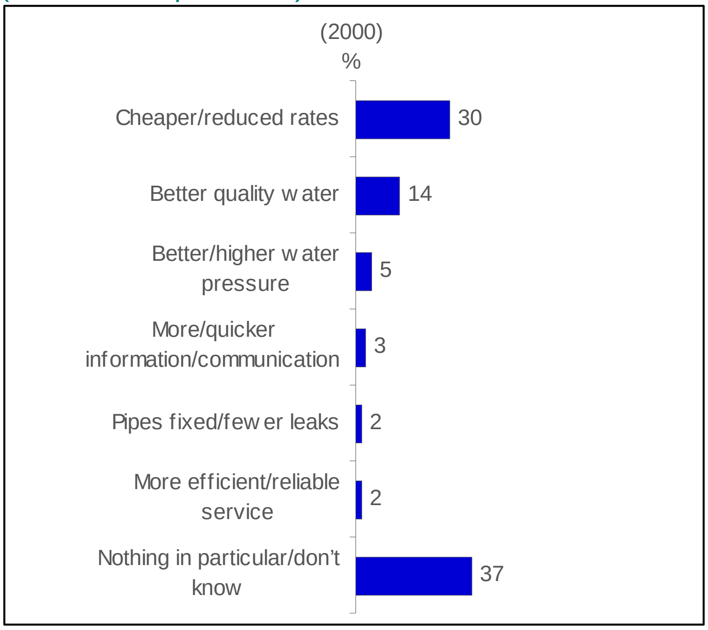
Table 4.2: Satisfaction with various aspects of water supply 2006 – 2008
(Base: All respondents excluding DK)

	2006 %	2007 %	2008 %
Reliability of water supply	95	97	98
Colour and appearance of tap water	90	94	95
Water pressure	87	89	91
Safety of drinking water	87	92	94
Taste and smell of drinking water	83	87	90
Hardness/softness of water	68	72	74
Overall satisfaction	**92**	**94**	**96**

The majority of respondents (96%) are satisfied overall with their water supply, and there is very little difference in satisfaction by region. In 2007 respondents in the Midlands (89%) and the South West (90%) were less likely to be satisfied when compared to some other regions, however in 2008 overall satisfaction with water supply has improved in these two regions and now satisfaction in all regions is 94% or higher.

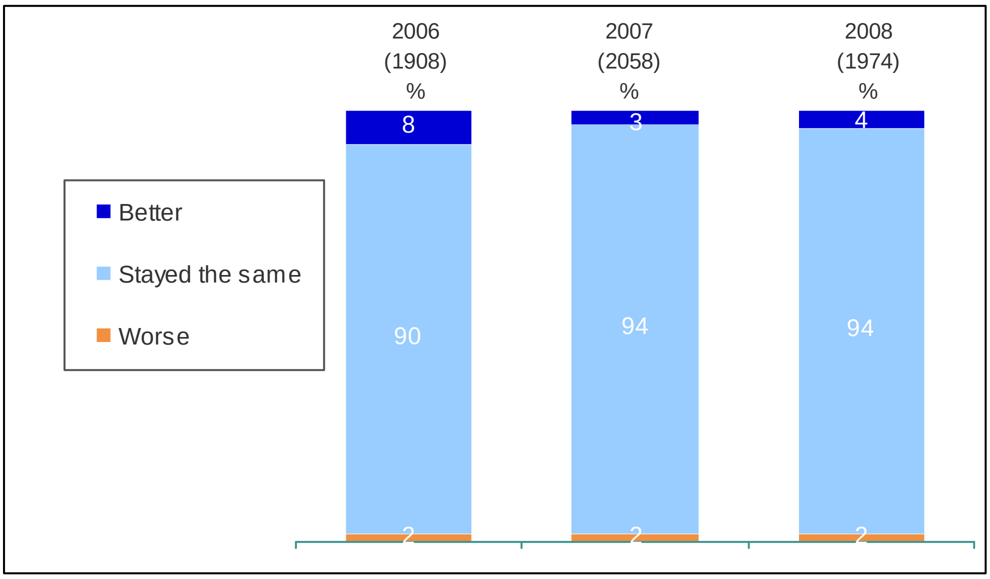
As in 2006 and 2007, reducing prices and improving the quality of water are still the most widely suggested improvements to the overall service provided by the water companies. As we might expect, respondents in the South West are significantly more likely than respondents from all other regions to suggest reduced rates (53%). Respondents in the Thames region are most likely to mention better quality water (22%).

Chart 4.3: If you could make one single improvement to the overall service provided by your water company what would it be?
(Base: All respondents)



Very few respondents (2%) think that service from their water company deteriorated over the past year. The vast majority (94%) think that the service has stayed the same over the past year.

Chart 4.4: Changes in service over the past year
(Base: All respondents excluding DK)

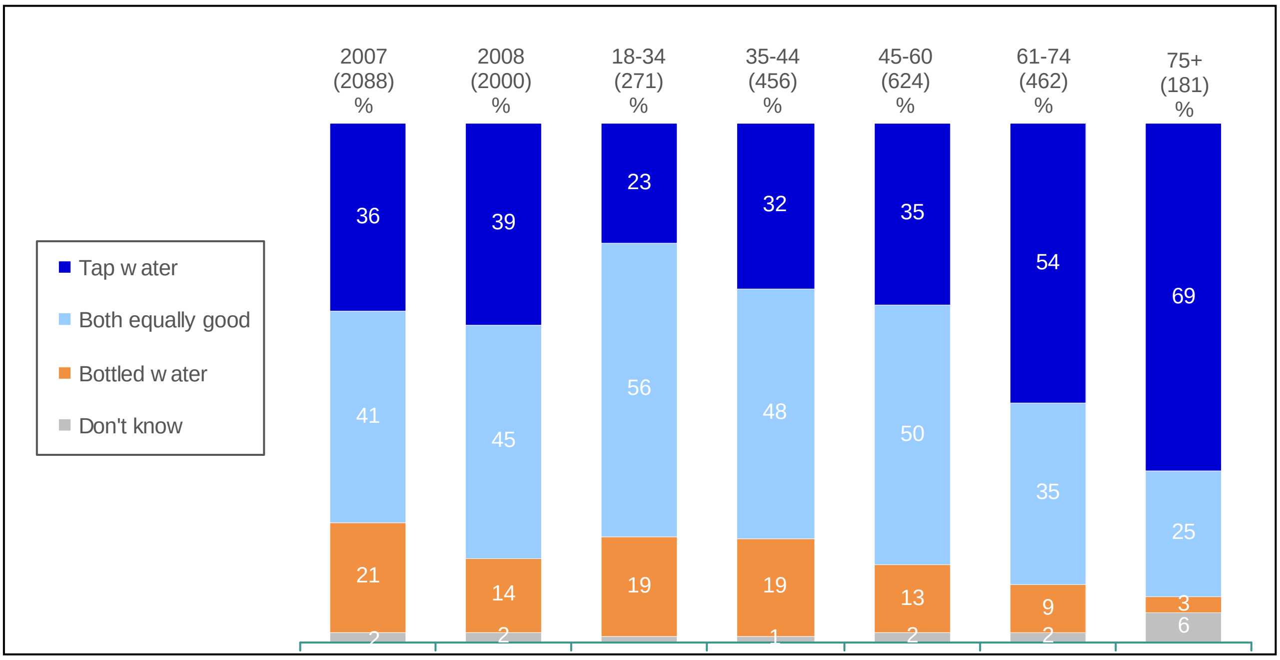


TAP WATER VS. BOTTLED WATER

The majority of adults (85%) believe tap water to be at least as good for them as bottled water, and as Chart 4.5 illustrates more people now believe tap water to be better for them than bottled water (39% in 2008 compared with 36% in 2007). The proportion of adults who believe that bottled water is better for them has fallen from 21% in 2007 to 14% in 2008.

As in 2007 there is a clear link between age and opinions on bottled versus tap water with younger respondents more likely to favour bottled water, whereas older respondents are more likely to think that tap water is better for them. There has however been a big shift in perceptions among younger adults (18-34). In 2007 37% of 18-34 year olds thought that bottled water was better for them but this has fallen sharply to just 19% in 2008.

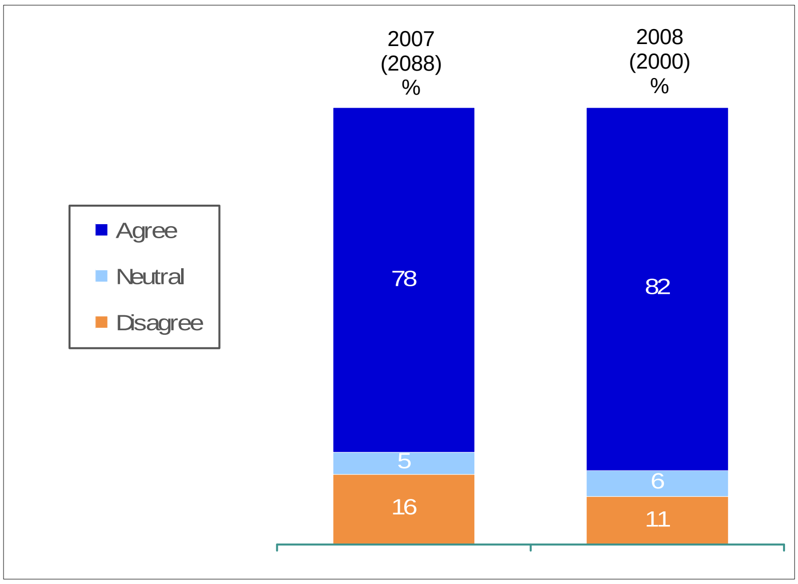
Chart 4.5: Which is better for you?
(Base: All respondents)



Those who are overall dissatisfied with their water supply, are more likely than those who are satisfied to say that they think bottled water is better for them (34% compared with 13%).

