# Annual Tracking Survey 2010

Report Prepared for:

CONSUMER COUNCIL FOR Water

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# CCWater Tracking Research 2010 Executive Summary

## 1. Understanding views

1.0.1 Understanding the views and opinions of consumers is essential for the effective delivery of the Consumer Council for Water's (CCWater) business objectives. An on-going understanding of consumers' views enables CCWater to continue to provide a strong voice for water consumers in England and Wales.

1.0.2 In 2006 CCWater undertook an initial survey of consumer views on water and sewerage services. From 2007-2009 FDS International continued this survey and in 2010 DJS Research was commissioned to undertake the project, building on previous results and tracking changes in the views of water and sewerage customers over time.

1.0.3 A total of 2012 telephone interviews were conducted with water and sewerage bill payers across England and Wales in December 2010. At least 200 interviews took place in each water and sewerage company region of England and Wales. Where reference is made to a region in the following findings, this is a water and sewerage company region rather than any other geographic or administrative unit.

1.0.4 This Executive Summary details some of the key findings from the 2010 survey. Where there are significant differences between 2010 and 2009 this is noted. The relevant paragraphs are shown in brackets at the end of each point:

### 1.1 Value for money

1.1.1 Almost three quarters of respondents (72%) say that they are satisfied with the value for money of their water services, and a similar proportion (73%) say that they are satisfied with the value for money of their sewerage services. (Paragraphs 3.1.1/3.2.1)

1.1.2 As in previous years, respondents in the South West are least satisfied with value for money (46% for water services, 53% for sewerage services). (3.1.5/3.2.5)

1.1.3 There is very little difference between the net satisfaction scores (those saying very and fairly satisfied) for water and sewerage companies (72% and 73% respectively) and energy suppliers (74%). (3.4.1)

1.1.4 Two thirds of customers (66%) feel that the charges they pay are fair and nearly one in five (19%) feel they are unfair. (3.5.1)

- However, in the South West of England only 39% of respondents feel their charges are fair. (3.5.4)

1.1.5 Three quarters of customers (75%) say that their bills are affordable and 14% feel they are unaffordable (3.6.1).

- In the South West, 62% consider their charges affordable and 25% feel they are unaffordable. This contrasts with Yorkshire region where 82% think their charges are affordable and 9% unaffordable. (3.6.2)

1.1.6 Four fifths of customers (81%) agree that their water and sewerage bill makes it clear how much needs to be paid and when. Slightly fewer (74%) agree that it is clear how the final amount of their bill was reached. (3.3.1/3.3.5)

## 1.2 Consumer rights and responsibilities

1.2.1 One in twenty respondents (5%) are aware of the WaterSure/Welsh Water Assist Tariff (this has decreased from 9% in 2009). (4.1.1)

- Awareness is highest in Wales and the Wessex region of England (both 9%) and lowest in the Northumbria region (1%). (4.1.3/4.1.4)

1.2.2 One in six respondents (18%) would like to know more about the WaterSure/Welsh Water Assist Tariff (this has increased from 13% in 2009). (4.1.2)

- This was highest in the Midlands region of England where 22% said they would like to know about the tariffs. (4.1.2)

1.2.3 One in eight respondents (13%) say that they are aware of their water company's services for elderly and/or disabled customers (this has decreased from 24% in 2009). (4.2.1)

1.2.4 One third (34%) of respondents have a water meter; respondents in the Eastern and South West regions are the most likely to be metered, and those in the North West and Northumbria the least likely. (4.3.1)

1.2.5 In this particular sample, significantly more customers of water only companies have a water meter than do customers of water and sewerage companies (46% compared with 33%). (4.3.2)

1.2.6 Levels of metering are significantly higher among older respondents and smaller households. (4.3.3/4.3.4)

- 59% of those aged 75+ and 39% of 61-75 year olds have a meter fitted in their property, compared with 28% of under 60's. (4.3.3)

- 47% of one person households have a meter fitted, compared with 39% of 2 person households, 32% of one parent families and 23% of two parent families. (4.3.4)

1.2.7 Over one third (35%) claim to be aware that under certain circumstances they may be entitled to compensation for service failures. This is significantly lower than in 2009 when it was 41%. (4.6.1).

- Awareness is highest in the South West of England (49%) (4.6.2)

1.2.8 Overall 9% of respondents say that they have contacted their water company to make an enquiry and 3% have made a complaint in the past 12 months. (4.7.1/4.8.1)

1.2.9 Of these, 70% say that overall they are satisfied with the contact with their water company. (4.9.1)

### 1.3 Water on tap

1.3.1 Respondents are very satisfied overall with their water supply (94%) (5.1.6).

1.3.2 There are also high levels of satisfaction for all aspects of water supply, with customers most satisfied with the reliability of their water supply (97%) and least satisfied with the hardness/softness of their water (68%). (5.1.1)

- There are wide ranging regional variations in satisfaction with hardness/softness of water which are likely to reflect regional differences in the type of tap water people receive. Satisfaction ranges from 52% in Thames region to 87% in Wales and the North West of England. (5.1.3)

1.3.3 Less than half of respondents (47%) say they have seen publicity campaigns designed to encourage people to use water wisely over the past year. (5.5.1)

1.3.4 Three quarters (76%) say that they have taken specific actions, including having a water meter fitted, to reduce their use of water over the past year (this has increased from 70% in 2009). This means that nearly one in four respondents (24%) did not report doing anything to use water wisely. (5.3.1)

1.3.5 The proportion of households reporting no water saving activity increases from 24% to 27% when respondents who gave having a water meter fitted as their *only* water saving activity are excluded from the proportion actively reducing their use of water. (5.4.1)

1.3.6 After excluding those who gave having a water meter fitted as their *only* water saving activity, 27% of metered households and 26% of unmetered households did not report undertaking any water saving activities. (5.4.2)

### 1.4 Clearing up (sewerage services)

1.4.1 Just over nine in ten (91%) respondents say that overall they are satisfied with their sewerage services, compared with 87% in 2009. Only 3% say that overall they are dissatisfied with their sewerage services. (6.2.1)

1.4.2 Satisfaction with different elements of sewerage services has increased over the past year and comparatively few (between 4% and 7%) are dissatisfied with any aspect of their sewerage services. (6.2.1)

1.4.3 There is confusion among one fifth of customers (20%) about what can be disposed of down the toilet, sink or drain, however, this has fallen from 29% in 2009. (6.1.1)

## 1.5 Comparisons with other utilities

1.5.1 Overall satisfaction for water and sewerage companies and landline suppliers has changed very little since 2008 and levels of satisfaction with water and sewerage companies, energy suppliers and landline suppliers are almost aligned this year (88% water & sewerage company compared with 89% energy supplier and 88% landline supplier) (7.3.1).

1.5.2 Respondents are more likely to think that their water and sewerage company cares about the service it gives them (64%) than their energy company does (61%). But the difference in this perception of the water and energy sectors is getting smaller each year. (7.1.1)

1.5.3 Trust in energy suppliers has increased. However customers still place significantly more trust in their water and sewerage company. (7.2.2)

## 1.6 Differences in results between Wales and the English regions

1.6.1 When comparing overall results for customers in Wales against all of the English regions collectively, the overall picture is very similar. However, there are some minor differences in customers' views:

- Respondents in Wales are more likely to be aware of the WaterSure/Welsh Water Assist tariff (9% compared with 5% in England). (4.1.3)

- Respondents in Wales are more likely to be aware of the compensation entitlement should their water and/or sewerage company fail to meet certain customer service standards for reasons within their control (44% compared with 34%). (4.6.3)

- Respondents in Wales are less likely to take action to reduce water usage (69% compared with 77%[1]). (5.3.3)

## 1.7 Next steps

1.7.1 To be effective, CCWater needs to represent all water consumers, and have an understanding of how customers view water and sewerage services; the companies that provide these services; and other areas of policy/activity within the water industry which ultimately affect consumers and the bills that they pay.

1.7.2 CCWater will use the findings of this research to:

– Maintain our full understanding of customers' views about all aspects of water and sewerage services.

[1] These figures include respondents who gave having a meter fitted as their only water saving action.

- To highlight where we need to work with the water industry on areas of service where there is potential for improvement in customer perceptions or customer knowledge.

- Help identify where our activities with the water industry have made a difference to customers' perceptions.

- Help CCWater make sure its communications are right.

# 2 Introduction

2.0.1 The Consumer Council for Water (CCWater) was set up in 2005 to represent the interests of consumers in the water and sewerage industry of England and Wales. The water industry is different from other utilities in that, as far as household customers are concerned, it is a regional monopoly and there is no choice of supplier. However, it is also a highly regulated industry in terms of the standards it has to meet (for example, EU standards on the quality of drinking water) and the prices it is allowed to charge customers.

2.0.2 Understanding the views and opinions of consumers is central to the effective delivery of CCWater's business objectives, and to enable the organisation to continue to provide a strong national voice for water industry consumers in England and Wales.

2.0.3 To be effective, CCWater needs to represent all water consumers, and have an understanding of how customers view water and sewerage services; the companies that provide these services; and other areas of policy/activity within the water industry which ultimately affect consumers and the bills that they pay.

2.0.4 In 2006 CCWater undertook an initial survey of consumer views. From 2007 to 2009 FDS International continued this survey and in 2010 DJS Research was commissioned to undertake the project, building on previous results and tracking changes in the views of water and sewerage customers over time.

## 2.1 Research Aims

2.1.1 The tracking research is designed to identify customer views on their water and sewerage services in order to provide an impartial, consistent and justifiable platform on which CCWater can base its future policy and activity.

2.1.2 The main objectives of this research are to:-

- Understand customers' views about all aspects of water and sewerage services.
- Measure how customers' views change over time.
- Determine where CCWater has added value or made an impact by measuring service provision and consumer perception of CCWater's impact and performance.
- Help CCWater develop an effective communications strategy.

## 2.2 Approach

2.2.1 To be consistent with previous tracking surveys, a quantitative methodology was followed, using telephone interviewing to survey a random representative sample of households across England and Wales.

## 2.3 Fieldwork

2.3.1 The study was carried out using CATI (Computer Aided Telephone Interviewing) from DJS's in-house telephone unit.

2.3.2 A total of 2,012 interviews were achieved across England and Wales. Interviewing took place in December 2010.

## 2.4 Sample

2.4.1 A random digit dialling (RDD) sample of residential telephone numbers across England and Wales was purchased from a DJS approved supplier, Sample Answers.

2.4.2 Interview quotas were set on water and sewerage company region and age of respondents. The sample was stratified by water and sewerage company region to ensure robust numbers were achieved for each of the ten regions, i.e. an equal number of interviews were achieved for each water region to enable sub-group analysis, rather than setting targets proportionate to the size of their customer base. We set a quota of 200 respondents for each of the nine water and sewerage company regions in England and 200 for Wales. Respondents were screened to ensure that we only interviewed householders who were solely or jointly responsible for paying the water and sewerage bill.

2.4.3 The 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 of individuals.

## 2.5 Questionnaire

2.5.1 In order to understand how customers' views and opinions have developed over time, it was important to maintain a great degree of consistency with the questionnaires used in previous years. Therefore, the 2010 questionnaire is largely based on previous surveys undertaken.

2.5.2 The questionnaire was further developed in liaison with CCWater, and additional questions were included.

2.5.3 As in previous years, the questionnaire focused on the following five key themes:

- Value for money.
- Consumer rights and responsibilities.
- Water on tap.
- Clearing up.
- Speaking up for water consumers.

2.5.4 The interviews lasted for around 20 minutes and a copy of the questionnaire has been appended for reference.

## 2.6 Data processing and computer tables

2.6.1 Weighting has been applied to the data to ensure that it is representative of household water customers. With a stratified sample (as explained in paragraph 2.4.2), to enable analysis by water region, weighting was required to correct this deliberate unequal distribution of customers. A sample profile is included in the Appendix which shows the actual number of interviews achieved against the weighted data.

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

## 2.7 Interpretation of data

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

2.7.2 Where percentages do not add to 100, this may be due to 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.

2.7.3 The table below shows the statistical reliability of results for a total base sample size of 2,000 and 200 (the number of interviews achieved per region):

**Table 1 Statistical reliability**

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

2.7.4 Differences between social grades are highlighted throughout the report. Social grade is established by asking respondents about their current or previous occupation (if retired) and below is a brief guide to these grades:-

- A Professional, very senior managers in business or commerce or top-level civil servants.
- B Middle management, principal officers in civil service, top managers or owners of small businesses.
- C1 Junior management, owners of small establishments and all others in non-manual positions.
- C2 All skilled manual workers and manual workers with responsibility for other people.
- D All semi-skilled and un-skilled manual workers, apprentices and trainees to skilled workers.
- E All those entirely dependant on the state long-term, through sickness, unemployment (for a period of longer than six months), old age or other reasons. This group also includes casual workers and those without a regular income.

2.7.5 Throughout the report, we have also highlighted differences between sub-groups of respondents and between 2009 and 2010 results where they are statistically significant.

# 3. Value for money

3.0.1 Customers were asked for their opinions on a number of issues relating to value for money. This includes billing, value for money from a range of different services, and affordability and fairness of water and sewerage bills.


**Summary**

- Almost three quarters of respondents (72%) say that they are satisfied with the value for money of their water services, and a similar proportion (73%) say that they are satisfied with the value for money of their sewerage services.

- Customers in the South West of England continue to be the least satisfied with the value for money of their water (46%) and sewerage services (53%).

- Two thirds of customers (66%) feel that the charges they pay are fair and three quarters (75%) say that their bills are affordable. This is similar to 2009 when 62% considered their charges to be fair, and 74% affordable.

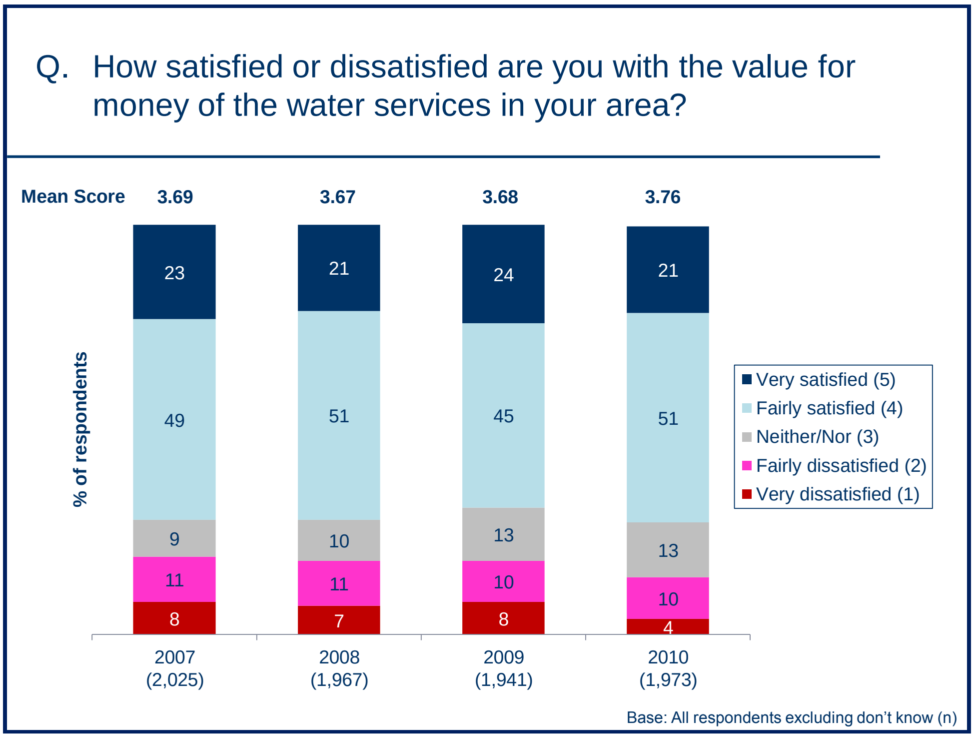
- Encouragingly, four fifths of respondents (80%) would be likely to contact their water company if they were worried about paying their bills. This has increased by 7% in the last year. However, a significantly lower proportion (64%) of Black and Minority Ethnic (BME) respondents said they would be likely to make contact than non-BME respondents (83%).

- Four fifths of customers (81%) agree that their water and sewerage bill makes it clear how much needs to be paid and when. Slightly fewer (74%) agree that it is clear how the final amount of their bill was reached. Customers of water only companies perceive their bills to be clearer than customers of water and sewerage companies.

### 3.1 Value for money from water services

3.1.1 Almost three quarters of respondents (72%) say they are satisfied with the value for money of their water services. As shown in the chart below, this is very consistent with previous years (in 2009 the figure was 69%).