As well as the increase over the last year in those thinking that tap water is at least as good for them as bottled water, there has also been a decline in the number of people who say that they usually drink bottled rather than tap water. Over four in five respondents (82%) agree that they usually drink tap water rather than bottled water (compared with 78% in 2007).

Chart 4.6: Agreement with the statement - I usually drink tap rather than bottled water
(Base: All respondents)



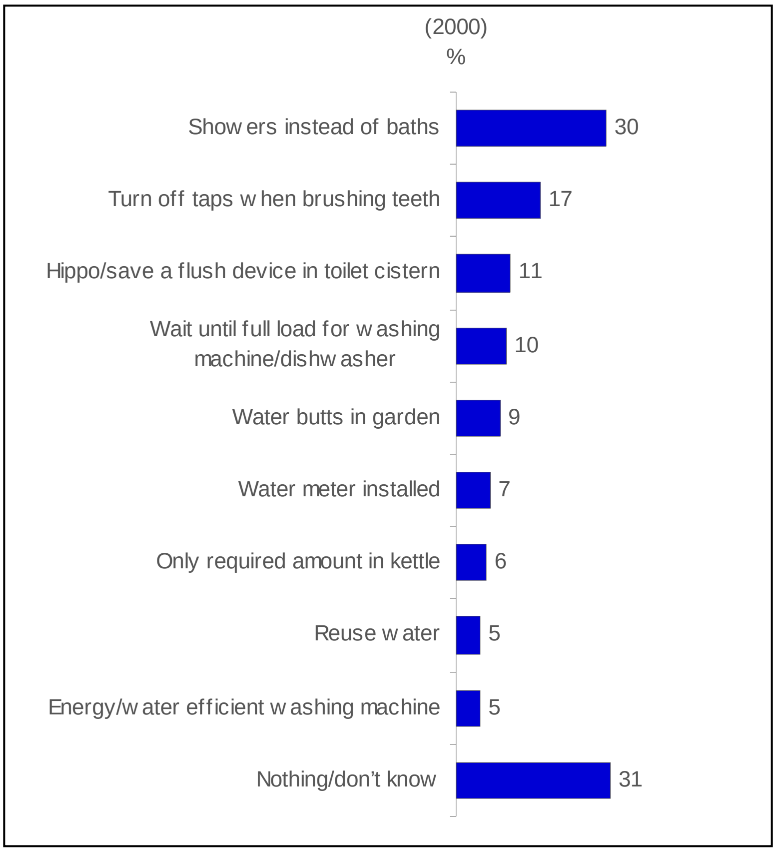
Older respondents are more likely to say that they usually drink tap water rather than bottled water (93% of those aged 75+ and 87% of 61-74 year olds compared with 79% of those 60 and under).

As we might expect, those who are satisfied with their water supply are more likely than others to say that they usually drink tap water (83% compared with 61%).

REDUCING USE OF WATER

Encouraging people to use water wisely is one of CCWater's key areas of work and a wide range of actions are claimed by customers to reduce their use of water. Seven in ten (69%) claim to take specific measures to reduce their use of water, but there are still three in ten (31%) who say that they don't do anything or don't know what they could do to reduce their use of water.

Chart 4.7: Actions taken to reduce use of water – main unprompted answers
(Base: All respondents)



Those who live in rented accommodation are the least likely to take measures to reduce their use of water (71% of owner occupiers claim to take measures to reduce their use of water compared with 60% of renters).

AWARENESS OF WATER CAMPAIGNS

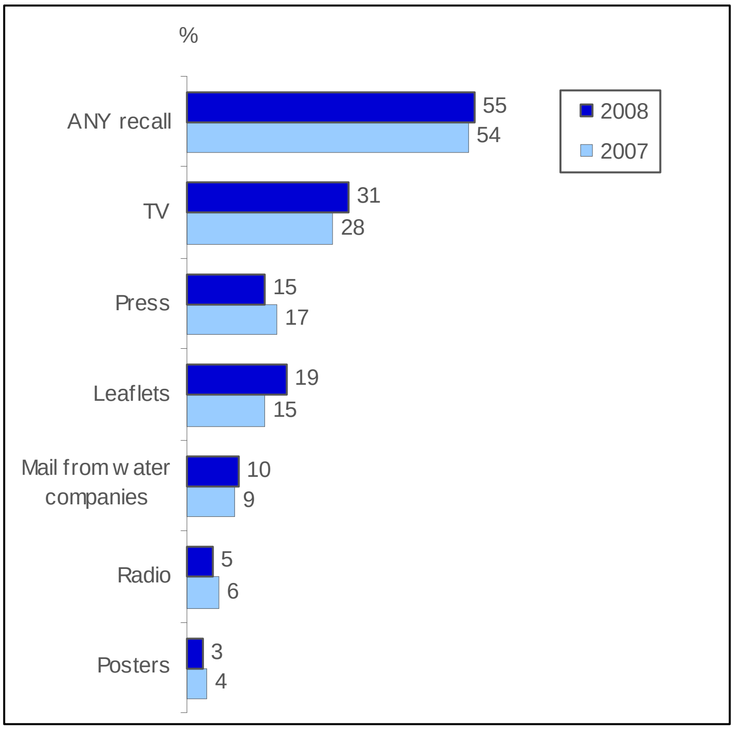
Just over half (55%) claim to have been made aware of campaigns to use water wisely in the past 12 months, and as the chart below shows there has been little change in results over the past year.

Water saving initiatives, although ongoing at individual water company level, naturally have a lower media profile when we are not experiencing a drought anywhere. Whilst the level of claimed awareness (55%) of water saving campaigns is encouraging, it may be that this awareness is being enhanced by other environmental campaigns with different ultimate aims.

For example, in the last couple of years campaigns by water companies, CCWater and others have started to highlight the link between water use, saving energy (for example by boiling only as much water as you need in the kettle) and the resulting CO2 reductions (as well as the possible money saving dimension). It is also possible that awareness has to some extent been reinforced by the government's 'Act on CO2' campaigns that have appeared on TV in recent years.

It is also important to note that in research surveys, questions on advertising or campaign recall will often generate mentions of TV even if there was no TV advertising, so the high levels of mentions of TV are not unusual. Press advertising and direct mail campaigns have clearly been noticed by some customers.

Chart 4.8: How have you been made aware, if at all, of campaigns to use water wisely?
(Base: All respondents)



5 CLEANING UP

In this section we explore customers' views on a number of issues relating to the disposal of waste, including views on what is acceptable to dispose of down the toilet, sink, or drain, what happens to waste water, and overall satisfaction with sewerage services.

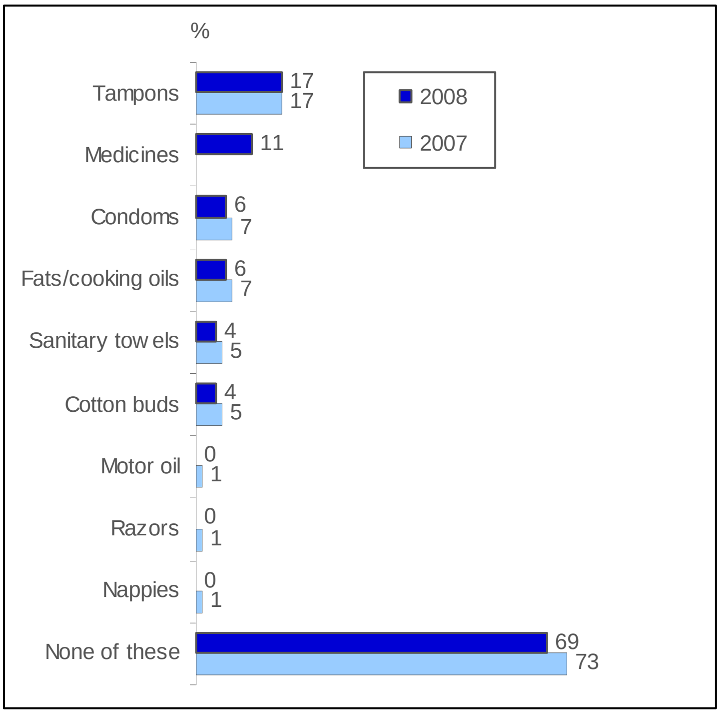
Summary

- There is still some confusion among a significant minority of customers as to what is acceptable to dispose of down the toilet, sink or drain.
- A quarter of respondents are not aware that waste water is cleaned at treatment sites before being released into the environment.
- As in 2007 roughly nine in ten are satisfied with their overall sewerage service
  - and satisfaction with all aspects of service has improved slightly over the past year.

DISPOSING OF WASTE

There are a number of items which are not appropriate to dispose of down the toilet, sink, or drain. None of the items listed in Chart 5.1 are acceptable, yet some respondents still believe they are. There is little change since 2007 in what people think is acceptable to dispose of in this way and 17% still think it is acceptable to flush tampons down the toilet. In 2008 respondents were asked if they think it is acceptable to dispose of medicines down the toilet, sink or drain, and one in nine (11%) say that they think that it is acceptable. Seven in ten (69%) correctly answered that none of the items below are acceptable to dispose of down the toilet, sink, or drain.

Chart 5.1: which of the following are acceptable to dispose of down the toilet, sink, or drain?
(Base: All respondents)

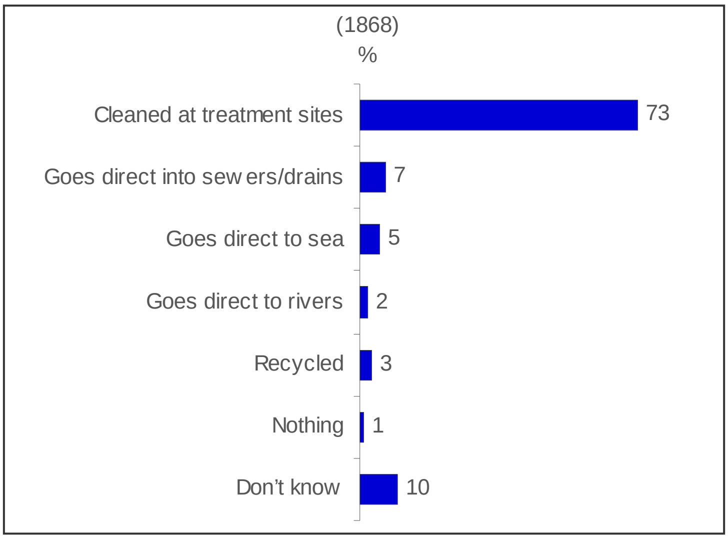


WASTE WATER

Waste water that goes down the toilet or sinks from households in the UK is cleaned at treatment sites before it is released back into the environment. In some cases waste water goes into a septic tank instead of the public sewer.

Nearly three quarters of respondents without septic tanks (73%) were aware that their waste water was cleaned at treatment sites, however some believe it goes direct into the sea or rivers without being treated.

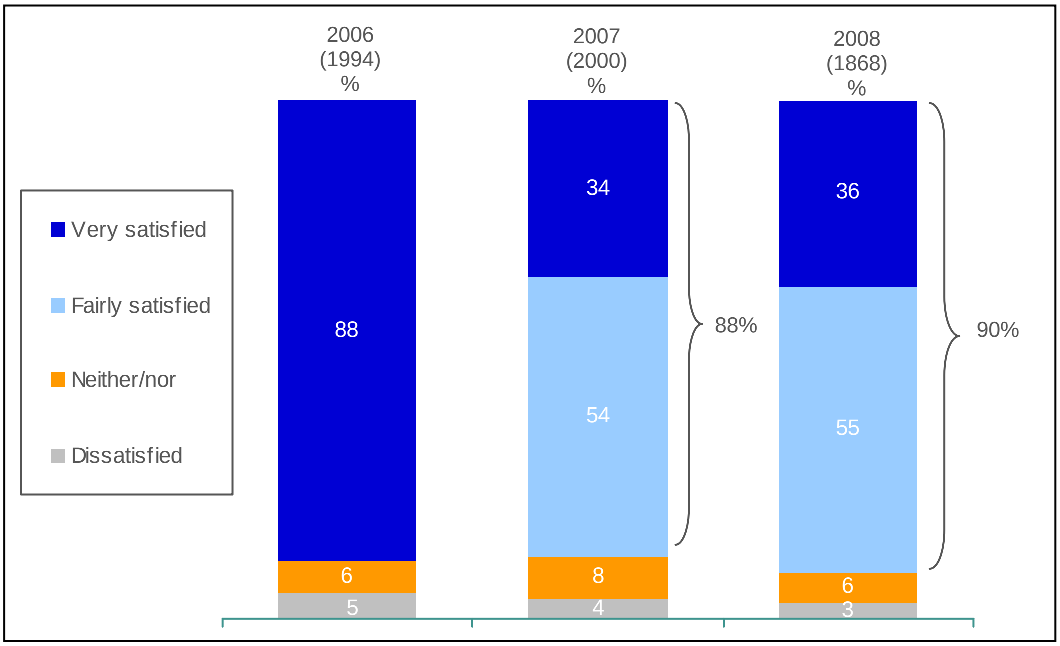
Chart 5.2: What happens to waste water that goes down the toilet/sink in your property?
(Base: All respondents excluding those with septic tanks)



SATISFACTION WITH SEWERAGE SERVICES

Satisfaction with sewerage services has improved since 2006, with a total of 90% saying that they are satisfied with the service they receive. The proportion of dissatisfied customers has reduced from 5% to 3% over the last two years.

Chart 5.3: Overall satisfaction with sewerage services
(Base: All respondents excluding those with septic tanks and don't knows)

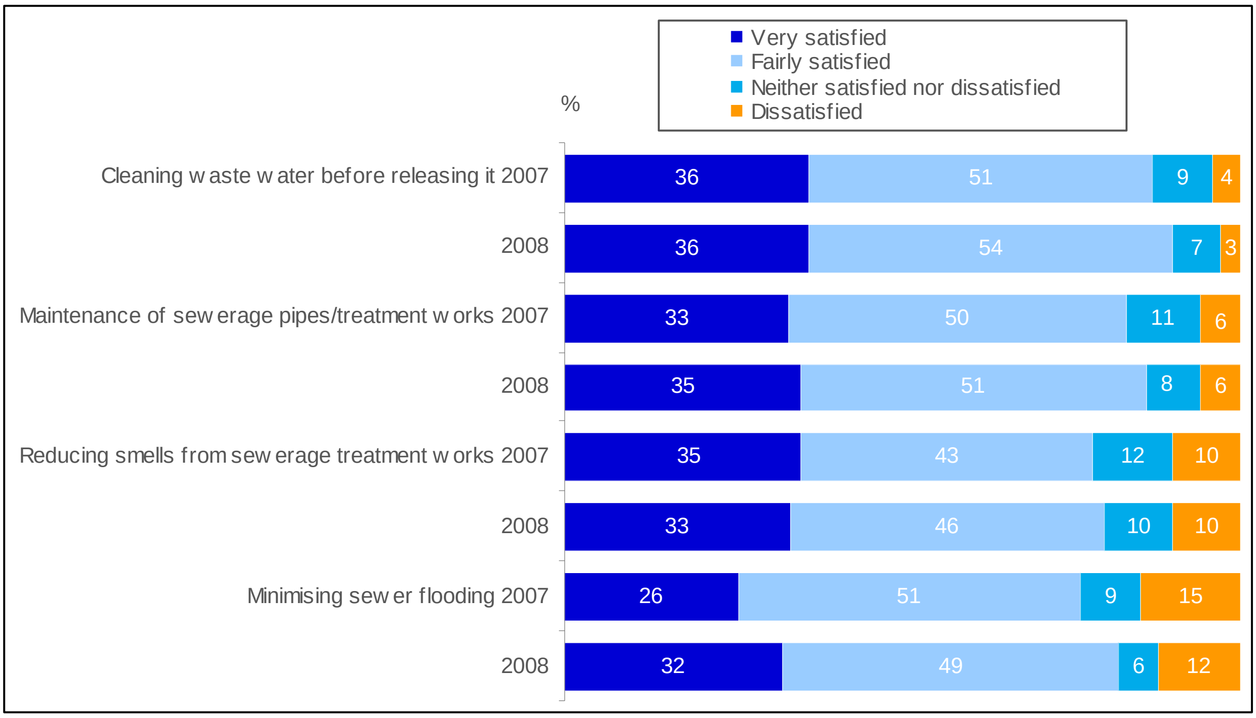


Younger respondents (18-34) are the least likely to say that they are satisfied with the service they receive from their sewerage company (84% of those aged 18-34 are satisfied, compared with 92% of those aged 35+).

Those who are satisfied with the value for money from their sewerage services are more likely to say that they are overall satisfied with their sewerage services (94% of those satisfied, compared with 82% of those dissatisfied with the value for money).

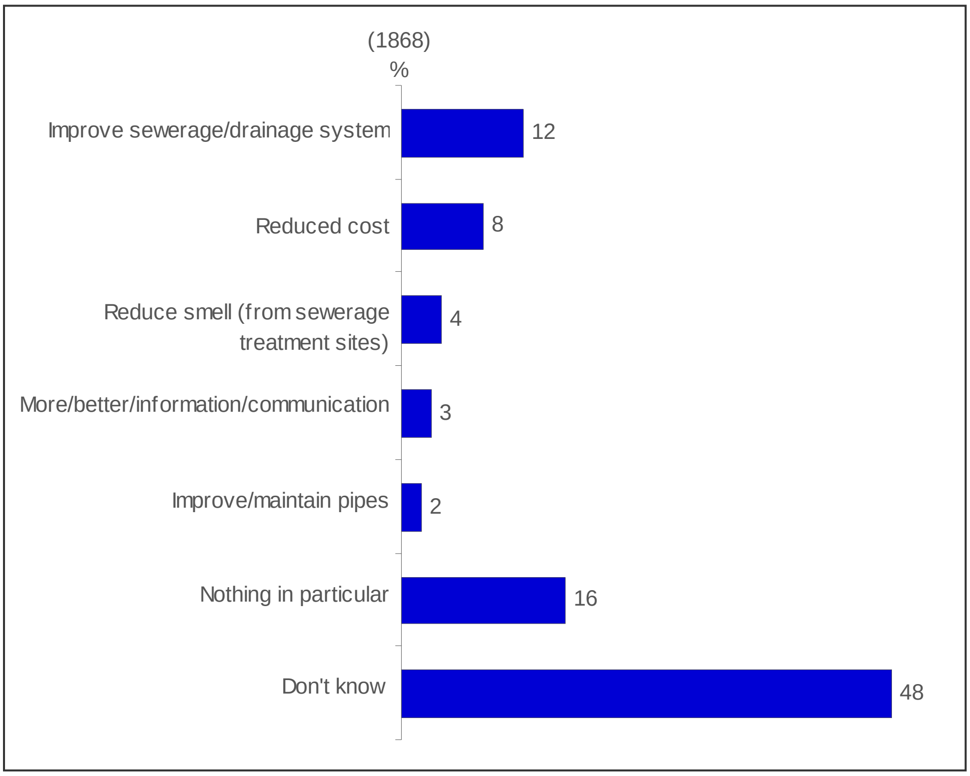
When examining in more detail customers' satisfaction with different aspects of their sewerage company's management of services, there have been slight improvements on all measures over the past year and few respondents are dissatisfied with any aspect of their sewerage service.

Chart 5.4: Satisfaction with various aspects of sewerage services
(Base: All respondents excluding those with septic tanks and don't knows)



As the following chart shows, when asked what could be done to improve their sewerage services nearly half (48%) say that they don't know, and a further 16% say nothing in particular. Reduced costs (8%) and improved sewerage/drainage systems (12%) are the most commonly cited ways that their sewerage services could be improved.