#### Chart 3.1 Satisfaction with value for money of water services



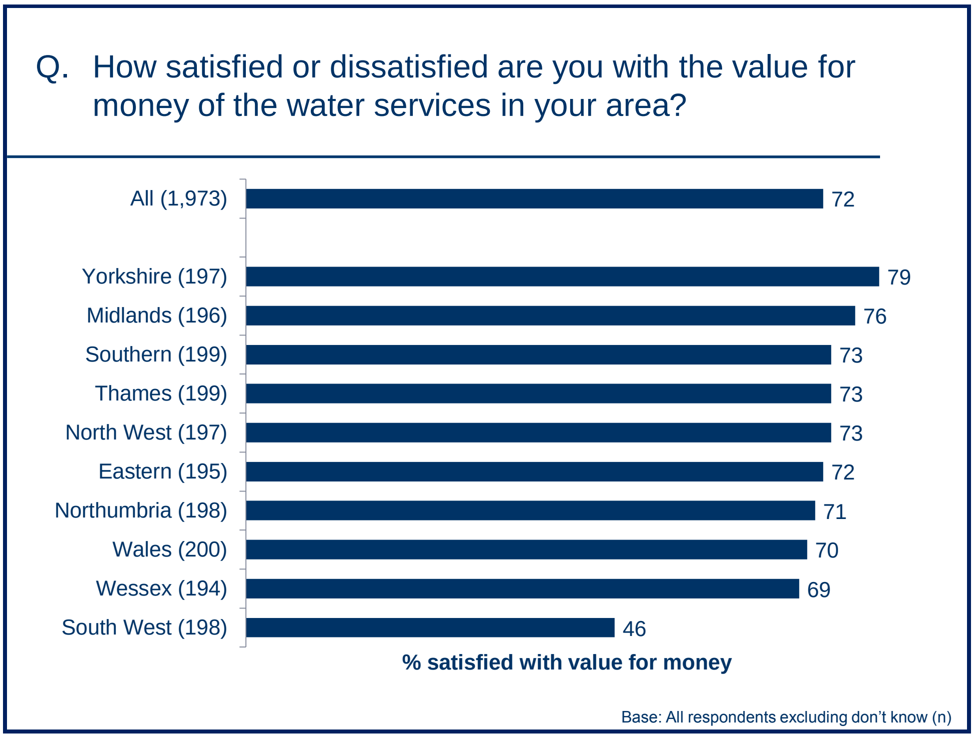

3.1.2 There is a correlation between satisfaction with water supply and satisfaction with value for money of water services. Of those who are satisfied with the value for money of their water services, 75% are also satisfied with their water services, and just 23% are dissatisfied with their water services. Similarly, customers who are satisfied with their sewerage services are also more likely to be satisfied with value for money than those who are dissatisfied (75% compared with 45%). (Section 5)

3.1.3 Respondents who have made a complaint or an enquiry of their water company are significantly less satisfied with value for money than those who have not (57% who have made an enquiry compared with 74% who have not, 55% who have made a complaint compared with 73% who have not). This has been observed in all tracking surveys since 2007.

3.1.4 Respondents who have someone in their household with a long-term illness, health problem or disability are significantly less satisfied with the value for money of their water services than those who do not (66% compared with 74%).

3.1.5 When analysed by region, there are distinct differences in the perceived value for money of water services. Respondents in the South West are significantly less likely to be satisfied with the value for money from their water services (46% are satisfied, 41% dissatisfied). Although satisfaction levels are consistent with 2007 and 2008 results, it is an improvement on 2009 when 39% were satisfied with value for money of water services.

**Chart 3.2 Satisfaction with value for money of water services by region**




3.1.6 Dissatisfaction among customers in the South West features on other questions. This is likely to be because the South West has the highest average bills for water and sewerage services in England and Wales.

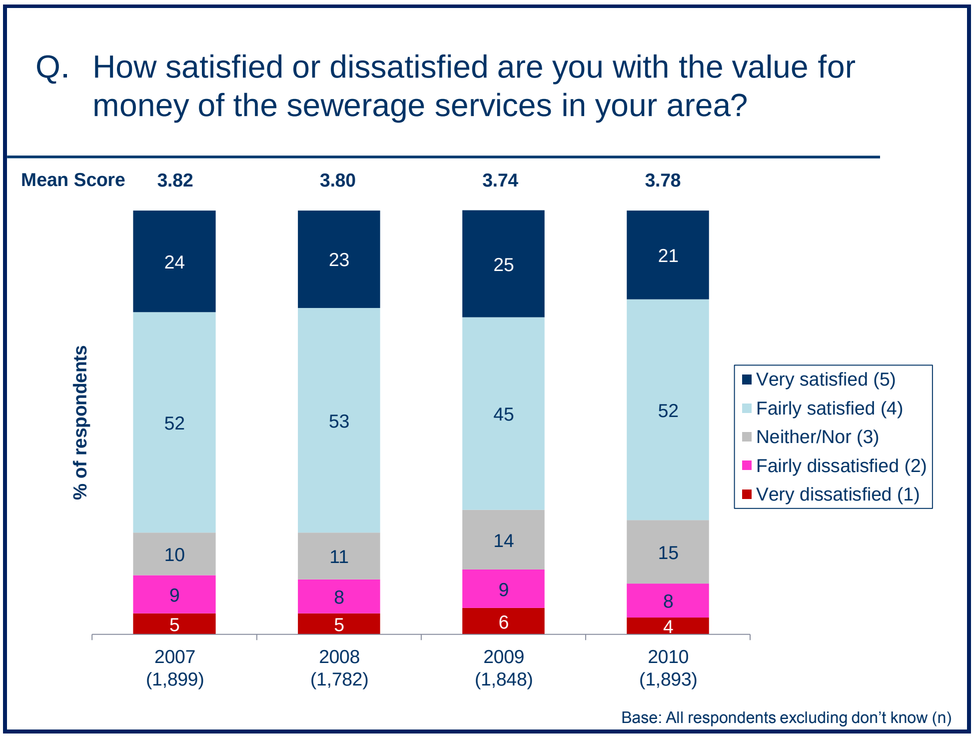
3.1.7 Respondents in Yorkshire are most likely to say that they are satisfied with the value for money from their water services.

3.1.8 There have been no significant changes in satisfaction levels by region since the 2009 survey. However, it is notable that between 2007 and 2009, customers in Northumbria were the most satisfied with the value for money from their water services. In 2010 satisfaction for Northumbria was 71%, a fall from 79% in 2009.

### 3.2 Value for money from sewerage services

3.2.1 Satisfaction with value for money from sewerage services is on a par with water services, with 73% saying that they are satisfied. There has been a fall in net dissatisfaction from 15% in 2009 to 12% this year, but otherwise the picture is consistent with last year.

**Chart 3.3 Satisfaction with value for money of sewerage services**



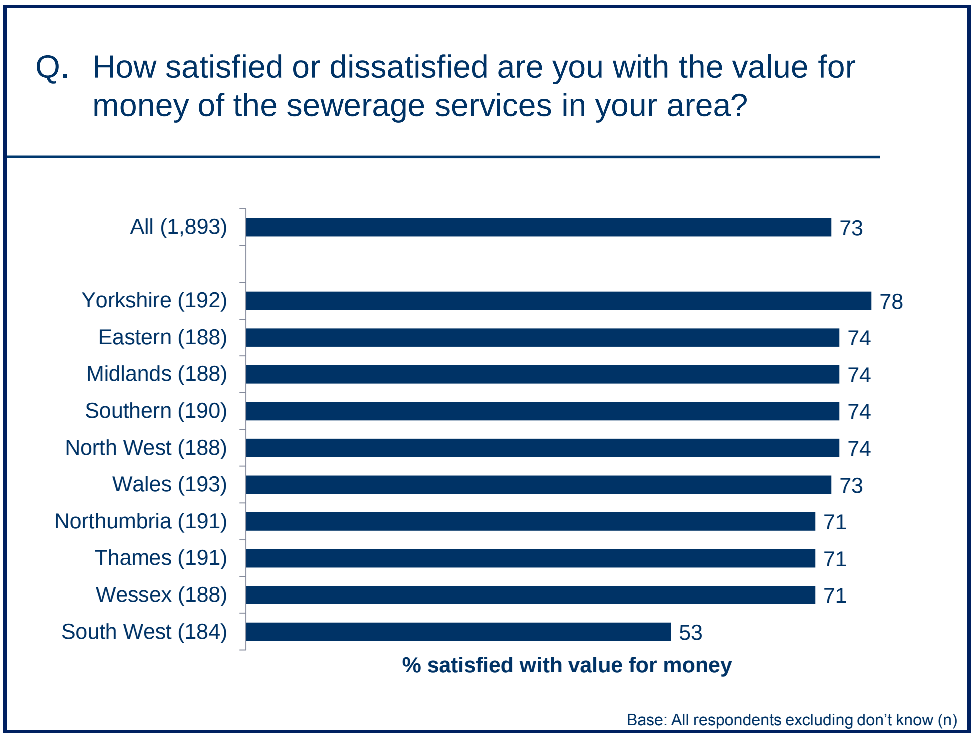

3.2.2 Differences in sub-groups follow a similar pattern as for satisfaction with value for money of water services. Respondents who are satisfied with the value for money of sewerage services are also more likely to be satisfied overall with their sewerage services.

3.2.3 This is also true for respondents who have made an enquiry or a complaint to their water company. Those who have had no contact with the water company are significantly more satisfied with the value for money of their sewerage services than those who have had contact (74% compared with 57% who have made an enquiry, 74% compared with 53% who have made a complaint). This has been found in previous tracking surveys.

3.2.4 As is the case for satisfaction with value for money of water services, respondents who have someone in their household with a long-term illness, health problem or disability are significantly less satisfied with the value for money of their sewerage services than those who do not (68% compared with 74%).

3.2.5 Differences by region for satisfaction with value for money of sewerage services show the same pattern as for 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 (53%) and respondents in Yorkshire are the most likely to be satisfied (78%).

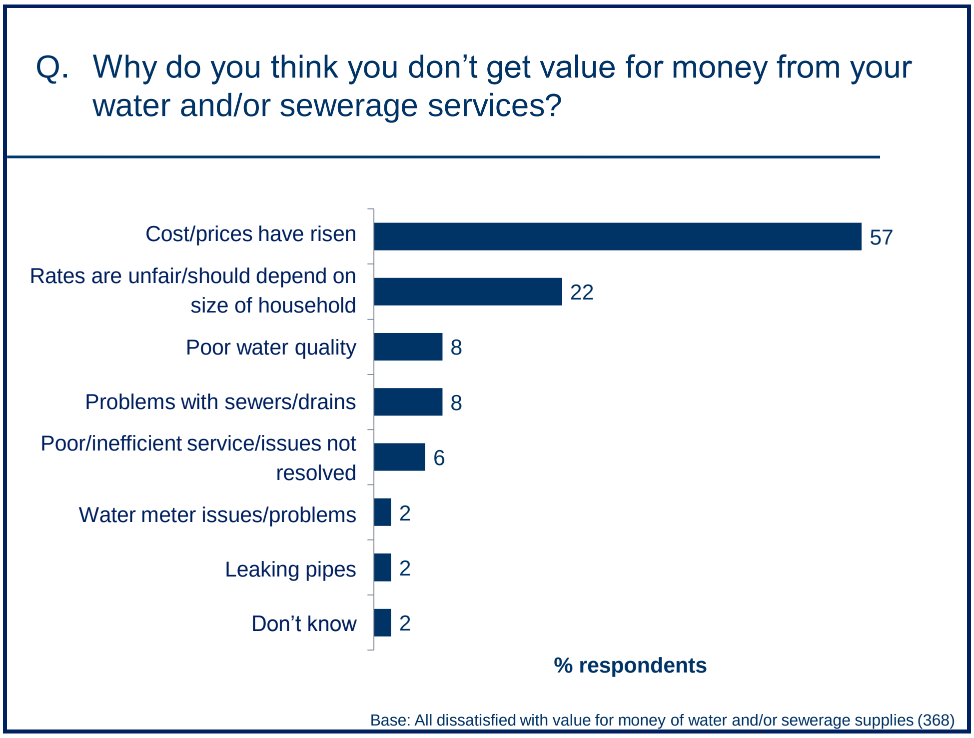
**Chart 3.4 Satisfaction with value for money of sewerage services by region**




3.2.6 Customers in Northumbria have previously been most satisfied with the value for money from their sewerage services (from 2007 to 2009) but there has been a significant fall in satisfaction levels amongst customers in this area, with overall satisfaction with value for money of sewerage services falling from 80% in 2009 to 71% in 2010.

3.2.7 The main reason that customers are dissatisfied with the value for money from their water and/or sewerage supplier is because of price or rising costs (57%). Just over one fifth of those dissatisfied with value for money (22%) raise the issue of fairness, saying that rates are unfair or that charges should depend on household size. This is a very similar picture to last year.

**Chart 3.5 Reasons why water/sewerage services are not good value for money**




3.2.8 Respondents in the Southern and South West regions are the most likely to say that they are dissatisfied due to cost or price increases (73% and 72%).

3.2.9 Customers in the Northumbria and Thames regions are the most likely to say that problems with sewers and drains are the cause of their dissatisfaction (23% and 20%).

3.2.10 In terms of household composition, one person households are the most likely to say that they are dissatisfied due to cost or price increases (70% compared with around 55% for two person/one parent/two parent families and 'other' households). Almost three-quarters (73%) of one person metered households give this as a reason, compared with 68% of one person unmetered households.

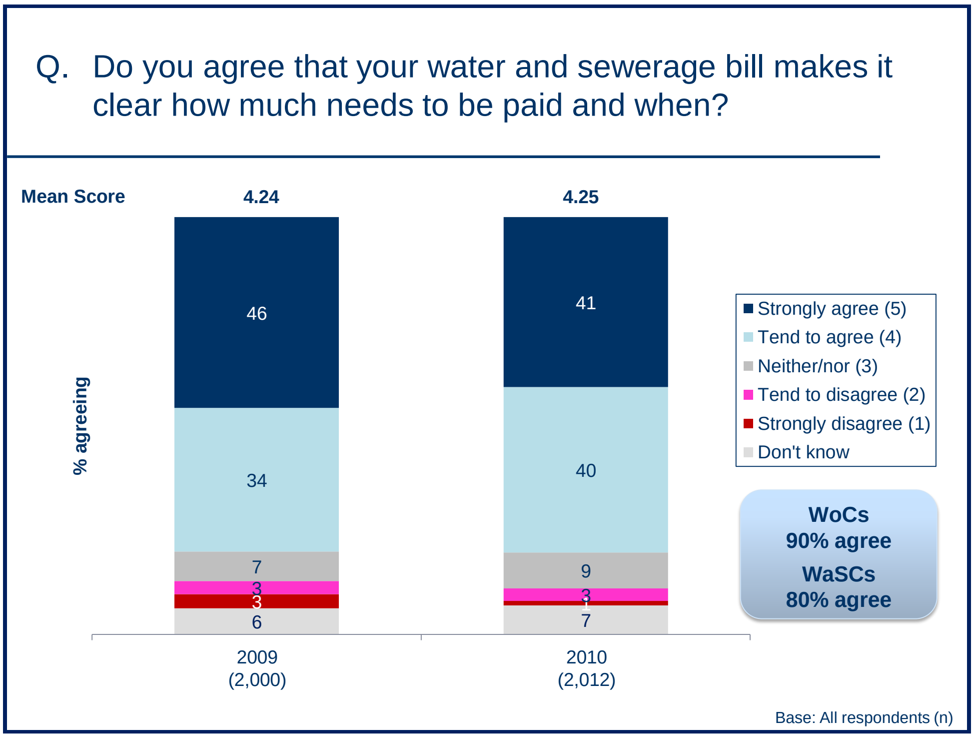
3.2.11 There are also differences by social grade. Overall, 57% of those dissatisfied with value for money say this is because of cost or price increases, but this rises to 70% among AB respondents. They are also most likely to say that rates are unfair/(charges) should depend on household size (23% overall, 32% AB). Service issues are more prevalent amongst respondents in the DE social grade than any other (9% DE, 3% AB, 2% C1, and 7% C2).

## 3.3 Clarity of water and sewerage bills

3.3.1 Four-fifths of customers (81%) agree that their water and sewerage bill makes it clear how much needs to be paid and when, 4% disagree and 9% neither agree nor disagree. Seven per cent said 'don't know'.

3.3.2 Customers of water only companies (WoCs) are significantly more likely than customers of water and sewerage companies (WaSCs) to agree that the bill makes it clear how much needs to be paid and when (90% compared with 80%).

**Chart 3.6 Agreement that the water and sewerage bill makes it clear how much needs to be paid and when**



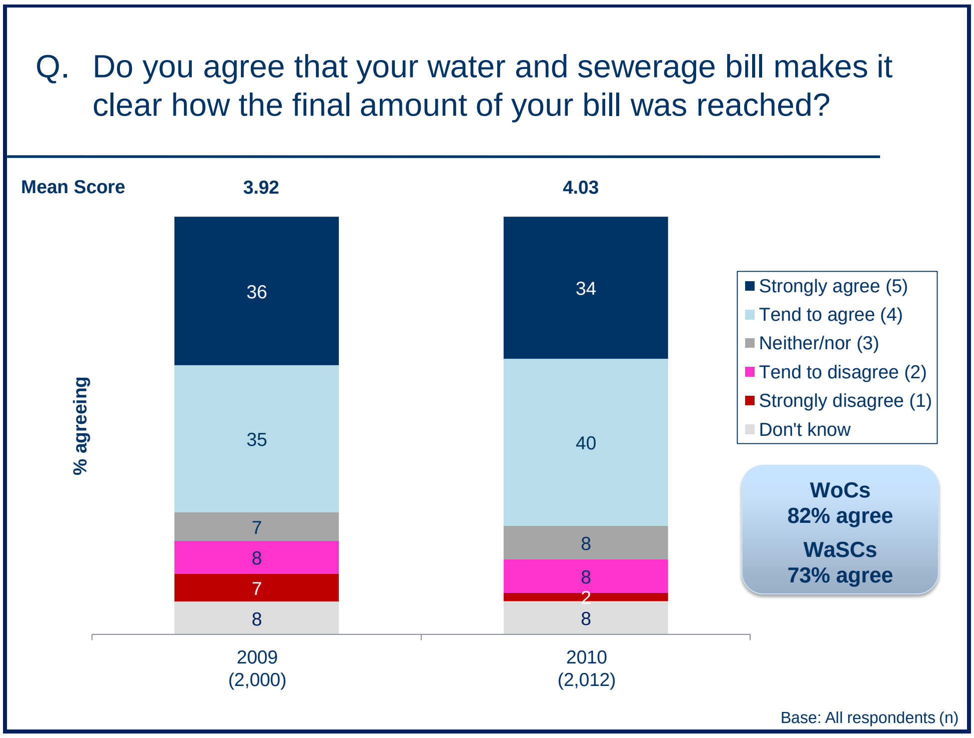

3.3.3 Those with a disability or long-term health condition are significantly less likely to say that the bill makes it clear how much needs to be paid and when (76% compared with 82% who do not fall into this category).