Chart 5.5: What could be done to improve sewerage services
(Base: All respondents excluding those with septic tanks)



6 COMPARISONS WITH OTHER UTILITIES

In this section we further examine perceptions of water companies and make comparisons with other utilities. Comparative value for money has already been covered earlier in this report, and this section focuses on issues such as levels of trust, the feeling that companies care about the service they provide, and overall satisfaction with service.

Summary

- Customers are more likely to think that their water/sewerage company cares about the service it provides than they are to think that their energy company does.
- They are also more likely to say that they trust their water/sewerage company than their energy company.
- Overall satisfaction with service provided is higher for water and sewerage companies than telephone landline companies, energy companies and local councils.

COMPANIES CARING ABOUT THE SERVICE THEY PROVIDE

In a competitive market such as gas and electricity where retaining customers is key to a supplier's business strategy one might expect customer service standards to be higher than the water/sewerage industry (where customers are not able to switch suppliers). However customers are significantly more likely to agree that their water and/or sewerage company cares about the service they give to customers than their gas or electricity company.

Chart 6.1: Agreement that companies care about the service they give to customers
(Base: All respondents)

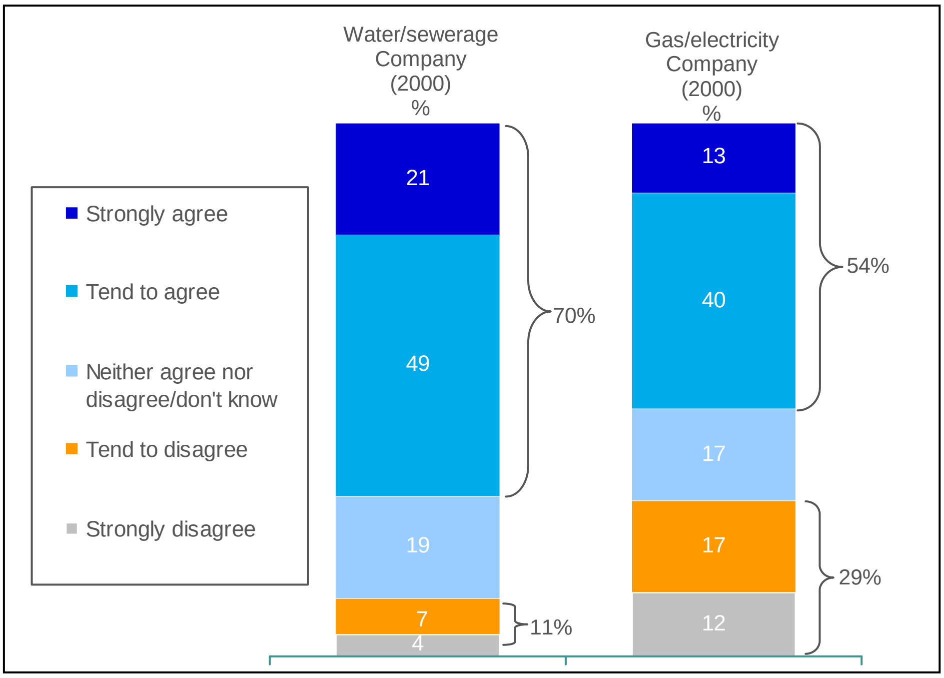
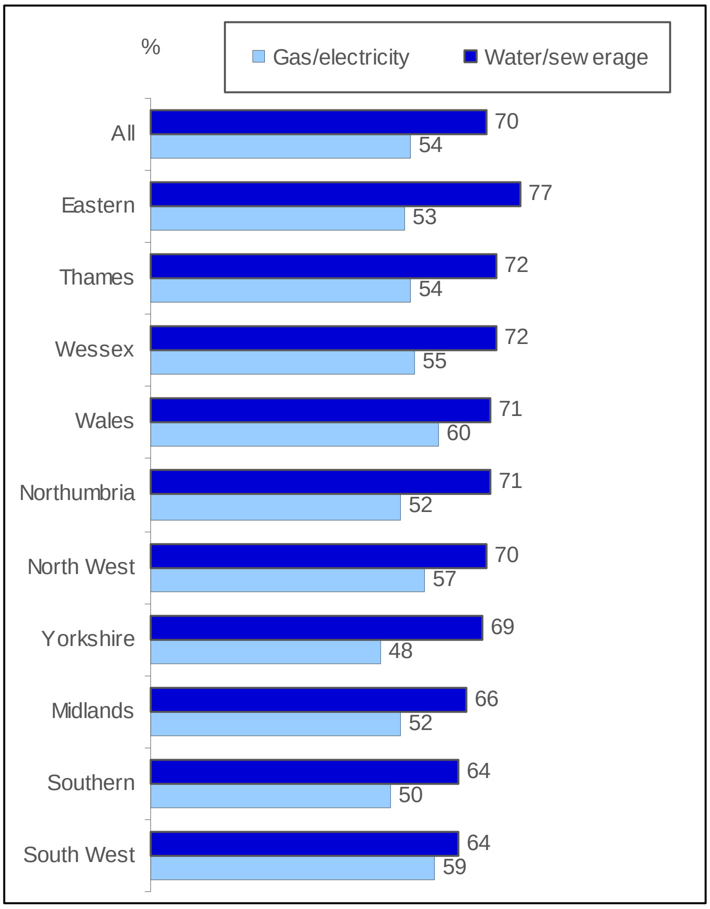


Chart 6.2 illustrates the regional differences in those who feel that their water and/or sewerage company and energy company cares about the service it gives to customers. There are wide gaps between perceptions of water/sewerage and energy companies everywhere except South West.

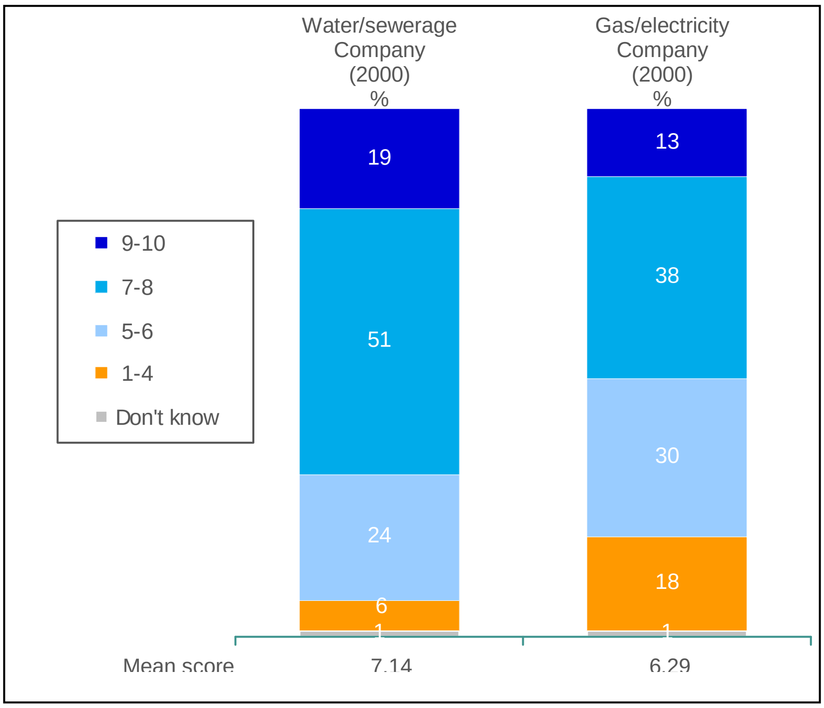
Chart 6.2: Agreement that companies care about the service they give by region
(Base: All respondents)



TRUST IN WATER/SEWERAGE COMPANIES AND ENERGY COMPANIES

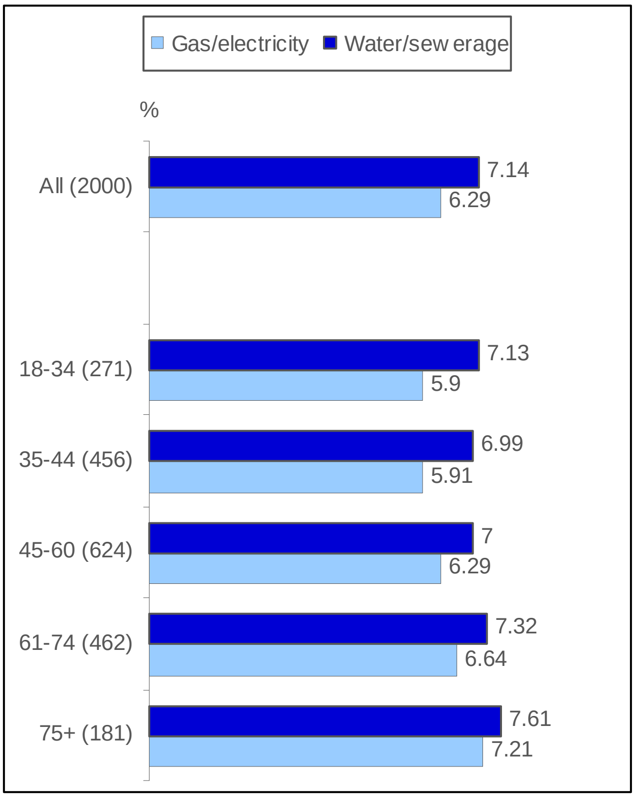
Respondents were asked how much they trust their water/sewerage company and energy company on a scale of 1-10 where 10 means that they trust them completely and 1 means that they don't trust them at all. It is clear that customers tend to trust their water and/or sewerage company far more than they trust their energy company with seven in ten (70%) giving their water or sewerage company a high score of 7-10 compared with just over half (51%) giving their energy company the same high scores.