3.3.4 Respondents who are satisfied with the value for money of their sewerage service are significantly more likely to agree that their water and sewerage bill makes it clear how much needs to be paid and when (83% compared with 71% dissatisfied with value for money of sewerage services).

3.3.5 Whilst 81% of respondents find the amount payable clear, a smaller proportion – 74% - feel it is clear how this amount is reached.

3.3.6 Customers of water only companies are significantly more likely than water and sewerage company customers to agree that it was clear how the final amount of their bill was reached (82% compared with 73%).

**Chart 3.7 Agreement that the water and sewerage bill makes it clear how the final amount of the bill was reached**




3.3.7 The following groups of respondents are significantly less likely to agree that their water and sewerage bill makes it clear how the amount payable was reached:

- Those who have made a complaint to their water company (55%) compared to those who have not (74%).

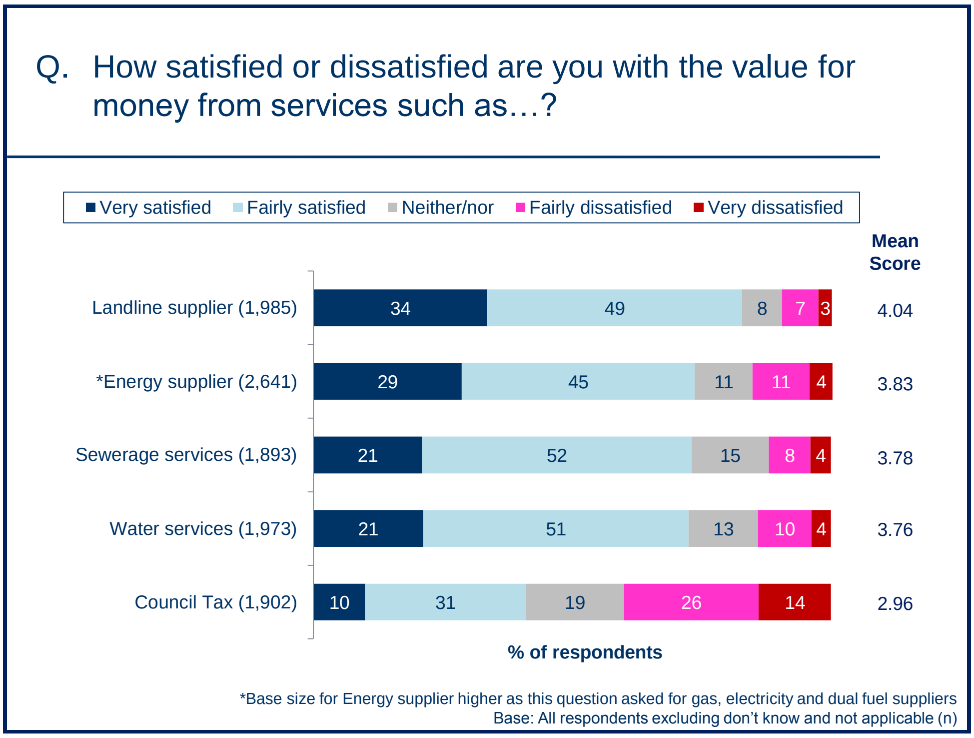
- Respondents who have a disability or long-term health condition (68%) compared to those who do not (74%).

- Respondents from black and minority ethnic groups (BMEs) 52% compared to 74% of other respondents.

### 3.4 Comparative value for money from different services

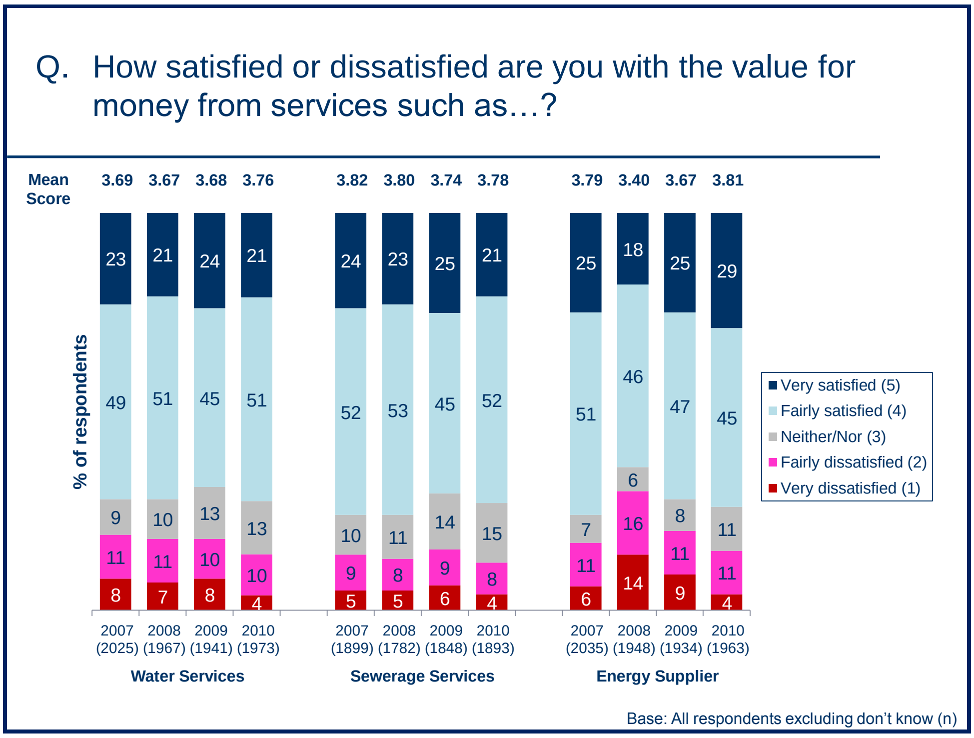
3.4.1 Respondents are most likely to be satisfied with the value for money provided by landline telephone suppliers (83%), followed by energy companies (74%), sewerage services (73%) and water services (72%). As in previous years, respondents are least satisfied with value for money from their council tax (41% say they are satisfied) and this satisfaction level is declining over time.

**Chart 3.8 Satisfaction with value for money from different services**



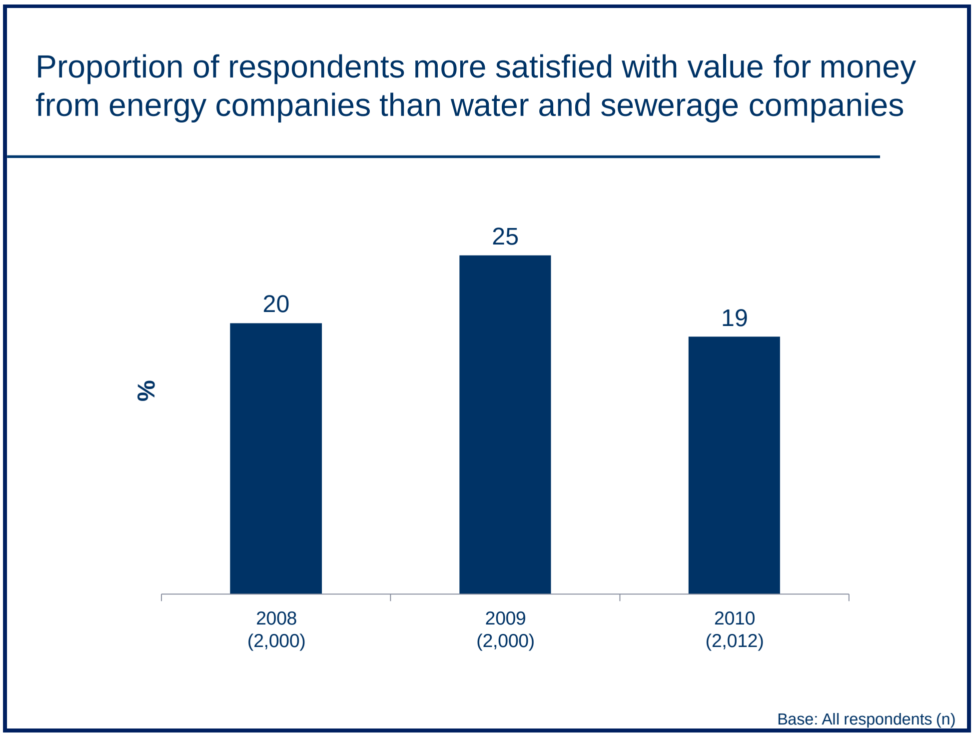
3.4.2 As can be seen from the chart below, since 2009 satisfaction with value for money has increased for water services, sewerage services and significantly for energy suppliers. However, care should be taken when interpreting this result as the question was asked of gas, electricity and dual fuel suppliers separately in 2010, whereas previously the question was asked of energy suppliers as a whole which means that findings are not directly comparable.

**Chart 3.9 Satisfaction with value for money from different services over time**



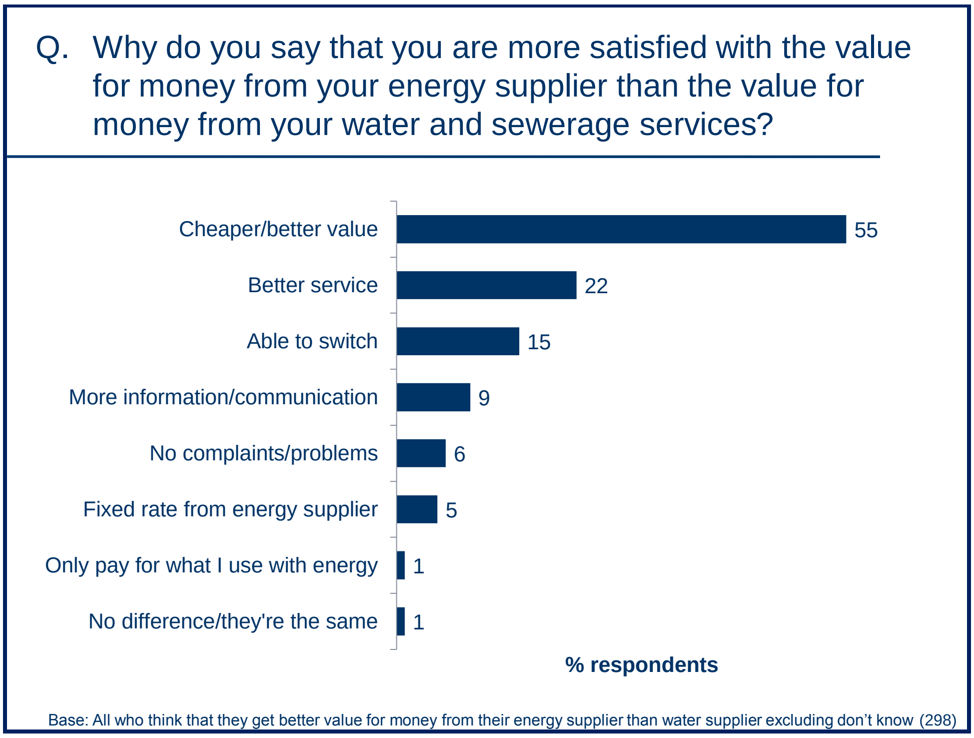
3.4.3 A fifth of respondents (19%) feel that they get better value for money from their energy supplier than from their water supplier. This has decreased from 25% in 2009.

**Chart 3.10 Proportion of respondents more satisfied with value for money from energy supplier than their water and/or sewerage supplier**



3.4.4 The main reasons why energy suppliers are perceived as better value than water suppliers is that they are cheaper (55%) or they provide a better service (22%). A further one in seven (15%) say they are better value because they are able to switch their energy suppliers, thus taking advantage of the competitive marketplace. Other customers state that they get more information/communication from their energy supplier (9%) or that they have had no complaints/problems (6%).

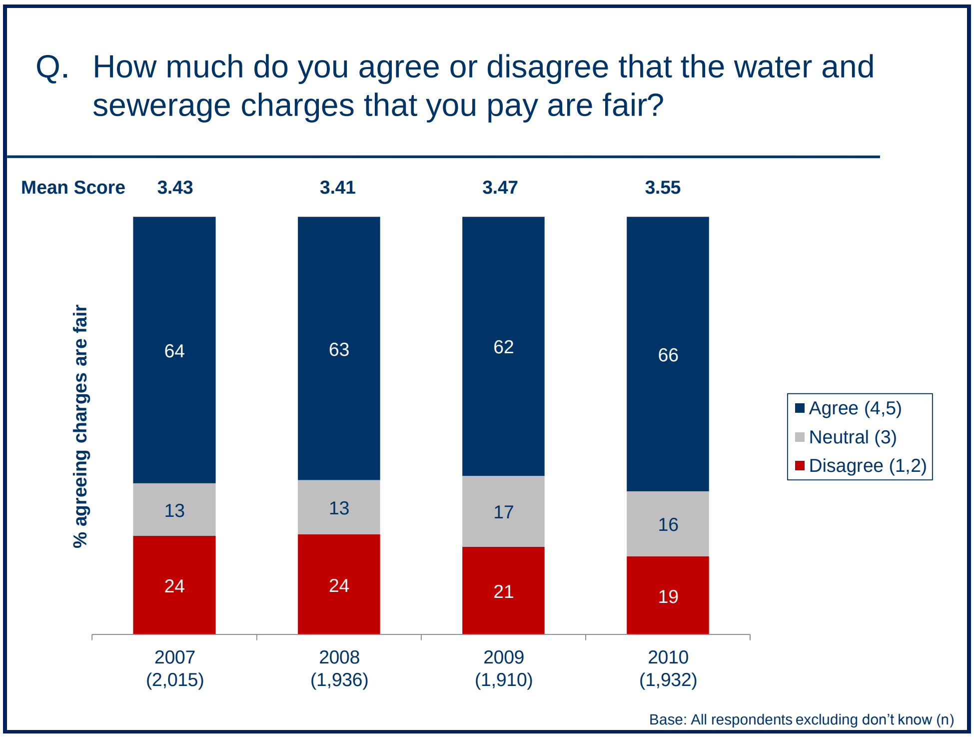
**Chart 3.11 Reasons customers think that their energy supplier represents better value for money than their water and/or sewerage supplier**



### 3.5 Fairness of water and sewerage charges

3.5.1 Overall, two thirds (66%) of respondents agree that the water and sewerage charges they pay are fair and nearly a fifth (19%) disagree. As the following chart shows, perceptions of fairness have been quite consistent over the past four years.

**Chart 3.12 Agreement that water and sewerage charges are fair**

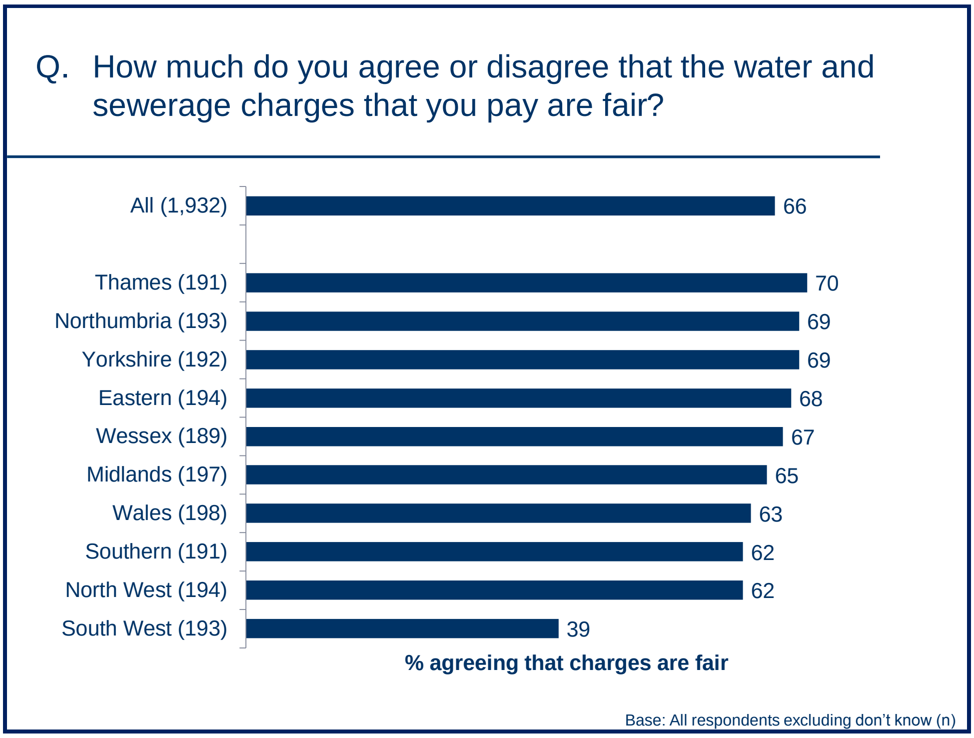



3.5.2 Whilst there are no significant differences in perceptions of fairness between the different demographic profiles, respondents with a disability or long-term health condition are less likely to agree that charges are fair (60% compared with 68%).