Chart 6.3: Trust in water/sewerage and energy companies
(Base: All respondents)



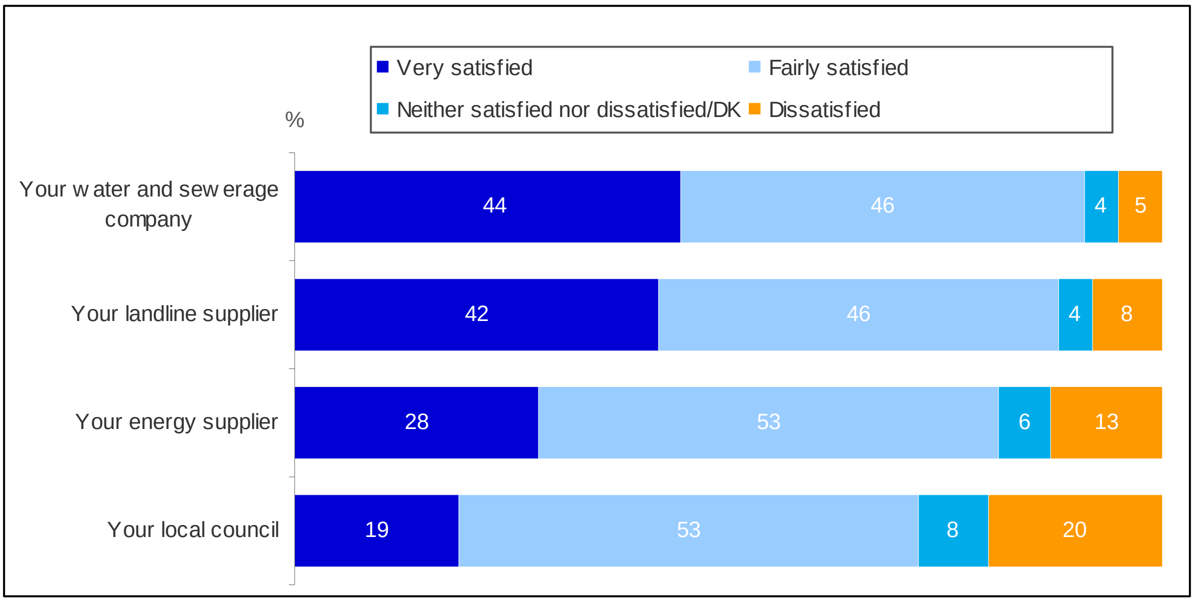
Older adults are more trusting of both their energy and water/sewerage company, but as Chart 6.4 shows, the gap between the trust scores of water/sewerage and energy companies is greatest among younger adults, who are particularly mistrustful of energy companies.

Chart 6.4: Trust in water/sewerage and energy companies by age
(Base: All respondents)



In the 2008 survey respondents were asked how satisfied they were overall with the service provided by different organisations. As the following chart shows satisfaction with water and sewerage companies compares favourably with other services.

Chart 6.5: Overall satisfaction with service from different companies[3]
(Base: All respondents)



[3] Satisfaction with overall service from Water and Sewerage Company is taken from the Ofwat and CCWater research into competition in the water and sewerage industry 2008.

7 SPEAKING UP FOR WATER CONSUMERS

In this section we explore customers' views on a number of issues relating to the reporting of problems with customers water and sewerage supply, awareness of CCWater, and the perceived importance of CCWater as an organisation.

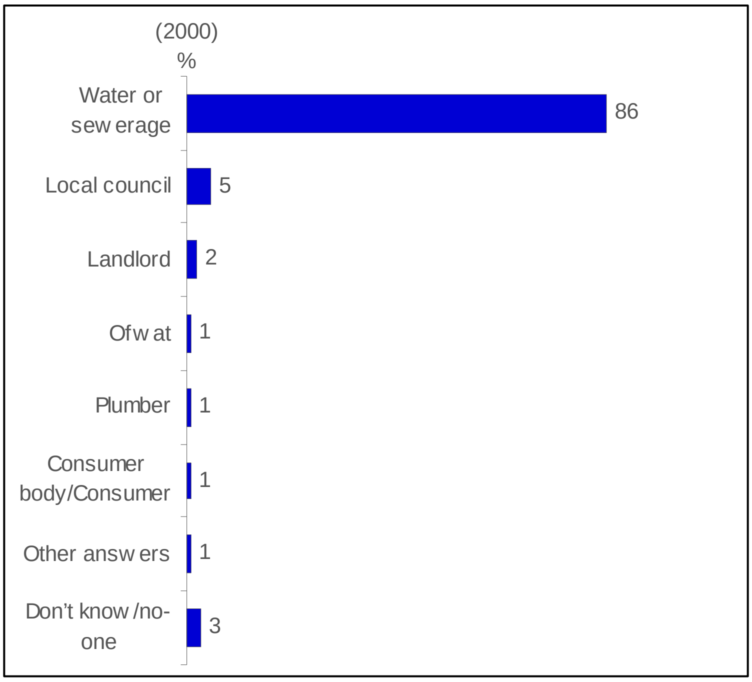
Summary

- As in previous years the majority of respondents would contact their water company if they had a problem.
- Spontaneous awareness of CCWater is still very low
  - 0.3% know that CCWater is the consumer body for the water industry and three in ten respondents mistakenly think that the consumer body is Ofwat.
- Prompted awareness has increased slightly over the past year with one in five respondents now aware of CCWater.
- Nearly all customers think that it is important to have a consumer body representing their interests about the water and sewerage services they receive.
- Few interviewees have contacted CCWater in the past year but all who did so were very satisfied with all aspects of the contact.

WHO TO CONTACT TO REPORT A PROBLEM

The majority of respondents (86%) say that they would contact their water or sewerage company if they had a problem (this is consistent with the 2007 results when 85% said that they would contact their water or sewerage company).

Chart 7.1: Who would you contact if you had a problem with your water or sewerage services?
(Base: All respondents)



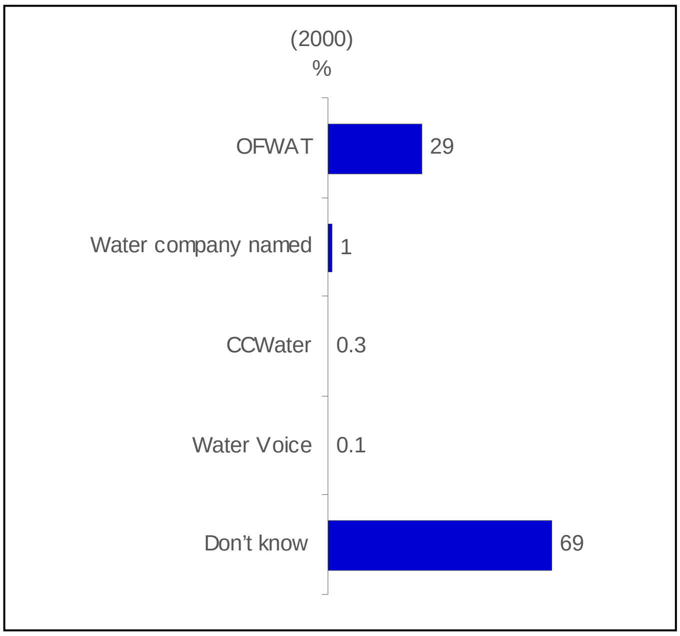
Owner occupiers and private renters are most likely to contact their water or sewerage company (90% of owner occupiers, and 85% of private renters, compared with 62% of social renters). Social renters are more likely to contact their local council (27%, compared with 3% of owner occupiers, and 3% of private renters).This is to be expected as for many of those living in council owned homes it will be the council who is responsible for dealing with any household problems of this nature.

AWARENESS AND PERCEIVED IMPORTANCE OF CCWATER

As in previous years, spontaneous awareness of CCWater is very low, and among those who think that they know who the consumer body is, Ofwat is mentioned by most (29% of respondents think that Ofwat is the consumer body, compared with 0.3% who mentioned CCWater). Although only 0.3% spontaneously mention CCWater as the consumer body for the water industry, this does represent a slight increase since 2007 when only one respondent (0.05%) spontaneously mentioned CCWater.

As a relatively new organisation, CCWater has some way to go to create the same levels of awareness as Ofwat, which is a long established name in the water and sewerage industry.

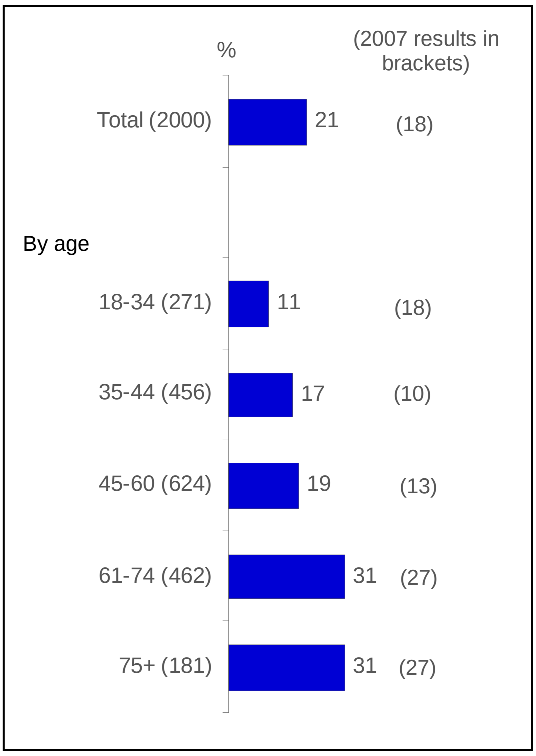
Chart 7.2: Do you know the name of the consumer body for the water industry?
(Base: All respondents)



When probed, a further 21% of respondents claimed to have heard of CCWater before taking part in the survey. This represents a slight increase in awareness over the past year (18% were aware in 2007).

As illustrated below, younger respondents are significantly less likely to say that they are aware of CCWater than older respondents.

Chart 7.3: Awareness of CCWater by age
(Base: All respondents)



Of those aware of CCWater the majority (68%) were unable to say what CCWater does, 15% think it is a consumer body, 7% think that it is a regulatory body, 4% think that it is a water company, and 3% think that it is part of Ofwat.

Interestingly, those who say that they are aware of CCWater are more likely to say that they are aware of other issues related to water and sewerage services. For example they are more likely to-

- say that they take measures to reduce their use of water
- be aware of what is not acceptable to dispose of down the toilet, sink, or drain
- be aware of billing options and different tariffs.