3.5.3 Respondents are more likely to agree that charges are fair if they are satisfied with the value for money from their water services (80% compared with 15% who are dissatisfied) and their sewerage services (79% compared with 15%).

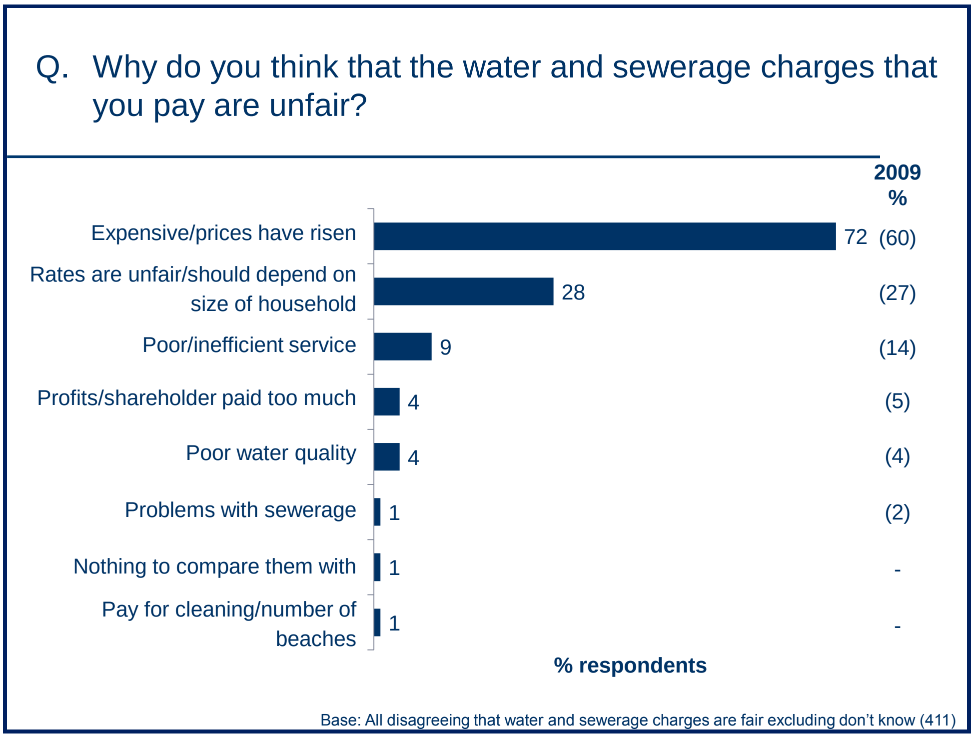
3.5.4 As is the case for value for money, respondents in the South West region, which has the highest average water and sewerage bills in England and Wales, are least likely to agree that the charges they pay are fair (39% agree compared to 50% who disagree). The proportion agreeing that the water and sewerage charges are fair in the South West region has however increased from 32% last year. Other notable increases are for Thames (63% to 70%) and Wessex (59% to 67%).

**Chart 3.13 Agreement that water and sewerage charges are fair by region**



3.5.5 The majority of those who think their water and sewerage charges are unfair link this perception to cost rather than to service (72% say it is because it is expensive/prices have risen). The proportion with this view has increased significantly since 2009 when it was 60%. Over a quarter (28%) say it is because rates are unfair and/charges should depend on household size. Respondents in the Midlands area are most likely to say this (41%).

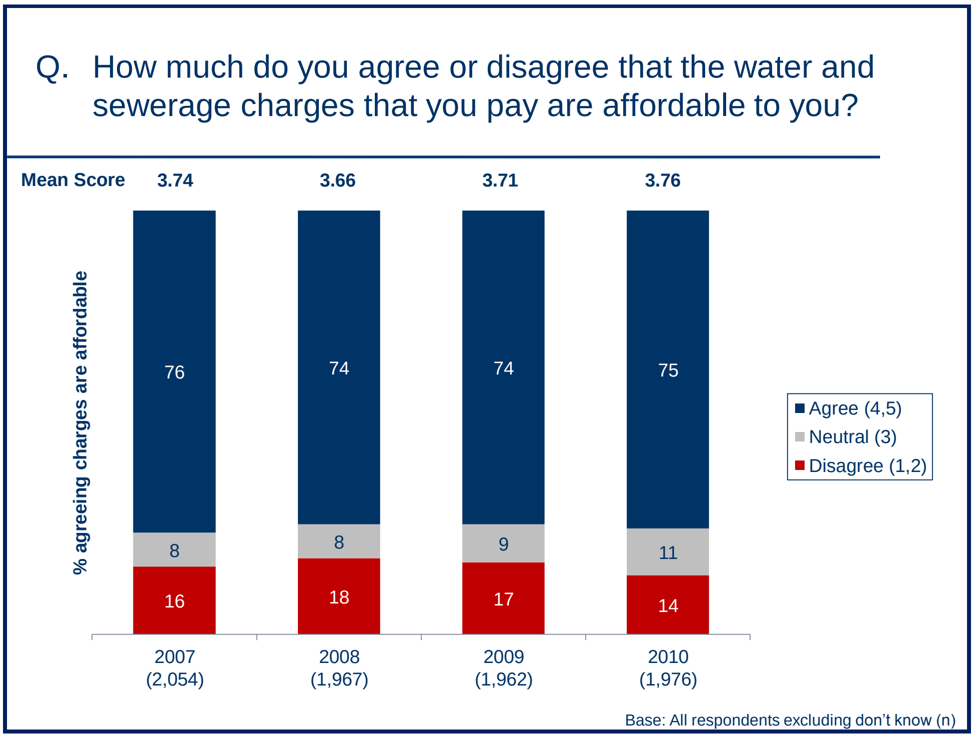
### Chart 3.14 Reasons why water and sewerage charges are unfair



### 3.6 Affordability of water and sewerage charges

3.6.1 Whilst 66% agree that their bills are fair, a significantly higher proportion say that their bills are affordable (75%) and this is consistent with previous years' findings. The proportion saying that their charges are unaffordable has also fallen from 17% in 2009 to 14% in 2010.

**Chart 3.15 Agreement that water and sewerage charges are affordable**



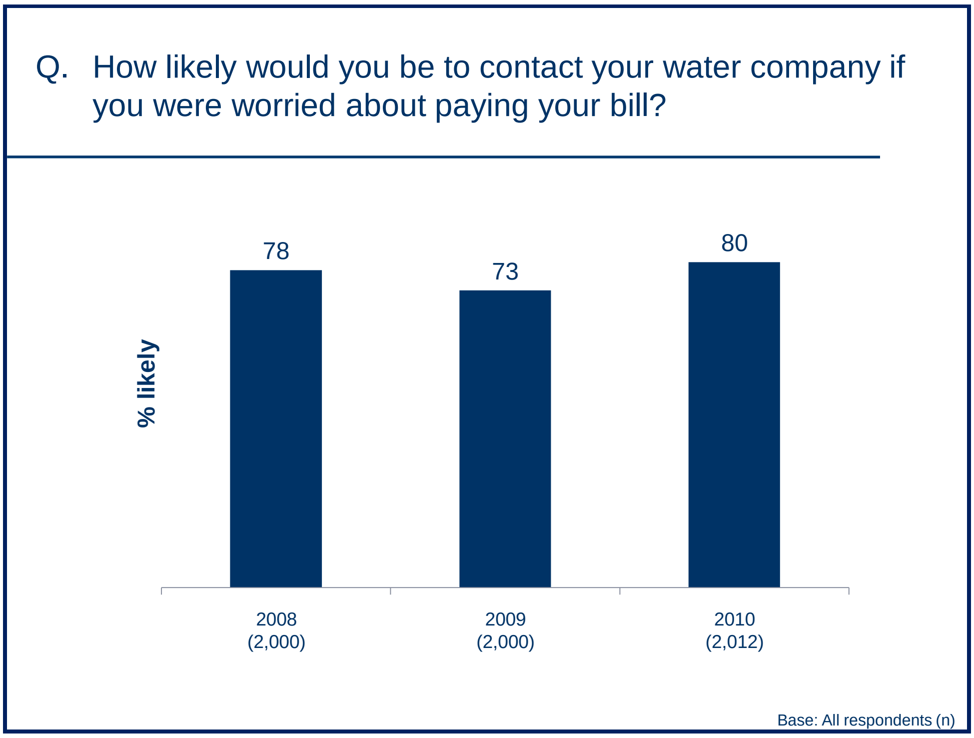

3.6.2 As was the case with value for money and fairness of charges, respondents in the South West are the least likely of the regions to agree their bills are affordable (62% agree and 25% disagree). Agreement has, however, risen from 50% in 2009. In contrast, 82% of respondents in Yorkshire, the highest for all of the regions, consider their charges to be affordable while 9% feel they are unaffordable.

3.6.3 Respondents of lower social grades are significantly more likely to disagree that their charges are affordable than those of higher grades (19% of DE's compared with 9% of AB's, 11% C1's and 11% C2's).

3.6.4 Metered customers are significantly more likely to agree that their bills are affordable than unmetered customers (80% agree compared with 72% unmetered). There is also a strong correlation with satisfaction with value for money of water and sewerage services.

3.6.5 Encouragingly, four fifths of respondents (80%) would be likely to contact their water company if they were worried about paying their bills. This has increased by 7% in the last year and slightly surpassing the level in 2008.

**Chart 3.16 Likelihood of the customers contacting the water company if they are worried about paying their bill**




3.6.6 Customers in the Thames region are the least likely to say they would contact their water company if they were worried about paying their bill (71%).

3.6.7 Respondents from black and minority ethnic groups (BME's) are less likely to say that they would contact their water company if they were worried about paying their bill (64% of BME's respondents compared with 81% of other respondents).

3.6.8 Respondents of lower social grades are also less likely to contact their water company if they are worried about paying their bill (78% C2DE compared with 83% ABC1).

3.6.9 Not surprisingly, respondents who have made an enquiry to their water company would be significantly more likely to make contact if they were worried about paying their bill (90% compared with 79% of those who have not made an enquiry).

# 4. Consumer rights and responsibilities

4.01 This section explores customers' views on a variety of issues relating to the rights and responsibilities of water consumers. This includes the take-up of water meters, awareness of the option to have a water meter fitted free of charge, awareness and take-up of special tariffs, and awareness of consumer rights and issues relating to contacting the water companies.


**Summary**

- Only 5% of respondents are aware of the WaterSure/Welsh Water Assist Tariff. This has decreased from 9% in 2009.

- One in eight respondents (13%) are aware of their water company's services for elderly and/or disabled customers; this is a decrease from 24% in 2009.

- Nearly one fifth of respondents (18%) who are not aware of the WaterSure/Welsh Water Assist Tariff would like to know more about it.

- A sixth (16%) who are not aware of the services for the elderly/disabled would like to know more.

- Over one third (35%) claim to be aware that under certain circumstances they may be entitled to compensation for service failures.

- One third of respondents (34%) have a water meter and in this particular sample significantly more customers of water only companies have a water meter (46%) than customers of water and sewerage companies do (33%).

- Overall 9% of respondents say that they have contacted their water company to make an enquiry in the past 12 months, a further 3% have made a complaint. Taking everything into account, 70% of these respondents say that they are satisfied with the contact with their water company.


### 4.1 WaterSure/Welsh Water Assist Tariff

4.1.1 Five per cent of respondents are aware of the WaterSure/Welsh Water Assist Tariff. This has decreased from 9% in 2009.

4.1.2 This has been accompanied by an increase in those wanting to know more about the WaterSure/Welsh Water Assist tariff from 13% in 2009 to 18% this year.

- This was highest in the Midlands region of England where 22% said they would like to know about the tariff.

4.1.3 Awareness of this tariff is significantly lower in England than it is in Wales. Five per cent of respondents in England are aware of the WaterSure tariff compared with 9% of respondents in Wales who are aware of the Welsh Water Assist Tariff.

4.1.4 Within England awareness is highest in the Wessex region (9%) and lowest in Northumbria (1%).

4.1.5 Respondents from lower social grades are more likely to say that they would like to know more about the tariffs (25% of DE's compared with 13% of AB's, 14% C1's, 17% C2's).

4.1.6 Owner occupiers are less likely to have heard of the WaterSure tariff than private sector renters/social housing (5% compared with 9% and 8% respectively).

### Chart 4.1 Awareness of WaterSure/Welsh Water Assist tariff

Q. Are you aware of or are you currently on the WaterSure/ Welsh Water Assist tariff?

| | 2007[1] (2,088) % | 2008 (2,000) % | 2009 (2,000) % | 2010 (2,012) % |
|---|---|---|---|---|
| **Aware** | **11** | **7** | **9** | **5** |
| Subscribed | 1 | 1 | 2 | 1 |
| Aware but no need to subscribe | 10 | 6 | 7 | 4 |
| | | | | |
| **Not Aware** | **87** | **91** | **87** | **83** |
| No, but would like to know more | 11 | 14 | 13 | 18 |
| No, but do not need it | 76 | 77 | 74 | 65 |
| | | | | |
| Don't know | 1 | 2 | 4 | 12 |

England – 5% Aware
Wales – 9% Aware

[1]In 2007 the tariff was referred to as the 'Vulnerable Groups Tariff'

Base: All respondents (n)

4.1.7 Based on responses to a series of questions about their personal circumstances[2] 4% (94 respondents) of the sample may be eligible for the WaterSure/Welsh Water Assist tariff but are not currently signed up. Most of these customers (93%) have not heard of the tariffs, including 56% who say that they do not need it and 37% who say that they would like to know more.

4.1.8 Respondents in lower social grades are more likely to be aware of the WaterSure/Welsh Water Assist tariff (9% DE's compared with 4% AB's).

[2] This figure is based on all respondents surveyed (2,012). Potential eligibility for WaterSure derived from responses to Q59 and Q62-65 in the questionnaire (see appendix). Only metered customers in England may be eligible, whereas in Wales both metered and unmetered customers may be eligible.

4.1.9 Respondents with a long-term disability are significantly more likely to say they would like to know more about the WaterSure/Welsh Water Assist tariff (24% compared with 16% of other respondents).

## 4.2 Services for elderly and/or disabled customers

4.2.1 In response to the question *"Are you aware of your water company's services for elderly and/or disabled customers? This includes services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure company representatives are genuine, or notification of customers on dialysis who need constant availability of supply?"*, one in eight respondents (13%) say that they are aware. This is significantly lower than in 2009 when one quarter (24%) were aware.

4.2.2 This year, awareness is slightly lower amongst those with a disability or long-term health condition (10%) than those without (13%).

4.2.3 One in six respondents would like to know more about the services available for elderly and/or disabled customers (16%), which is an increase on previous years.

### Chart 4.2 Awareness of services for elderly and/or disabled customers

Q. Are you aware of your water company's services for elderly and/or disabled customers?

| | 2007 (2,088) % | 2008 (2,000) % | 2009 (2,000) % | 2010 (2,012) % |
|---|---|---|---|---|
| **Aware** | **29** | **25** | **25** | **13** |
| Subscribed | 1 | 1 | 1 | 1 |
| Aware but no need to subscribe | 28 | 24 | 24 | 12 |
| | | | | |
| **Not Aware** | **70** | **75** | **75** | **83** |
| No, but would like to know more | 10 | 10 | 11 | 16 |
| No, but do not need it | 60 | 65 | 64 | 67 |
| Don't know | 1 | 1 | 1 | 4 |

Base: All respondents (n)

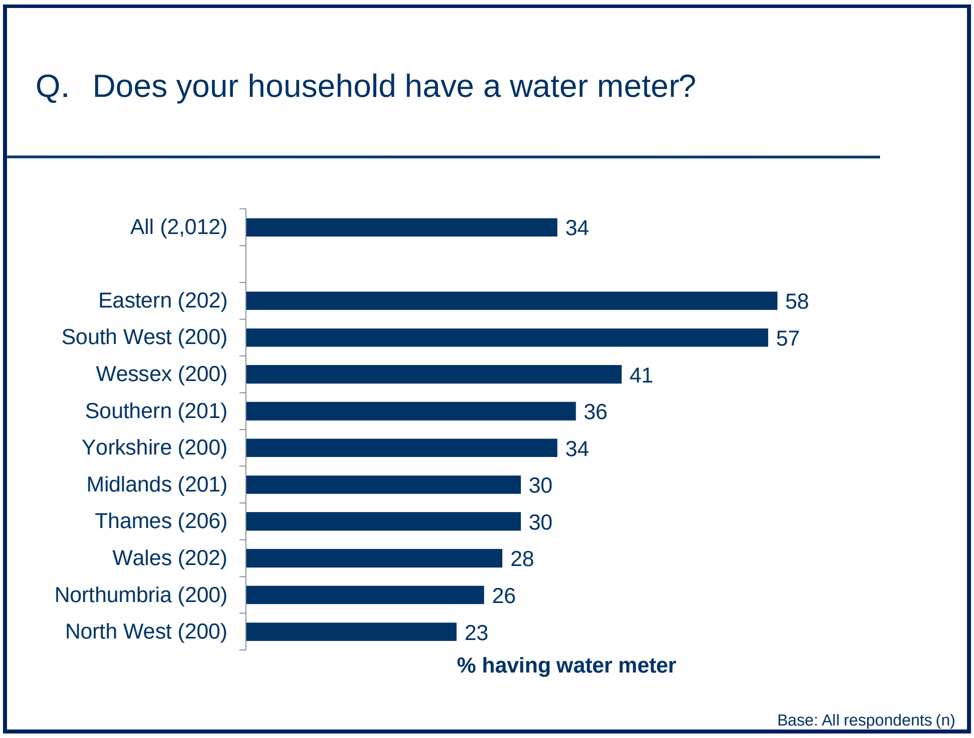
4.2.4 Those with a disability or long-term health condition are most likely to say that they would like to know more about these services (31% compared with 12%).