It is likely that those aware of CCWater are customers who are generally more engaged with issues relating to their water and sewerage services, while those not aware of CCWater are also less aware of other issues affecting water and sewerage customers.

Despite four in five respondents saying that they are not aware of CCWater, the majority of respondents do still think that it is important to have a consumer body representing their interests about the water and sewerage services they receive. Over one in five (22%) think that it is absolutely essential, 51% think it is very important, and 21% think that it is fairly important. Only 6% think that it is not at all/not very important to have a consumer body representing their interests about the water and sewerage services received.

Chart 7.4: Importance of having a consumer body representing your interests about the water and sewerage services received
(Base: All respondents excluding DK)

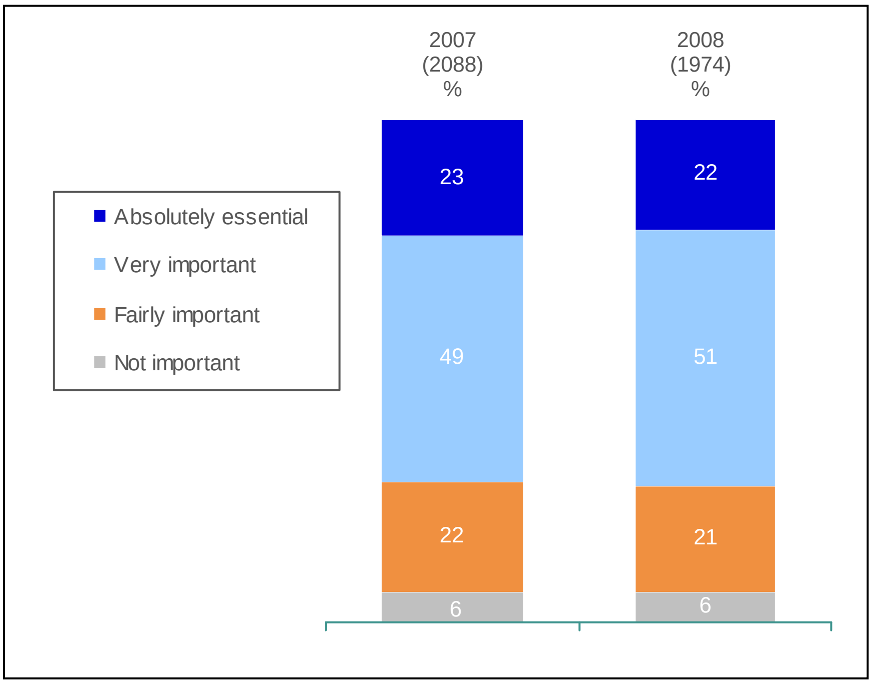


Table 7.5 shows how aware respondents are of a number of issues relating to CCWater. Over half of the 21% of all respondents aware of CCWater say that they would know how to contact CCWater if they had a problem or needed advice. This means that 12% of water customers are aware of CCWater AND would know how to contact them. 47% of those aware of CCWater rate CCWater as being effective in representing their views and 35% say that they have seen references to CCWater or CCWater press notices.

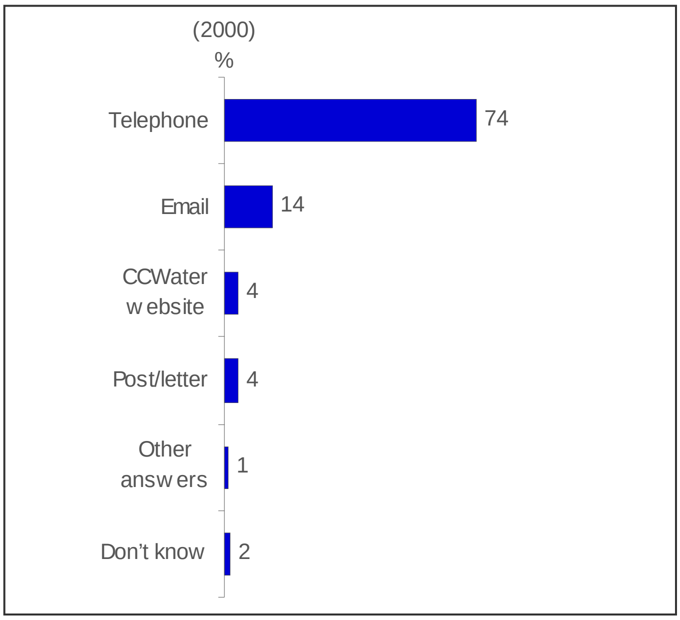
Table 7.5: Agreement with statements about CCWater
(Base: All aware of CCWater – 420)

	Agree %	Neutral %	Disagree %	Don't know %
I know how to contact CCWater if I have a problem or need advice	55	5	34	5
I rate CCWater as being effective in representing my views	47	17	13	24
I have seen references to CCWater or CCWater press notices	35	12	42	11

CONTACTING CCWATER

The majority of respondents say if they needed to, their preferred method of contact with CCWater would be via telephone (74%). This result is similar to 2007 when 76% stated the telephone as their preferred method of contact.

Chart 7.6: Preferred method of contacting CCWater
(Base: All respondents)



A total of four respondents say that they had contacted CCWater in the last year (this represents 0.2% of the total sample). All four respondents had contacted CCWater to make a complaint about their water company, and all were very satisfied with all aspects of their contact.

8 CONCLUSIONS AND RECOMMENDATIONS

Overall, results of the 2008 survey are consistent with those in 2007 but some changes are evident.

- Nearly all customers feel that it is important to have a consumer body representing their interests about the water and sewerage services they receive, yet they do not know who is responsible for this. Awareness of CCWater has increased slightly over the past year but there are still nearly four in five who say that they have not heard of CCWater. There is scope for CCWater to further publicise its role and increase awareness among customers about the work it does.

- Awareness of what is now known as the WaterSure Tariff has fallen over the past year and there are lots of customers who would like to know more about this tariff. CCWater could seek to improve awareness of WaterSure and work with the water companies to ensure that this tariff is publicised to those customers who could most benefit from it.

- Awareness of the services for elderly and/or disabled customers has also fallen over the past year and those with a disability or long-term health condition are especially likely to say that they would like to know more about these services. These customers are less likely than others to say that their charges are value for money or fair so increasing awareness of the services available to them could help to improve overall perceptions among those with a disability or long-term health condition.

- Penetration of water meters varies with the characteristics of households and encouragingly those who say that they have water meters fitted are those who are most likely to benefit from having one fitted i.e. the elderly and one person households. Among younger respondents very few actively asked for a water meter to be fitted, and if they had a water meter it was most likely because they moved into a home which already had one. There is an opportunity to raise awareness among younger customers (especially those living in one person households) who may potentially benefit from having a water meter fitted.

- Satisfaction with all aspects of contact with water companies has improved over the past year. These results could be communicated to the water companies, and they should be encouraged to maintain, or even improve on these high scores over the coming year.

- Satisfaction with all aspects of complaint handling has also improved over the past year, but there is still considerable scope for improvement in this area.

- The proportion of adults who think that bottled water is better for them has fallen considerably over the past year, and more customers now agree that they usually drink tap rather than bottled water. However there are some customers (especially those under the age of 45) who still think that bottled water is better for them. There is an opportunity for CCWater to help increase awareness among these consumers that tap water is at least as good for them as bottled water.

- CCWater should aim to increase awareness of what is acceptable to dispose of down the toilet, sink, or drain as there is still some confusion among consumers as to what is acceptable to dispose of.

APPENDIX A
SAMPLE PROFILE

SAMPLE PROFILE

	Unweighted		Weighted	
	N	%	N	%
Total	**2000**	**100**	**2000**	**100**
Region				
Eastern	200	10	240	12
North West	200	10	260	13
Northumbria	200	10	100	5
Midlands	200	10	320	16
South West	200	10	60	3
Southern	200	10	160	8
Thames	200	10	460	23
Wessex	200	10	100	5
Yorkshire	200	10	180	9
Wales	200	10	120	6
Age				
18-34	271	14	360	18
35-44	456	23	440	22
45-60	624	31	600	30
61-74	462	23	427	21
75+	181	9	173	9
Gender				
Male	876	44	880	44
Female	1124	56	1120	56
Household composition				
One person household	471	24	466	23
Two person household	646	32	627	31
One parent family	127	6	126	6
Two parent family	706	35	729	36
Other	35	2	41	2
Meter use				
Meter users	780	39	741	37
Non users	1207	60	1242	62
Social grade				
A	88	4	78	4
B	364	18	322	16
C1	528	26	560	28
C2	426	21	441	22
D	218	11	234	12
E	247	12	245	12
Refused	129	7	120	6

APPENDIX B

THE QUESTIONNAIRE

FDS International Ltd
Hill House, Highgate Hill
London N19 5NA
Tel: 020 7272 7766 Fax: 020 7272 4468

C1	C2	C3	C4	C5	C6	C7
7	5	6	1			

Consumer Council for Water – 2008 Customer Satisfaction with Water Industry Services

INTRODUCTION

Good Morning/Afternoon, my name is… calling from FDS International on behalf of the Consumer body for the water industry. We are currently carrying out a research study amongst the public about water and sewerage services. Could you spare some time to answer some questions?

READ OUT IF NECESSARY
The survey should take around 15 minutes and is intended to help ensure that you get a good service from your water company.

We would like you to give your honest opinions as this is completely confidential and we can assure you that our discussion will be undertaken under strict market research codes of conduct.

	Col	Route
Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey:		
Q1. Are you the water bill payer in your household? INTERVIEWER INSTRUCTION: If respondent says that they pay their water bill as part of rent code as 2 (CLOSE). **SINGLE CODE**		
Yes	1	Q2
No	2	CLOSE
Don't know	3	
If no/don't know at Q1 ask if there is somebody else in the household who is the bill payer. If yes, interview that person. If no, thank and close		
Q2. And which of the following applies to the way you pay your bills… **READ OUT**		
Sole bill payer	1	
Jointly responsible for paying the bill		
- With spouse/partner	2	
- As part of shared house	3	
Other (specify)	4	
Don't know	5	

	Col	Route
Q3 Do you or any member of your family work in: **READ OUT**		
The water industry i.e. work for a water company	1	Thank and close
A consumer organisation e.g. Consumer Focus or Consumer Direct Which?, Citizens Advice Bureau	2	
Market Research	3	
None of the above	4	Q4
Q4a Who is your water company? (This may be a company which deals with your sewerage too.) **SINGLE CODE – PROMPT WITH HIGHLIGHTED COMPANIES IF NECESSARY**		
Anglian Water Services Ltd	1	Q4b
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	
Water only companies		
Bournemouth & West Hampshire Water Plc	11	Q4c
Bristol Water Plc	12	
Cambridge Water Company Plc	13	
Cholderton & District Water Company Ltd	14	
Dee Valley Water Plc	15	
Essex & Suffolk Water	16	
Folkestone & Dover Water Services Ltd	17	
Hartlepool Water Plc	18	
Mid Kent Water Plc	19	
Portsmouth Water Plc	20	
South East Water Plc	21	
South Staffordshire Water Plc	22	
Sutton & East Surrey Water Plc	23	
Tendring Hundred Water Services Ltd	24	
Three Valleys Water Plc	25	
Don’t know	99	All respondents to check and arrange call back
IF CODE 1-10 AT Q4A, ASK Q4B. Q4b And do they also provide your sewerage services, or do you have a septic tank?		
provide sewerage services	1	
Have septic tank	2	
Don’t know	3	

	Col	Route
IF CODE 11-25 AT Q4A, ASK Q4C.		
Q4c And who is your sewerage company? ADD IF NECESSARY: the bill from your water company will also say who provides your sewerage services. **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	
N/A – have septic tank	11	
Don’t know	12	
SECTION A COMPANY INFORMATION – ASK ALL		
I’d now like to ask you a few questions about your water [and sewerage] services.		
Q5 How far do you agree or disagree that the bill you receive for water your [and sewerage] service is clear and understandable? **SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don’t know	99	
Q6 How satisfied or dissatisfied are you with the value of money from the water services in your area? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don’t know	99	

		Col	Route
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q7 How satisfied or dissatisfied are you with the value for money from the sewerage services in your area? **SINGLE CODE**	Very satisfied	1	
	Fairly satisfied	2	
	Neither satisfied nor dissatisfied	3	
	Fairly dissatisfied	4	
	Very dissatisfied	5	
	Don't know	99	
ASK ALL DISSATISFIED (CODED 4 OR 5) AT Q6 AND/OR Q7 Q8 Why do you think you don't get value for money for your Water [and/or sewerage] services? **PROBE FULLY & WRITE IN**	Open (specify) ________________	1	Q9
	Don't know	99	
ASK ALL Q9 How satisfied or dissatisfied are you with the value for money from services such as…?: **READ OUT EACH SERVICE & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.*	a) Your energy supplier (gas and electricity)		
	b) Your telephone landline supplier		
	c) Council Tax		
ASK Q10 IF CODE IS HIGHER FOR 9a THAN Q6 Q10 Why do you say that you are more satisfied with the value for money from your energy supplier than the value for money for your water services? **PROBE FULLY & WRITE IN**	Open (specify) ________________		
	Don't know		
ASK ALL Q11 How much do you agree or disagree that the water [and sewerage] charges that you pay are fair? **SINGLE CODE**	Strongly agree	1	Q13
	Tend to agree	2	
	Neither agree nor disagree	3	
	Tend to disagree	4	Q12
	Strongly disagree	5	
	Don't know	99	Q13

	Col	Route
Q12 Why do you think that the water [and sewerage] charges that you pay are unfair? **PROBE FULLY & WRITE IN**		
Open (specify) ______________	1	
Don't know	99	Q13
ASK ALL Q13 How much do you agree or disagree that the water [and sewerage] charges that you pay for are <u>affordable to you</u>? **SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
SECTION B CONSUMER RIGHTS & RESPONSIBILITIES		
ASK ALL Q14 Were you aware that you can pay your water [and sewerage] bill in instalments e.g. monthly. fortnightly or weekly		
Yes	1	
No	2	
Don't know	3	
Q15 How likely would you be to contact your water company if you were worried about paying your bill? **READ OUT**		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	5	
Q16 Does your household have a water meter? **SINGLE CODE**		
Yes	1	Q16a
No	2	Q17
Don't know	99	Q17
Q16a Which of the following apply to you?		
Your property already had meter when moved in	1	
You asked for a meter to be fitted	2	
You had to have a meter fitted	3	
Other (specify)	4	
Don't know	5	

	Col	Route
Q17 Were you aware that …: **SINGLE CODE FOR EACH STATEMENT** Scale: 1=Yes, 2= No, 99= Don't know a) When requested, water meters are fitted free of charge b) If a water meter is fitted at your request, you have 12 months to decide whether or not you like it. If you decide you don't like it, you can go back to your original water rate charge for your property. There are no extra charges made for trialling this service.		
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 Q18 Are you aware of or are you currently on the WaterSure tariff? This was introduced to help people in low income groups who need to use a lot of water **READ OUT. SINGLE CODE** Yes, have heard of it but do not need it Yes, have subscribed to it No, but would like to know more No, but do not need it Don't know	 1 2 3 4 99	
INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them you can give them the telephone number for their water company at the end of the interview		
Q19 Are you aware of your water 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. SINGLE CODE** Yes, have heard of it but do not need it Yes, have subscribed to it No, but would like to know more No, but do not need it Don't know	 1 2 3 4 99	
INTERVIEWER NOTE: If respondent answers 'No, but would like to know more', then please tell them you can give them the telephone number for their water company at the end of the interview		

	Col	Route
Q20 Who do you think is responsible for maintaining the <u>water pipes</u> 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	1	
The Local Council	2	
The water company	3	
Other	4	
Don't know	99	
INTERVIEWER NOTE: If asked after taking response, the correct answer 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)		
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK)		
Q21 Who do you think is responsible for maintaining any <u>sewerage pipes</u> and drains at your property?		
DO NOT READ OUT. SINGLE CODE		
I am/the householder/landlord/organised through my insurance	1	
The Local Council	2	
The water/sewerage company	3	
Other	4	
Don't know	99	
INTERVIEWER NOTE: If asked after taking response, the correct answer is that the homeowner is responsible for the maintenance of sewerage pipes and drains at their home up to the point they meet the main sewer if the property was built after 1937.		
Q22 Were you aware that if your water [and/or sewerage] company fails to meet certain customer service standards for reasons within their control you may be entitled to compensation? **SINGLE CODE**		
Yes, was aware	1	
No, was not aware	2	
Don't know	99	
INTERVIEWER NOTE: If asked, information on service standards and the occasions when customers may be entitled to compensation can be obtained from your water company or their website		
Q23 How likely are you to read information provided by your water [and sewerage] company about the services you receive? (for example leaflets received with your bill)		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	5	

	Col	Route
Q24 Have you contacted your water [and/or sewerage] company to make an enquiry in the past 12 months? **SINGLE CODE**		
Yes	1	Q25
No	2	Q27
Don't know	99	
ASK IF YES AT Q24 Q25 Why did you contact them? **DO NOT READ OUT. MULTICODE**		
To make a complaint	1	
To make an enquiry relating to drought/water shortage	2	
To make an enquiry relating to flooding	3	Q26
Billing enquiry	4	
Other (please specify)	5	
Don't know	99	
Q26 Thinking about your contact with your water [and/or sewerage] company, overall how satisfied were you with: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT & SINGLE CODE**		
The ease of contacting someone who was able to help you	1	
The quality/ clarity of information provided	2	
The knowledge and professionalism of staff	3	
The feeling that your call had been, or would be, resolved	4	
The way that the water company has kept you informed of progress with your enquiry *(and /or)* claim	5	
DO NOT ASK THOSE CODED 1 AT Q25 Q27 Have you made a complaint to your water [and/or sewerage] company in the past 12 months? **SINGLE CODE**		
Yes	1	Q28
No	2	Q33
Don't know	99	

	Col	Route
ASK ALL CODED 1 AT Q25 AND ALL CODED 1 AT Q27 Q28 How satisfied were you with: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 99= don't know* **READ OUT EACH STATEMENT & SINGLE CODE** a) The speed of response to your complaint b) How well the company dealt with your concerns c)Action taken as a result of your complaint to prevent the problem re-occurring		Q29
Q29 Taking all those aspects into account, overall how satisfied or dissatisfied were you with the way your complaint was handled? **SINGLE CODE**		
Very satisfied	1	Q31
Fairly satisfied	2	Q31
Neither satisfied nor dissatisfied	3	Q30
Fairly dissatisfied	4	Q30
Very dissatisfied	5	Q30
Don't know	99	Q31
ASK ALL CODED 3,4 OR 5 AT Q29. OTHERS GO TO Q31. Q30 How would you have changed the way that your complaint was dealt with? **PROBE FULLY & WRITE IN**		
Please specify ________________________	1	Q31
Don't know	99	
ASK ALL CODED 1 AT Q24 or Q27. Q31 Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water [and/or sewerage] company? **SINGLE CODE**		
Very satisfied	1	Q33
Fairly satisfied	2	Q33
Neither satisfied nor dissatisfied	3	Q32
Fairly dissatisfied	4	Q32
Very dissatisfied	5	Q32
Don't know	99	Q33
ASK ALL CODED AS 3, 4 OR 5 AT Q31. OTHERS GO TO Q33 Q32 You weren't satisfied, please could you say why? **PROBE FULLY & WRITE IN**		
Please specify ________________________	1	
Don't know	99	