4.2.5 Elderly customers would also like to know more about these services (29% of those 61+, compared with 10% of those aged 60 and under). This has been observed in all tracking surveys.

### 4.3 Incidence of water meters

4.3.1 Overall, 34% of respondents have a water meter fitted. As in previous years, penetration of water meters continues to vary greatly by region with households in Eastern and South West regions the most likely, and those in the North West and Northumbria the least likely to have a water meter fitted.

**Chart 4.3 Proportion of households with a water meter fitted**




4.3.2 In this sample, significantly more customers of water only companies have a water meter than customers of water and sewerage companies (46% compared with 33%).

4.3.3 Older respondents are more likely to have a water meter for their household than those who are younger; 59% of those aged 75+ and 39% of 61-75 year olds have a meter fitted, compared with 28% of under 60's.

4.3.4 Smaller households (one person) are significantly more likely to have a water meter than larger households (47% of one person households have a meter fitted, compared with 39% of two person households, 32% of one parent families and 23% of two parent families).

4.3.5 Respondents with a disability or long-term health condition are significantly less likely to have a water meter for their household (30% compared with 36% overall).

### 4.4 Requesting a water meter

4.4.1 Less than half of respondents from unmetered households (46%) knew they could have one fitted free of charge (a decrease from 56% in 2009).

4.4.2 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 do not wish to keep the meter, then they can go back to the original rateable value charge for the property at no cost[3]. Among unmetered customers, 24% of those surveyed (which equates to just over half of those aware that they could have a new meter fitted free of charge) were aware that they could have it on a trial period (23% in 2009).

### 4.5 Water meter users' attitudes and behaviour

4.5.1 Throughout the report differences in attitudes and behaviour of metered and unmetered households are highlighted and it is clear that those who have a water meter fitted are more engaged on some issues affecting their water and sewerage services. Below is a summary of some of the key differences between metered and unmetered respondents. Customers with water meters fitted are:

- More likely to say that their water and sewerage charges are affordable.
- More likely to be satisfied with their water pressure.
- More likely to be aware of WaterSure/Welsh Water Assist.
- More likely to be aware of compensation if certain service standards are not met.
- More likely to have a water butt in the garden or a Hippo/Save-a-flush device.

4.5.2 Some differences, such as having a Hippo/Save-a-flush device, appear to relate to having a water meter fitted. However, it is important to note that some of these differences are not necessarily as a result of having a water meter fitted. It may be that customers who are already concerned about their water usage, or are already more aware of what services are available to them, then have a meter fitted, rather than that the fitting of the meter brings about concern on water usage or increased levels of awareness.

4.5.3 Older bill payers are also more likely to have a water meter than younger bill payers and age is another factor which may affect the differences in attitudes and behaviours between metered and unmetered respondents.

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[3]This is the case except in Veolia Water South East (formerly Folkestone & Dover Water) where a compulsory metering programme is underway for all households and there is no option to change back to a fixed charge.

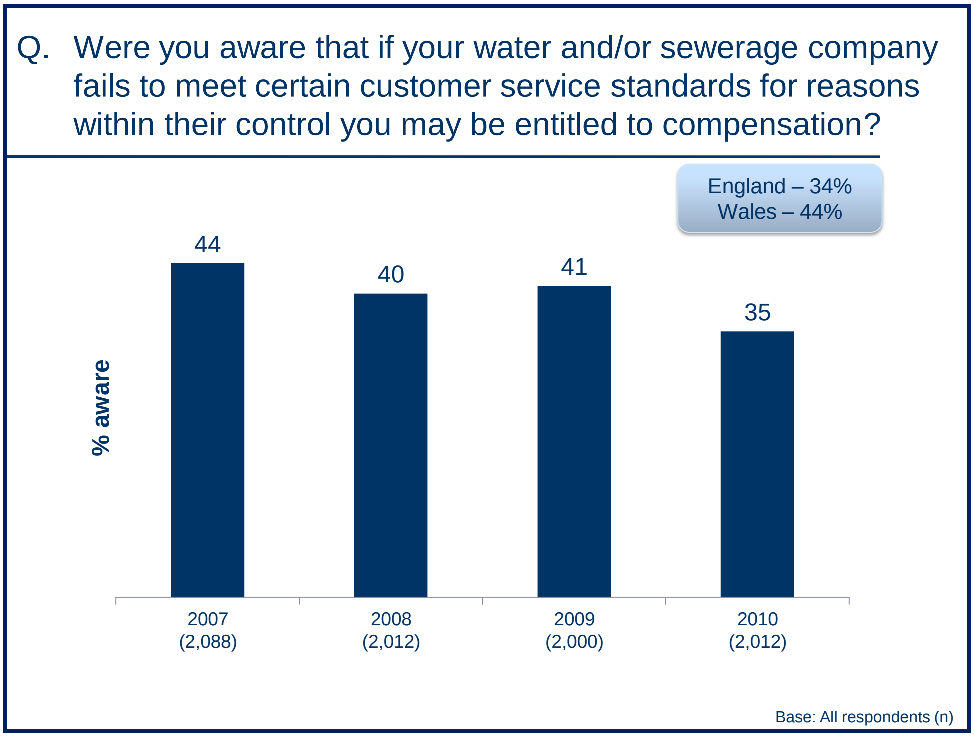
### 4.6 Service standards and compensation

4.6.1 There are a number of customer service standards which all water companies must comply with. These are set out to protect customers and, if a water or sewerage company fails to meet these standards, for reasons within their control, customers may be entitled to compensation. Over one third of respondents (35%) state they are aware that under certain circumstances they may be entitled to compensation. This is significantly lower than in previous years.

4.6.2 Respondents in the South West are most likely to be aware that they may be entitled to compensation (49%). This is much higher than the average for England (34%). Respondents in the Thames region are least likely to be aware (28%).

4.6.3 Respondents in Wales are significantly more likely than those in England to be aware that they may be entitled to compensation (44% Wales, 34% England).

**Chart 4.4 Aware of compensation rights if the water and/or sewerage company fails to meet service standards for reasons within their control**




4.6.4 There are a number of other significant differences by sub-groups of those aware that if water and sewerage companies fail to meet certain customer service standards, for reasons within their control, they may be entitled to compensation:

- Younger respondents (aged 18-34) are the least likely to be aware (16%).
- Respondents of a higher social grade are more likely than others to say that they are aware (42% of AB's).
- Owner occupiers are more likely than renters to be aware (37% of owner occupiers compared with 27% of private renters and 27% of social renters).

- Metered customers are more likely to be aware (40% compared with 33% of unmetered).

### 4.7 Contacting water companies

4.7.1 Overall, nearly one in ten respondents (9%) say they have contacted their water company to make an enquiry in the past 12 months (this is half the proportion in 2009 – 18% and 2008 – 18%). As in previous years, customers in the South West are most likely to say that they have made an enquiry – 15% (28% in 2009).

4.7.2 There are a number of other significant differences by sub-group, as detailed below:

- Younger respondents are the most likely to say that they have made an enquiry in the last 12 months (13% of 18-34 year olds compared with 9% of 35-74 year olds and 5% of over 75's).

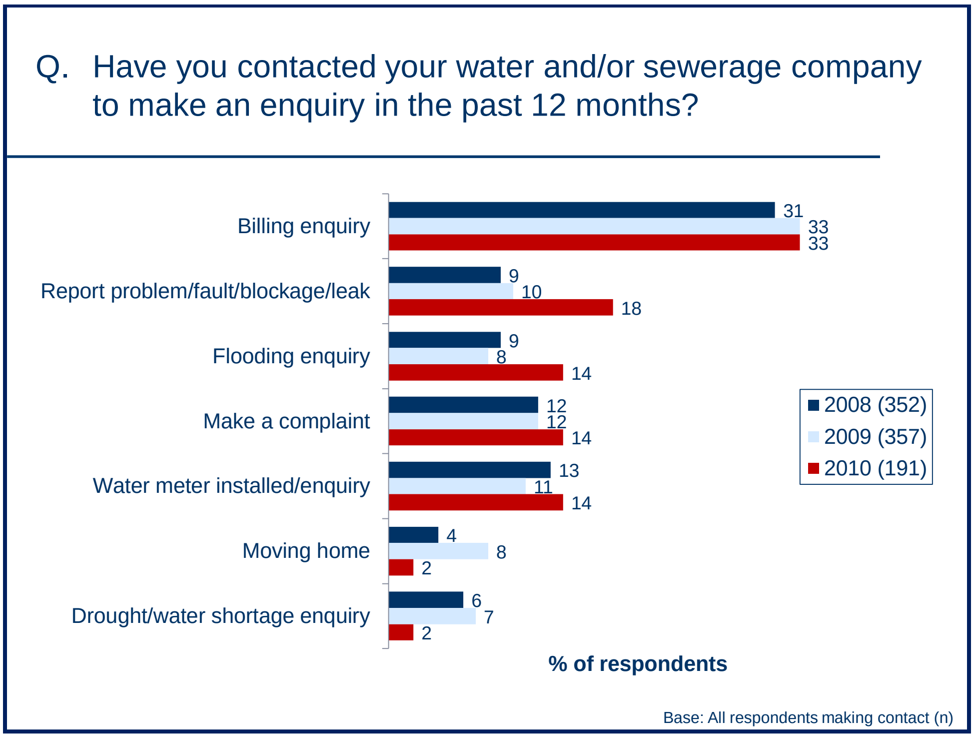
- Respondents who are dissatisfied with their sewerage service are more likely to have made an enquiry in the last 12 months (23% compared with 8% who are satisfied with their sewerage service).

- Respondents who are dissatisfied with the value for money of their water and/or sewerage service are more likely to have made an enquiry in the last 12 months (16% compared with 7% who are satisfied with value for money).

- Respondents who have someone in their household who is disabled or with a long-term health condition are more likely to have made an enquiry in the last 12 months (13% compared with 7% who do not).

4.7.3 Respondents are most likely to contact their water company with a billing enquiry, followed by a problem/fault/blockage or leak.

**Chart 4.5 Reasons for making contact**



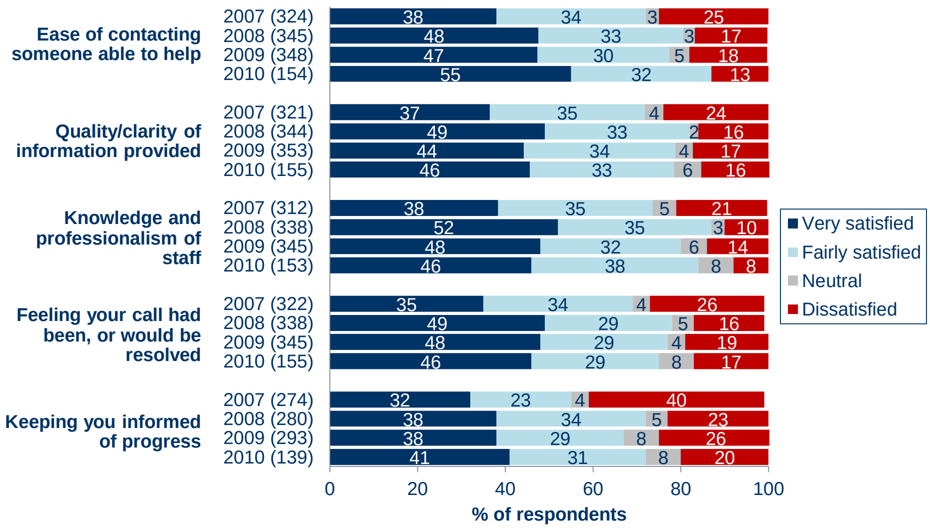

4.7.4 The proportion contacting their water supplier to report a problem/fault/blockage or leak, or about a flood, has increased but actually reduced in number. This is in line with a significant reduction in overall contact numbers.

4.7.5 The following chart shows customers' satisfaction with various aspects of contact with their water/sewerage company. The element of service respondents are most likely to be satisfied with is the ease of contacting someone able to help (87% satisfied) – this has increased significantly over time. The aspect of contact customers are least likely to say that they are satisfied with is being kept informed of progress (72% satisfied).

4.7.6 Dissatisfaction with contact has decreased for all attributes since 2009.

### Chart 4.6 Satisfaction with contact

Q. Thinking about your contact with your water and/or sewerage company, overall how satisfied were you with?



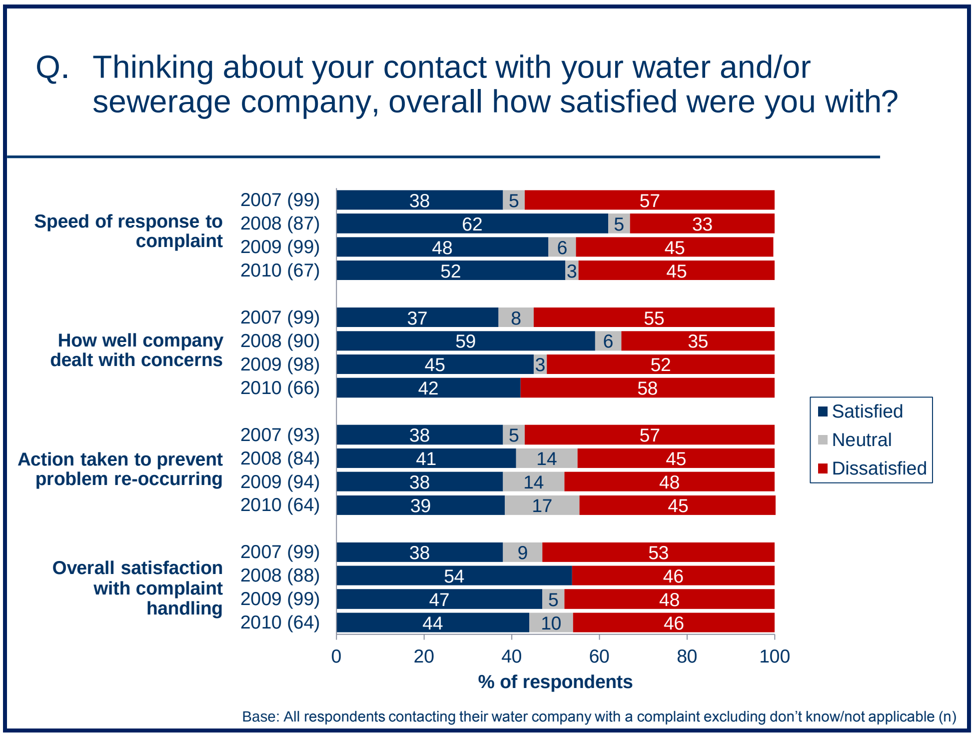

Base: All respondents contacting their water company with an enquiry excluding don't know/not applicable (n)

## 4.8 Making a complaint

4.8.1 When prompted, a total of 3% 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 2009).

4.8.2 Chart 4.7 below shows that satisfaction with the complaints handling process was highest in 2008. There have been no significant changes over the last 12 months.

### Chart 4.7 Satisfaction with complaint handling over time

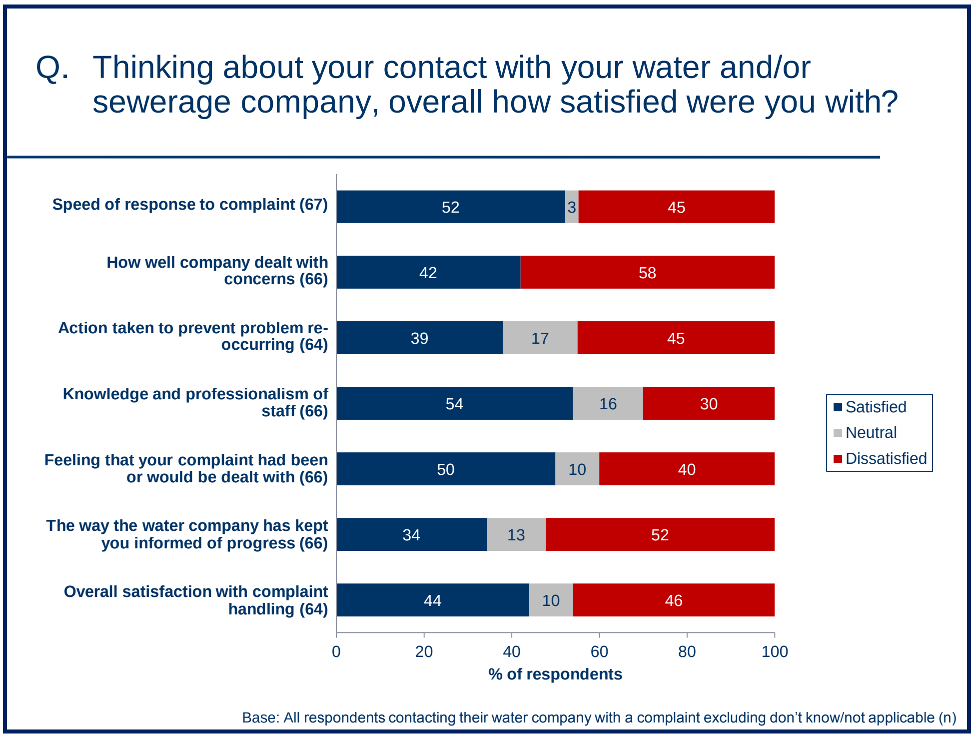


4.8.3 A number of new statements concerning attitudes towards complaint handling were added to the 2010 survey to mirror those asked for respondents making an enquiry.

4.8.4 As was the case with enquiry handling, respondents are least likely to be satisfied with the way the water company has kept them informed of progress (34% satisfied).

4.8.5 Respondents are most satisfied with the knowledge and professionalism of staff from their water company (54% satisfied).

## Chart 4.8 Satisfaction with complaint handling



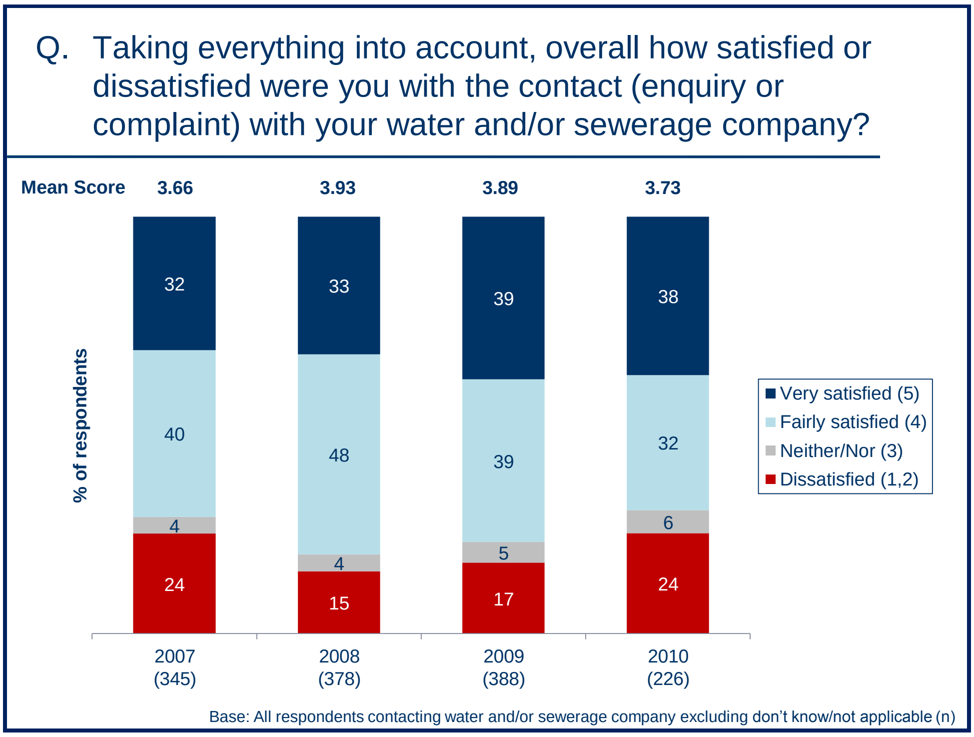
4.8.6 The 33 respondents who were dissatisfied with the way their complaint was handled were asked what they would have changed about this. The main changes that customers would have liked were:

- More information/communication – (mentioned by 43% of complainants dissatisfied with the way their complaint was handled).
- Issue should have been dealt with/resolved – 37%.
- Quicker service – 29%.
- Staff should listen/seem more interested – 12%.
- Staff should have been more understanding/sympathetic – 11%.
- Staff should be more knowledgeable/experienced – 9%.

## 4.9 Overall satisfaction with contact

4.9.1 Including those who had made complaints, 11% of respondents had contacted their water company in the last 12 months. Taking everything into account, 70% of these respondents are satisfied with this contact (78% in 2009 and 81% in 2008), showing a steady decline in satisfaction over time.

### Chart 4.9 Overall satisfaction with contact




4.9.2 Those who are satisfied with the value for money of their water and sewerage services are significantly more likely to be satisfied with any contact they have had with their water company than those dissatisfied with value for money (76% compared with 55% in 2010). This suggests people's experiences of contact with their water company are strongly influenced by their value for money perceptions and vice versa. This has also been apparent over the past four years.

4.9.3 Two of the main causes of dissatisfaction with overall contact are issues not being dealt with (27%) and lack of information (25%). There are also a number of issues relating to staff:

– Staff should be more sympathetic – 27%.

– Staff should be more interested – 16%.

– More knowledgeable staff – 11%.

# 5. Water on tap

5.0.1 Section 5 looks at customers' views on a variety of issues relating to their water service, including their overall satisfaction with their water supply and efforts to encourage customers to use water wisely.

**Summary**

- There are high levels of satisfaction for all aspects of water service, with customers most satisfied with the reliability of their water supply (97%) and least satisfied with the hardness/ softness of their water (68%).

- Respondents are very satisfied overall with their water supply (94%).

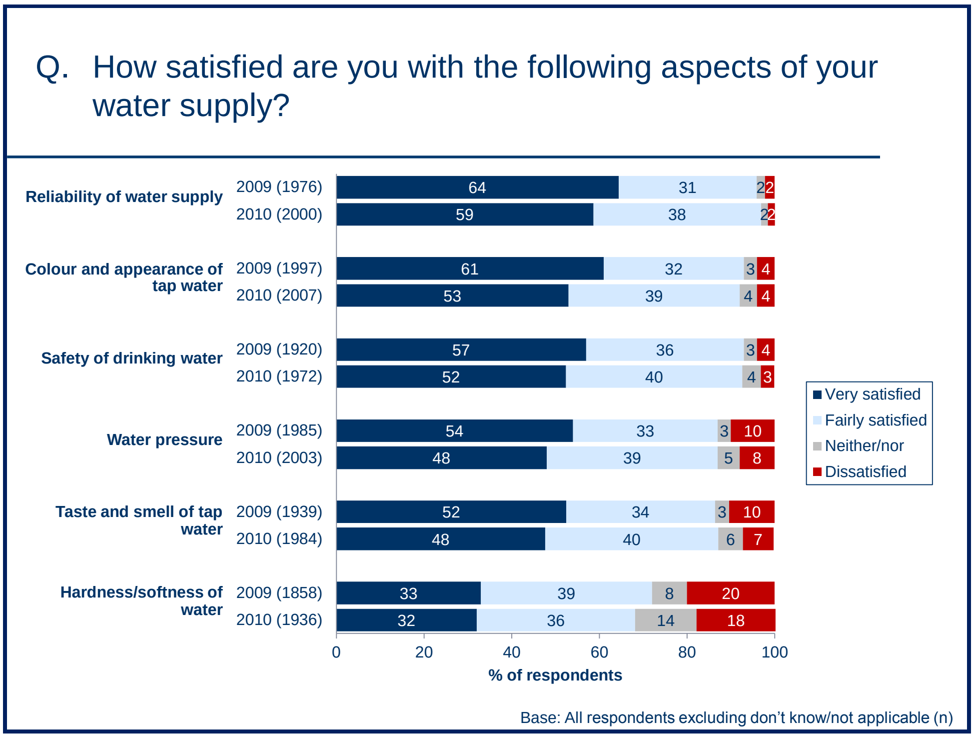
- Three quarters of respondents (76%) say they have taken specific actions to reduce their use of water over the past year. Encouragingly, this has increased significantly since 2009.

- Less than half of respondents (47%) say they have seen campaigns designed to encourage people to use water wisely over the past year.

## 5.1 Satisfaction with water supply

5.1.1 There are high levels of satisfaction for all aspects of water supply, with customers most satisfied with the reliability of their water supply (97%) and least satisfied with the hardness/softness of their water (68%). There has been a significant fall in satisfaction with this area since 2009 (72%).

### Chart 5.1 Satisfaction with various aspects of water supply




5.1.2 Water and sewerage company customers are significantly more satisfied with the hardness/softness of their water than customers of water only companies (69% compared with 54% respectively). Generally, regions where tap water tends to be hard show lower levels of satisfaction with this aspect of water supply service. The lower levels of satisfaction shown by the customers of water only companies could be because there is a cluster of water only companies in the South and South East of England where water tends to be harder and this finding may be more closely linked to geography rather than company type.

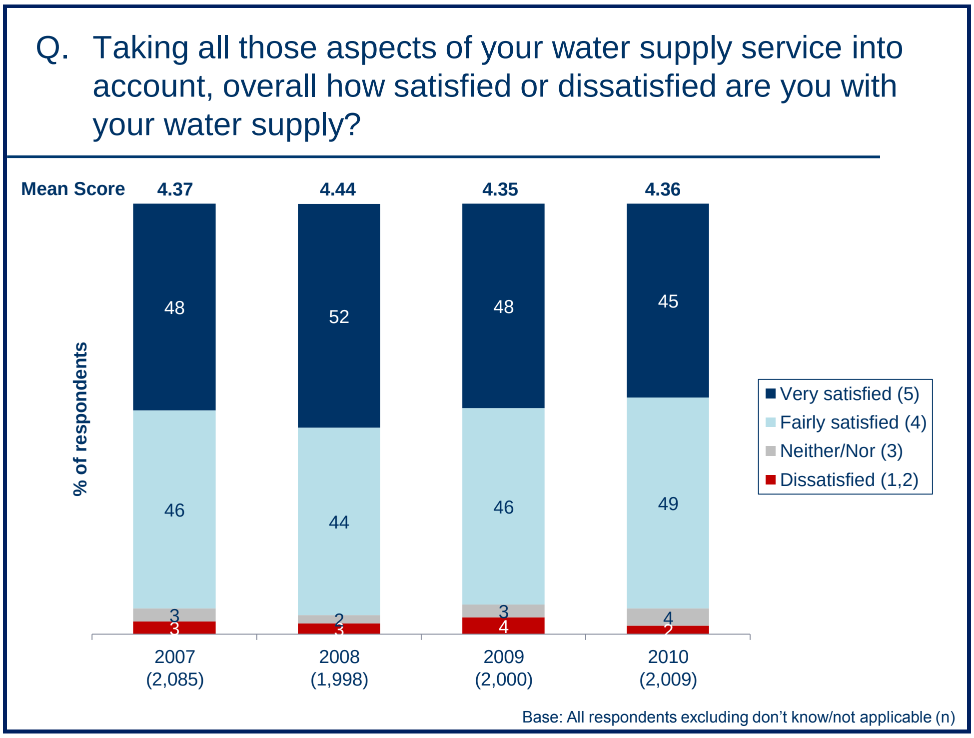
5.1.3 There are wide ranging regional variations in satisfaction with hardness/softness of water which are likely to reflect regional differences in the type of tap water people receive. Respondents in the Thames region are least satisfied with the hardness/softness of their water (52%) whereas respondents in the North West and Wales are most satisfied (87% each).

5.1.4 Respondents in Wales are significantly more satisfied with their water pressure (92% Wales compared with 87% England). Respondents in the South West are also significantly more satisfied with their water pressure than England overall (91%).

5.1.5 Metered customers are significantly more satisfied with their water pressure than unmetered customers (91% compared with 85%).

5.1.6 Overall, 94% of respondents say that they are satisfied with their water supply and, as the following chart shows, satisfaction ratings have remained stable over time, although those 'very satisfied' has been steadily falling for the last 3 years.

**Chart 5.2 Overall satisfaction with water supply**




5.1.7 Those who are satisfied with the value for money of water and sewerage services are significantly more likely to be satisfied (97%) with their water supply than those who are dissatisfied with value for money (77%). This again illustrates the link between perceptions of value for money and other aspects of water/sewerage services (Chapter 3).

5.1.8 Respondents who have contacted their water company are less likely to be satisfied with their water supply than those who have not had any contact (respondents who have made an enquiry: 88% compared with 94% who have not; respondents who have made a complaint: 79% compared with 94% who made no contact).

## 5.2 Using water wisely

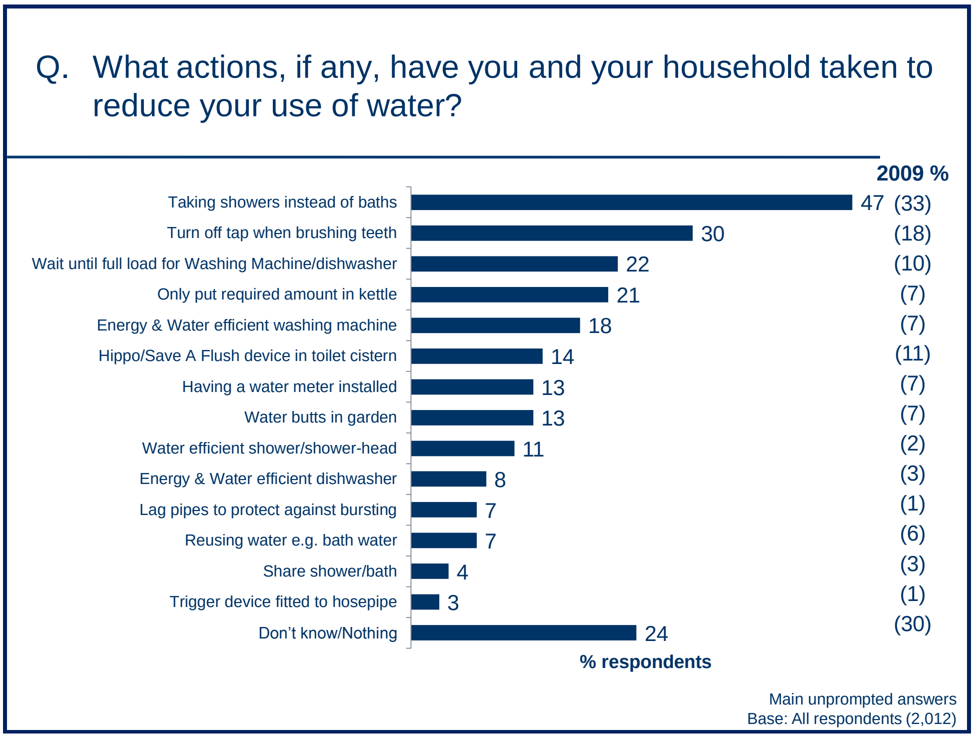
5.2.1 Encouraging people to use water wisely is one of CCWater's key areas of work. Respondents were asked "*What actions, if any, have you and your household taken to reduce your use of water?"* Responses were initially analysed in the same way as previous years to enable comparisons to be made. A second analysis was then carried out whereby those respondents who gave having a water meter installed as their only water saving activity were re-coded as 'doing nothing' to use less water on the basis that a water meter does not in itself save water.

## 5.3 Initial analysis

5.3.1 Three-quarters (76%) say they are doing something to reduce their use of water but there is still a quarter (24%) who say that they do not do anything or do not know what they could do to reduce their use of water. There has been a 6% increase in the proportion of respondents who are taking action to reduce their water use since 2009, which is encouraging.

5.3.2 The majority of water saving activities are mentioned by significantly more customers than they were last year, which shows that respondents are trying to reduce their water usage more prevalently and in many different ways.

### Chart 5.3 Actions taken to reduce the use of water




5.3.3 Respondents in England are significantly more likely than those in Wales to have taken action to reduce their water usage (77% compared with 69%).

5.3.4 Metered customers are significantly more likely to say they have taken action to reduce their use of water (82% compared with 74% of unmetered customers).

### 5.4 Secondary analysis

5.4.1 Having a water meter installed is not a conscious water saving behaviour unless it is accompanied by other water saving activities such as turning the taps off when brushing teeth. Removing respondents who have *only* installed a water meter and have no other water saving activities in their households means that the proportion of respondents who have taken no action to reduce water usage increases to 27% (34% in 2009).

5.4.2 Removing the respondents who have *only* installed a water meter also impacts on the proportions of metered and unmetered households taking actions to save water. There is no longer a significant difference between these two groups, with 27% of metered and 26% of unmetered households taking no action (was 18% metered and 26% unmetered).

5.4.3 However, metered households are still significantly more likely to install a Hippo/Save-a-flush (17% metered and 12% unmetered) and water butts (18% metered, 10% unmetered) than unmetered households.