SECTION C – WATER ON TAP	Col	Route
ASK ALL Q33 How satisfied are you with the following aspects of your water supply: **READ OUT EACH STATEMENT & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.*		
The colour and appearance of your tap water	1	
Taste and smell of tap water	2	
Hardness/softness of your water	3	
The safety of your drinking water	4	
The reliability of your water supply	5	
Your water pressure	6	
Q34 Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your water supply? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
Q35 If you could make one single improvement to the overall water supply service provided by your water company what would it be? **PROBE FULLY & WRITE IN**		
Please specify	1	
Don't know	99	
Q36 Do you think that your water supply service has got better, worse, or stayed the same over the past year? **SINGLE CODE**		
Much better	1	
Slightly better	2	Q37
About the same	3	Q38
Slightly worse	4	Q37
Much worse	5	
Don't know	99	Q38
Q37 Why do you think the water supply service has been (better/worse)? **PROBE FULLY & WRITE IN**		
Please specify	1	Q38
Don't know	99	

	Col	Route
ASK ALL Q38 How satisfied or dissatisfied are you with services you receive from other organisations such as…?: **READ OUT EACH SERVICE & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* a) Your energy supplier (gas and electricity) b) Your telephone landline supplier c) Your local council		
ASK ALL Q39 Which of the following do you think is better for you? **READ OUT. SINGLE CODE**		
Tap water	1	
Bottled water	2	
Both equally as good for you	3	
Don't know	99	
Q39a How much do you agree or disagree that you usually drink tap water rather than bottled water? **READ OUT**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	6	
Q40What actions, if any, have you and your household taken to reduce your use of water? **DO NOT READ OUT. MULTICODE.**		
Having a water meter installed	1	
Taking showers instead of baths	2	
Water efficient shower/shower-head	3	
Energy & Water efficient dishwasher	4	
Energy & Water efficient washing machine	5	
Trigger device fitted to hosepipe	6	
Hippo/Save A Flush device in toilet cistern	7	
Lag pipes to protect against bursting	8	
Water butts in garden	9	
Turn off tap when brushing teeth	10	
Wait until full load for Washing Machine / dishwasher	11	
Only put required amount in kettle	12	
Reusing water e.g. bath water	13	
Share shower/bath	14	
Other (specify)	15	
Nothing	16	
Don't know	99	

	Col	Route
Q40a How have you been made aware, if at all, of any campaigns to use water wisely in the past 12 months? How were you made aware of campaigns to use water wisely? **READ OUT. MULTICODE.**		
Television	1	
Billboards	2	
Radio	3	
Leaflets	4	
Mail from water companies	5	
Newspapers/magazines	6	
Other (please specify)	7	
Not aware of any campaigns to use water wisely	8	
Don't know	99	
SECTION D – CLEANING UP		
Q41 Which of the following do you think are acceptable to dispose of down the toilet, sink or drain? **READ OUT. MULTICODE**		
Fats/cooking oils	1	
Nappies	2	
Sanitary towels	3	
Tampons	4	
Razors	5	
Cotton buds	6	
Condoms	7	
Motor oil	8	
Medicines	9	
None of these	10	
Don't know	99	
INTERVIEWER NOTE: If asked, none of these are acceptable		
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q42 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	1	
Goes direct to the sea	2	
Goes direct to rivers	3	
Nothing	4	
Other (specify)	5	
Don't know	99	
INTERVIEWER NOTE: If asked, waste water is cleaned at treatment sites, undergoing several stages of treatment so it is suitable to release back into the environment		

	Col	Route
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q43. How satisfied are you with your sewerage company's management of the following aspects of their sewerage service: *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT AND SINGLE CODE**		
a) Reducing smells from sewage treatment works		
b) Maintenance of sewerage pipes and treatment works		
c) Cleaning waste water properly before releasing it back into the environment		
d) Minimising sewer flooding		
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q44 Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service? **SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK) Q45 If you could make one single improvement to the overall sewerage service provided by your sewerage company what would it be? **PROBE FULLY & WRITE IN**		
Please specify	1	
____________________		
Don't know	99	
Q46 How much do you agree or disagree that your water [and sewerage] company cares about the service it gives to customers? **READ OUT. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	6	
Q46a How much do you agree or disagree that your gas and electricity company cares about the service it gives to customers? **READ OUT. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	6	

	Col	Route
Q47 How much do you trust your water [and sewerage] company. Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all		
Q48 How much do you trust your gas and electricity company. Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all		
Q48a Which of the following is more important to you? **READ OUT**		
Your water [and sewerage] bill being affordable	1	
Your water [and sewerage] company conducting its business ethically	2	
Both equally important	3	
Don't know	99	
SECTION E – SPEAKING UP FOR WATER CONSUMERS		
Q49 Who would you contact if you had a problem with your water [or sewerage] services? **DO NOT READ OUT. SINGLE CODE**		
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	
Q50 Do you know the name of the consumer body for the water industry? **DO NOT READ OUT – DO NOT PROMPT**		
Consumer Council for Water (CCWater)	1	
Ofwat	2	Q51
Other (specify)	3	
Don't know	99	
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER NOT NAMED AT Q50. OTHERS GO TO Q52		
Q51 Had you heard of the Consumer Council for Water before now?		
Yes	1	Q52
No	2	Q53
Don't know	99	Q53

	Col	Route
ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER MENTIONED AT Q50, OR CODED 1 AT Q51. OTHERS GO TO Q53		
Q52 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		
Q53 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		
Absolutely essential	1	
Very important	2	
Fairly important	3	
Not very important	4	
Not at all important	5	
Don't know	99	
Q54 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	1	
Email	2	
Telephone	3	
Via the CCWater website	4	
In person	5	
Other specify	6	
Don't know	99	
Q55 Have you had reason to contact the Consumer Council for Water in the last year?		
Yes	1	Q56
No	2	Q58
Don't know	99	Q58

	Col	Route
Q56 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	 1 2 3 4 5 99	 Q57
Q57 Thinking about your contact with the Consumer Council for Water, overall how satisfied were you with: *Scale: 1= very satisfied, 2= fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= fairly dissatisfied, 5= very dissatisfied, 6= don't know 7= not applicable.* **READ OUT EACH STATEMENT & SINGLE CODE** a) The ease of contacting someone who was able to help you b) The quality/clarity of information provided c) The knowledge and professionalism of staff d) The feeling that your call had been, or would be, resolved e) The way that the water company has kept you informed of progress with your enquiry *(and /or)* claim		Q58
ASK ALL AWARE OF CCWATER Q58 How much do you agree or disagree with the following statements about the Consumer Council for Water? *Scale 1=strongly agree, 2=tend to agree, 3=neither agree nor disagree, 4=tend to disagree, 5=strongly disagree, 99=don't know* **READ OUT EACH STATEMENT & SINGLE CODE** I have seen references to CCWater or CCWater press notices. I know how to contact CCWater if I have a problem or need advice. I rate CCWater as being effective in representing my views	 1 2 3	

SECTION F – BACKGROUND – ASK ALL		Col	Route
For all respondents:			
Q59 Please record the gender of the respondent **DO NOT ASK**			
	Male	1	
	Female	2	
Q60 Which of the following age groups do you fall into? **READ OUT SINGLE CODE**			
	18-24	1	
	25-34	2	
	35-44	3	
	45-60	4	
	61-74	5	
	75+	6	
	Refused	7	
Q61 How would you describe your ethnic background? **DO NOT READ OUT SINGLE CODE**			
	White: British	1	
	White: Irish	2	
	White: Any other White background	3	
	Mixed: White and Black Caribbean	4	
	Mixed: White and Black African	5	
	Mixed: White and Asian	6	
	Mixed: Any other Mixed background	7	
	Asian or Asian British: Indian	8	
	Asian or Asian British: Pakistani	9	
	Asian or Asian British: Bangladeshi	10	
	Asian or Asian British: Any other Asian background	11	
	Black or Black British: Caribbean	12	
	Black or Black British: African	13	
	Black or Black British: Any other Black background	14	
	Chinese	15	
	Other	16	
	Refused	17	
Q62 Do you have any long-term illness, health problem or disability which limits your daily activities or the work you can do?			
	Yes	1	
	No	2	
	Don’t know/refused	99	

	Col	Route
Q63 How would you describe the composition of your household? **READ OUT SINGLE CODE**		
One person household	1	
Married couple household	2	
Married couple with dependent children (under 16)	3	
Married couple with non-dependent children only (16+)	4	
Cohabiting couple household	5	
Cohabiting couple with dependent children (under 16)	6	
Cohabiting couple with non-dependent children only (16+)	7	
Lone parent household:		
- with dependent children (under 16)	8	
- with non-dependent children only (16+)	9	
other (specify)	10	
Refused	99	
Q64 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	1	
B – Senior managerial; business owners. Middle management in large organisations	2	
C1 – Small employers; junior management and other non-manual occupations	3	
C2 – Skilled manual workers e.g. served apprenticeships, special qualifications or certificates	4	
D – Semi skilled and unskilled workers	5	
E – Casual workers; unemployed and otherwise not working	6	
Refused	99	
Q65 What is the total annual income of your household (before tax) **READ OUT SINGLE CODE**		
Less than £10,000	1	
£10,000 - £19,999	2	
£20,000 – £29,999	3	
£30,000 - £39,999	4	
£40,000 - £49,999	5	
£50,000 - £59,999	6	
£60,000 or more	7	
Don’t know/refused	99	

	Col	Route
Q66 What type of accommodation do you live in? **READ OUT SINGLE CODE**		
Owner occupied	1	
Private rental	2	
Council tenant	3	
Housing Association tenant	4	
Leaseholder	5	
Don’t know/refused	99	
Q67 Would you say you live in an urban or rural area? **SINGLE CODE**		
Urban	1	
Rural	2	
Suburban/semi rural	3	
Don’t know	99	
Q68 Could I please take the first 4 digits of your post code?		

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 **or visit their website at www.ccwater.org.uk**

Should you want to contact the MRS (the Market Research Society) to verify that FDS International Ltd comply with the code of conduct you can call them on 0500 39 69 99.