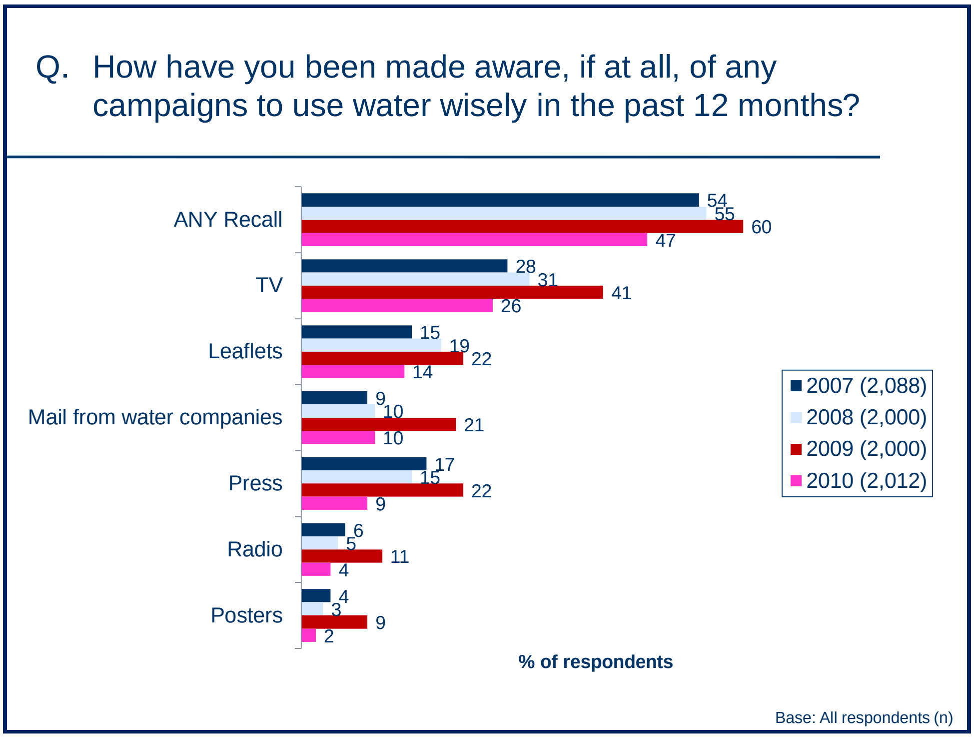
5.4.4 Respondents in England are also still significantly more likely than those in Wales to have taken action to reduce their water usage (77% compared with 66%).

## 5.5 Awareness of water saving campaigns

5.5.1 Less than half of respondents (47%) have been aware of campaigns to use water wisely in the last 12 months (down from 60% in 2009). Awareness is lowest (56% unaware) in the Northumbria region.

5.5.2 There has been a decrease in mentions for all types of media campaigns, but television still remains the main mention (26%). Results in 2010 are more in line with those achieved in 2008.

### Chart 5.4 Awareness of use water wisely campaigns



# 6. Clearing up

6.0.1 Section 6 explores customers' views on issues relating to the disposal of waste, including views on what is acceptable to dispose down the toilet, sink or drain, and overall satisfaction with sewerage services.

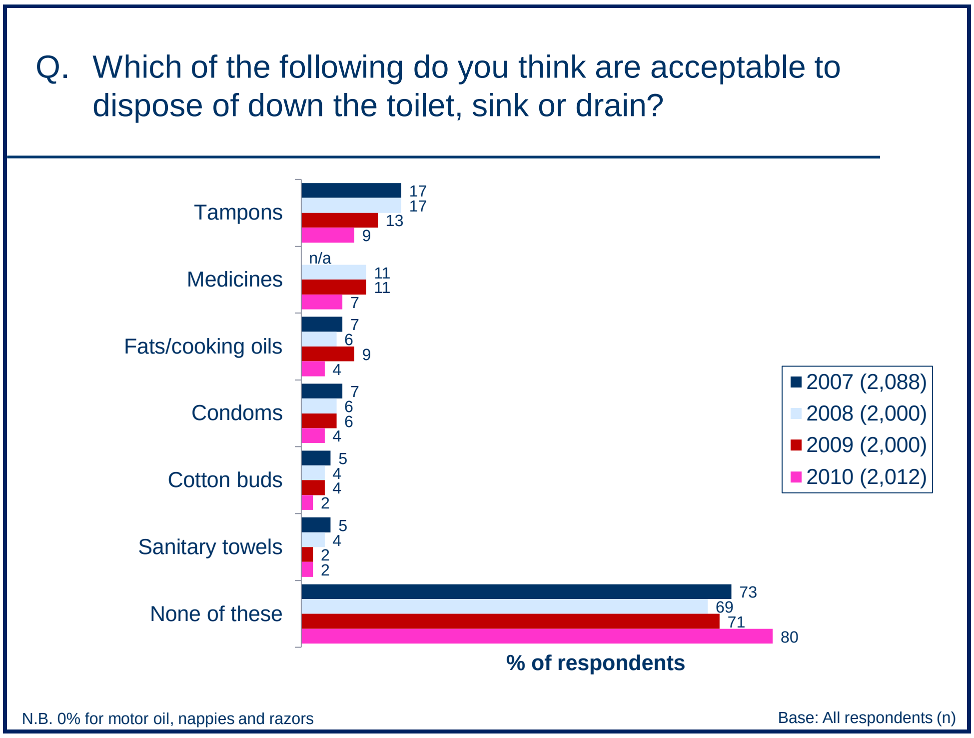

**Summary**

- One in five customers (20%) are confused about what can be flushed down the toilet, or disposed of down the sink or drain. Encouragingly though, this has fallen from 29% in 2009.
- 91% of respondents say that they are satisfied overall with their sewerage services.
- Both satisfaction and dissatisfaction with different elements of sewerage services has fallen slightly over the past year, significantly so for maintenance of sewerage pipes and treatment works and cleaning waste water properly. Respondents are more neutral about these services. Yet comparatively few are dissatisfied with any aspect of their sewerage services.
- Only 3% of respondents say that they are overall dissatisfied with their sewerage services.

## 6.1 Disposing of waste

6.1.1 None of the items in the chart below should be disposed of down the toilet, sink or drain mainly because they increase the risk of blockages to sewers and drains. However 20% of respondents still think that some of them are suitable to be disposed of in this way. Four fifths (80%) correctly answered that none of the items are acceptable to dispose of down the toilet, sink, or drain - the highest proportion for four years. This is likely to be linked to the many FOG[4] campaigns run by water companies in 2010.

### Chart 6.1 Awareness of what is acceptable to dispose of down the toilet, sink or drain

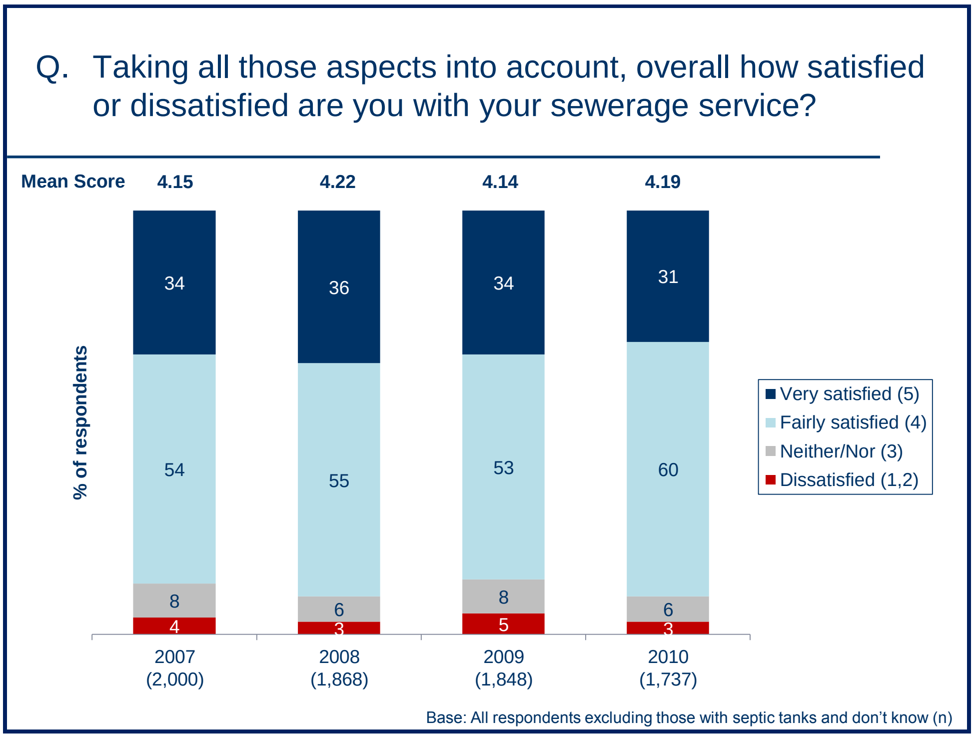



[4] The water industry has published best practice guidelines to ensure that fats, oils and grease (FOG) are disposed of correctly and do not enter drains and sewers. Individual water and sewerage companies also publish advice to customers on the correct use of the wastewater network and alternative disposal methods for fats, oils, grease and other waste products which are not suitable for disposal via the domestic drainage system.

## 6.2 Satisfaction with sewerage services

6.2.1 In 2010, 91% of respondents are satisfied with sewerage services compared with 87% in 2009. Satisfaction with sewerage services has fluctuated over the past 4 years but, throughout this period, only a small minority have said that they were dissatisfied - in 2010 just 3% were dissatisfied with overall service.

### Chart 6.2 Overall satisfaction with sewerage service



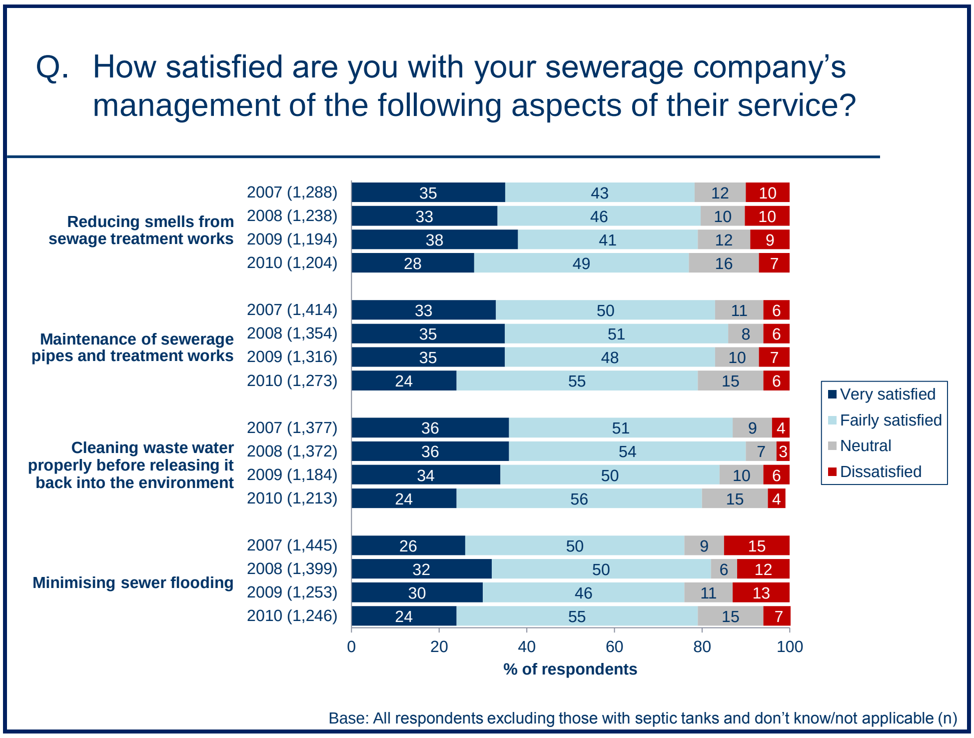

6.2.2 Those over the age of 75 are the most satisfied with their sewerage services with 98% saying this is the case.

6.2.3 Respondents who have made a query or complaint to their water company are significantly less satisfied with their sewerage services than those who have not (83% compared with 92% who made an enquiry, 72% compared with 92% who made a complaint).

6.2.4 There are no significant differences at a regional level.

6.2.5 When examining customer satisfaction in more detail, there has been a fall in the proportion of customers satisfied with individual aspects of service over the past year, significantly so for maintenance of sewerage pipes and treatment works and the cleaning of waste water before it is released into the environment. However, this may be related to the increase in the number of customers providing a neutral response. It is worth noting that dissatisfaction has actually decreased for all measures since 2009.

### Chart 6.3 Satisfaction with the management of sewerage services




6.2.6 Respondents in the Thames region are the least satisfied with their overall sewerage service (88%), whereas respondents in Northumbria are generally the most satisfied (94%). However these are not significant differences.

# 7. Comparisons with other utilities

7.01 Section 7 further examines perceptions of water companies and makes comparisons with other utilities. Comparative value for money and complaint procedures have already been covered in this report; this section focuses on levels of trust, the feeling that companies care about the service they provide, and comparative satisfaction with services.

**Summary**

- Despite improving scores for energy companies, respondents are still more likely to think that their water and sewerage company cares about the service it provides when compared to their energy company (64% compared with 61%), although the gap is narrowing over time.

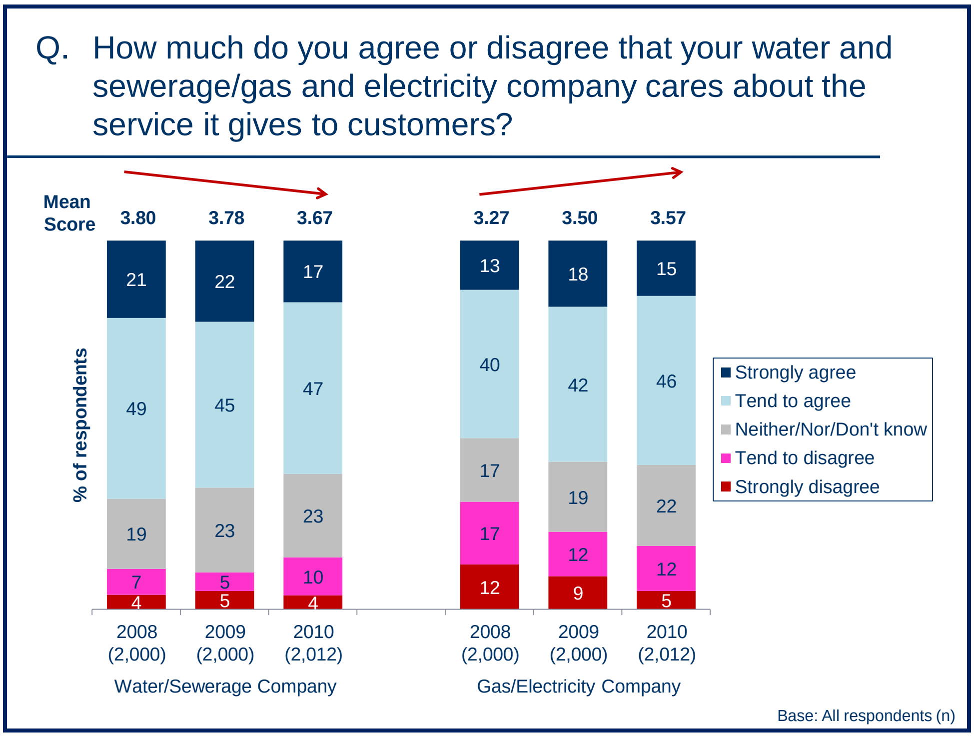
- Respondents are more likely to say that they trust their water and sewerage company than that they trust their energy company.

- Overall satisfaction for water and sewerage companies and landline suppliers has changed very little since 2008 and levels of satisfaction with water and sewerage companies, energy suppliers and landline suppliers are almost aligned this year (88% water & sewerage company compared with 89% energy supplier and 88% landline supplier).

## 7.1 Companies caring about the service they provide

7.1.1 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 in the water and sewerage industry where household customers are not able to switch suppliers. Although the proportion of respondents agreeing that their energy company cares about the service they give has increased to 61% over the past year, customers are still significantly more likely to agree that their water and/or sewerage company cares about the service they give to customers (64%). Having said this, the gap between energy and the water industry is narrowing over time.

**Chart 7.1 Agreement that companies care about the service they give to customers**

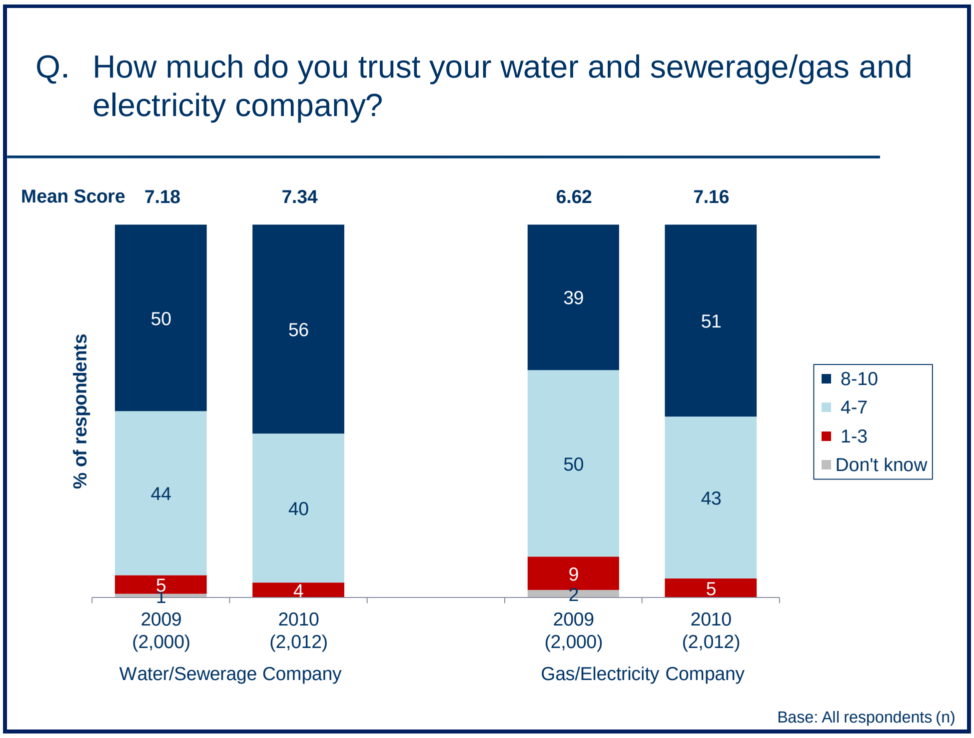


## 7.2 Trust in water/sewerage companies compared to energy companies

7.2.1 Respondents were asked how much they trust their water/sewerage company and energy company on a scale of one to ten where ten means that they trust them completely and one means that they do not trust them at all.

7.2.2 Customers tend to trust their water and/or sewerage company more than they trust their energy company with 56% giving their water and/or sewerage company a high score of eight to ten, compared with 51% giving their energy company the same high score. However, the proportion giving a score of eight to ten for their energy company has increased significantly since 2009.

### Chart 7.2 Trust in water and sewerage/gas and electricity companies



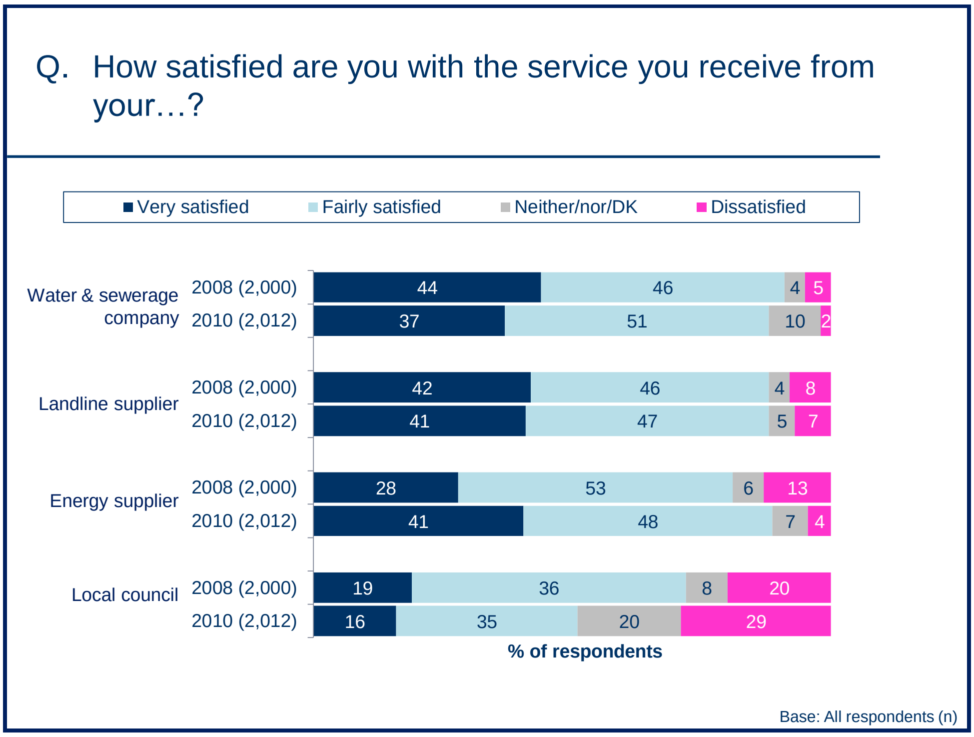
## 7.3 Satisfaction with services

7.3.1 Overall satisfaction for water and sewerage companies and landline suppliers has changed very little since 2008 and levels of satisfaction with water and sewerage companies, energy suppliers and landline suppliers are almost aligned this year (88% water & sewerage company compared with 89% energy supplier and 88% landline supplier).

7.3.2 Overall satisfaction for energy suppliers has increased significantly since 2008, which links in with the significant increase in satisfaction with value for money for energy suppliers over the past two years.

7.3.3 Overall satisfaction with local councils has decreased significantly since 2008 (52% compared with 72%).

### Chart 7.3 Satisfaction with services



# 8. Speaking up for water consumers

8.0.1 In this section we investigate customers' views on a number of issues linked to reporting problems with their water and sewerage services, awareness of CCWater and the perceived importance of CCWater as an organisation.


**Summary**

– Unprompted awareness of CCWater is very low (0.2% spontaneously mentioned CCWater as the consumer body for the water and sewerage industry – down from 0.7% last year).

– When prompted, one in seven (14%) say that they have heard of CCWater.

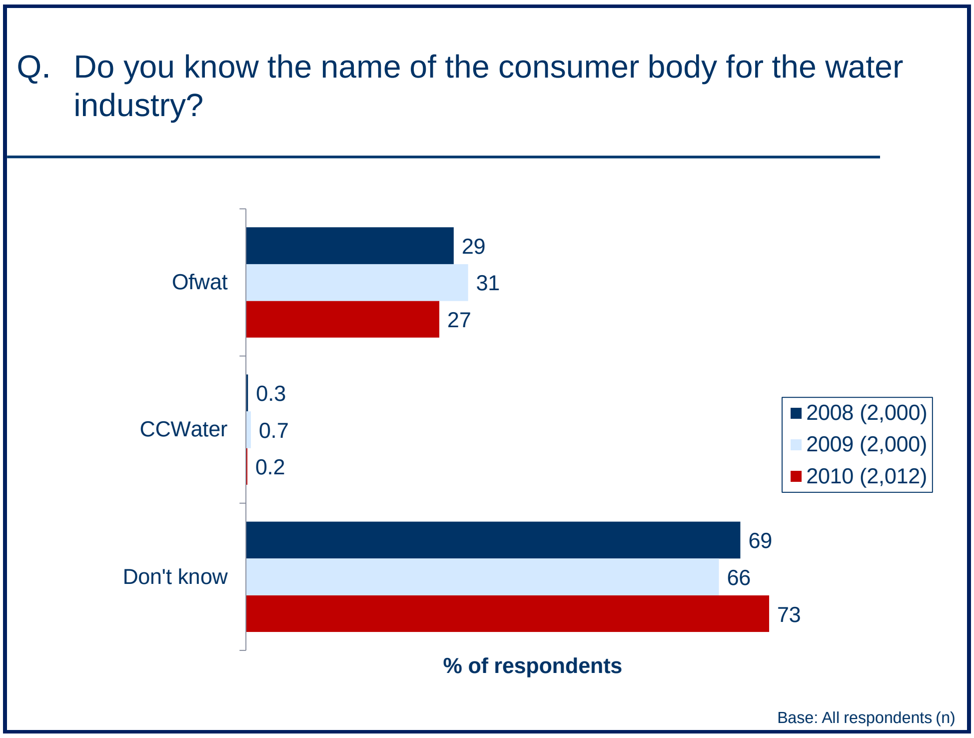
– Despite this low awareness of CCWater, nearly all customers (93%) agree that it is important to have a consumer body representing their interests in the water and sewerage industry. Almost one fifth think that it is absolutely essential, 55% think it is very important and 19% think it is fairly important (rounding up to 93% overall).

## 8.1 Awareness and perceived importance of CCWater

8.1.1 Unprompted awareness of CCWater is very low and amongst those who think they know who the consumer body for water is, Ofwat is most frequently mentioned (27% think that Ofwat is the consumer body, compared with 0.2% who believe it to be CCWater).

8.1.2 Despite these relatively low levels of spontaneous awareness, when prompted, a further 14% of respondents claimed to have heard of CCWater before it was mentioned to them in the survey.

### Chart 8.1 Unprompted awareness of CCWater




8.1.3 Respondents in the Midlands were the most likely to have heard of CCWater (19%), with respondents in the Thames region the least likely (9%).

8.1.4 Older respondents are more likely to say they had heard of CCWater, as was the case in previous years.

8.1.5 Of those aware of CCWater, most were unable to say what CCWater actually does, 19% think it provides a voice for consumers, 9% think it is a regulatory body for the water sector and 9% think it is a water company. Lesser mentions include:

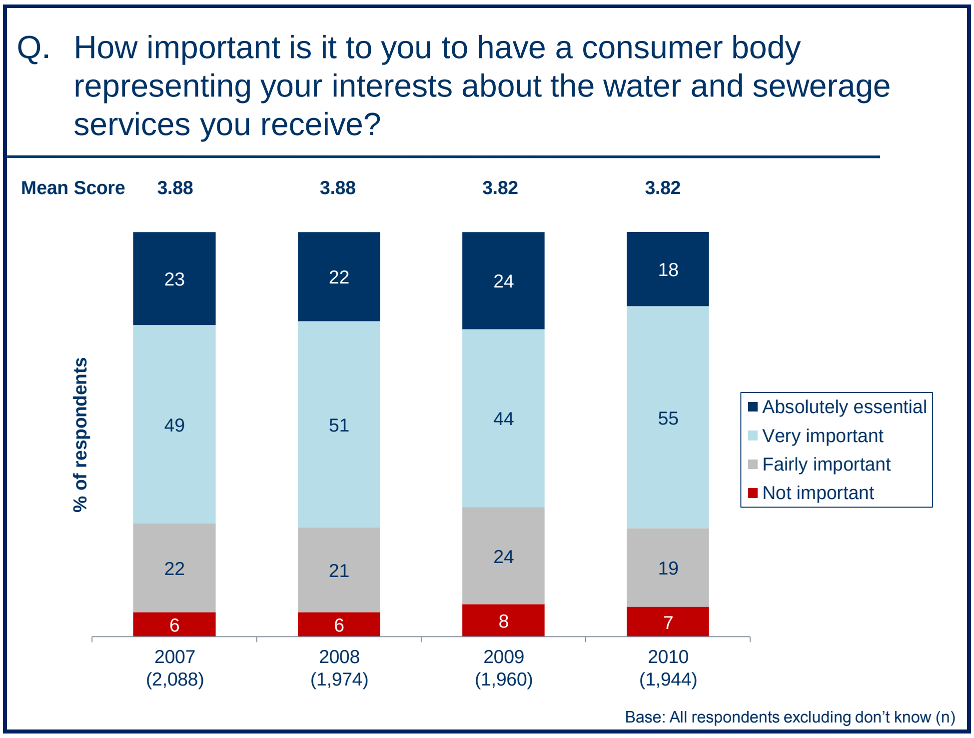
- 6% think it is a part of Ofwat.

- 3% think it is a Government body.

- 2% think CCWater does customer research.

8.1.6 Despite over 80% saying that they are unaware of CCWater, most respondents do still think that it is important to have a consumer body representing their interests about the water and sewerage services they receive. As shown in the chart below, almost one fifth (18%) think that it is absolutely essential, 55% think it is very important and 19% think it is fairly important. Only 7% think that it is not important to have a consumer body representing their interests within the water industry.

**Chart 8.2 Importance of having a consumer body representing customers' interests**




8.1.7 Respondents were given statements about CCWater and asked whether they agreed with them. Just over two fifths (44%) of those who were aware of CCWater after being prompted (302 respondents) say that they would know how to contact CCWater if they had a problem or needed advice (51% in 2009). Just over one third rate CCWater as being effective in representing their views (36%) and the same proportion say that they have seen references to CCWater or CCWater press notices (43% and 37% in 2009).

# 9. Conclusions

9.1 Over the past year customers' views on water and sewerage services have been fairly stable. Where there have been changes, these are inclined to be marginal rather than significant changes in opinion. However, there are signs that customer behaviour is changing, with more customers making a concerted effort to reduce water usage and an increasing number understanding what they can not dispose of down sinks, drains and toilets.

9.2 Detailed below are the key findings:

9.2.1 Satisfaction with value for money for water and sewerage services has increased slightly. Satisfaction with value for money remains lowest for the South West where there are higher than average water and sewerage charges.

9.2.2 Perceived value for money is very similar for energy and water suppliers (for both water supply and sewerage services).

9.2.3 There has been a slight increase in those perceiving that water and sewerage charges are fair, and a slight decrease in those who consider them to be unfair.

9.2.4 Affordability remains fairly stable year on year with a very small increase in the proportion agreeing their charges are affordable, and slight decrease in those who consider them to be unaffordable.

9.2.5 More consumers are likely to agree that charges are affordable than are likely to agree that charges are fair.

9.2.6 There has been a significant fall in those aware of:

- WaterSure/Welsh Water Assist.
- Services for elderly and/or disabled customers.
- The right to claim compensation if a company fails to meet certain service standards.

However, those interested in finding out more about WaterSure/Welsh Water Assist and services for elderly and/or disabled customers has increased.

9.2.7 There has been a significant fall in the number of customers contacting their water company with an enquiry or a complaint.

9.2.8 Satisfaction levels for general enquiries are, not surprisingly, higher than they are for complaint handling.

9.2.9 Whilst overall there has been a fall in those contacting their water company, there has been a significant increase in those who would contact them if they were struggling to pay their bills.

9.2.10 Satisfaction with water and sewerage services remains high.

9.2.11 Encouragingly, there has been an increase in the number of households taking action to reduce their water usage. This is despite awareness of using water wisely campaigns decreasing.

9.2.12 There has also been an increase in public understanding of what should be disposed of down the toilet/sink/drain – this is an area which has been promoted by many water companies in the last year.

# Appendix 1 – Questionnaire

**Introduction**
Good Morning/Afternoon, my name is… calling from DJS Research on behalf of the Consumer body for the water industry. We are carrying out a survey about water and sewerage services. Could you spare some time to answer some questions?

**READ OUT IF NECESSARY** The survey should take around 20 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.

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 | 85 | **CLOSE** |

**CLOSE 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 |
| You share payment of the bill with | |
| - With spouse/partner | 2 |
| - As part of shared house | 3 |
| Other (specify) | 4 |
| Don't know | 85 |

Q3. Do you or any member of your family work in: **READ OUT**

| | | |
|---|---|---|
| The water industry i.e. work for a water company | 1 | **CLOSE** |
| A consumer organisation e.g. Consumer Focus or Consumer Direct Which?, Citizens Advice Bureau | 2 | **CLOSE** |
| Market Research | 3 | **CLOSE** |
| None of the above | 87 | |

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 |
| 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 |
| **IF 1-10 ASK Q4b** | |
| **Water only companies** | |
| Bournemouth & West Hampshire Water Plc | 11 |
| Bristol Water Plc | 12 |
| Cambridge Water Company Plc | 13 |
| Cholderton & District Water Company Ltd | 14 |
| Dee Valley Water Plc | 15 |
| Essex & Suffolk Water | 16 |
| Veolia Water Southeast Ltd (formerly Folkestone & Dover Water Services) | 17 |
| Hartlepool Water Plc | 18 |
| Portsmouth Water Plc | 19 |
| South East Water Plc (including Mid Kent Water Plc) | 20 |
| South Staffordshire Water Plc | 21 |
| Sutton & East Surrey Water Plc | 22 |
| Veolia Water East Ltd (formerly Tendring Hundred Water Services) | 23 |
| Veolia Water Central Ltd (formerly Three Valleys Water) | 24 |

**IF 11-24 ASK Q4c**

| | |
|---|---|
| Don't know | 85 |

**IF DON'T KNOW: All respondents to check and arrange call back**

**ASK IF 1-10 AT Q4a**

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 | 85 |

**ASK IF 11-24 AT Q4a**

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**

| | |
|---|---|
| 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 | 85 |

## SECTION A - COMPANY INFORMATION

Q5a How much do you agree or disagree that your water and sewerage bill makes it clear how much needs to be paid and when? **SINGLE CODE**

| | |
|---|---|
| Strongly agree | 1 |
| Tend to agree | 2 |
| Neither agree nor disagree | 3 |
| Tend to disagree | 4 |
| Strongly disagree | 5 |
| Don't know | 85 |

Q5b. And do you agree or disagree that it is clear how the final amount of your bill was reached? **SINGLE CODE**

| | |
|---|---|
| Strongly agree | 1 |
| Tend to agree | 2 |
| Neither agree nor disagree | 3 |
| Tend to disagree | 4 |
| Strongly disagree | 5 |
| Don't know | 85 |

Q6. How satisfied or dissatisfied are you with the value for money of 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 | 85 |

**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 of 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 | 85 |

**ASK ALL DISSATISFIED (CODED 4 OR 5) AT Q6 AND/OR Q7**

Q8. Why do you think you don't get value for money from your Water [and/or sewerage] services? **DO NOT READ OUT. MULTICODE**

| | |
|---|---|
| Cost/prices have risen | 1 |
| Rates are unfair/should depend on size of household | 2 |
| Poor/inefficient service/issues not resolved | 3 |
| Poor water quality | 4 |
| Problems with sewers/drains | 5 |
| Leaking pipes | 6 |
| Water meter issues/problems | 7 |
| Other (specify) | 80 |
| Don't know | 85 |

**ASK ALL**

Q9. We would like to ask you a couple of questions about your gas and electricity suppliers. Does the same company provide your gas and electricity?

| | |
|---|---|
| Yes – both gas and electricity from same company | 1 |
| No – gas and electricity from separate companies | 2 |
| Don't have mains gas | 3 |
| Don't know | 85 |

Q10 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, 85= don't know 89= not applicable.

a) Your energy supplier (gas and electricity)
b) Your gas supplier **[IF SEPARATE COMPANIES AT Q9]**
c) Your electricity supplier **[IF NO MAINS GAS/SEPARATE COMPANIES AT Q9]**
d) Your telephone landline supplier
e) Council Tax

**ASK Q11 IF CODE IS HIGHER FOR Q10a/b/c THAN Q6 OR Q7**

Q11 Why do you say that you are more satisfied with the value for money from your energy (gas/electricity – IF SEPARATE SUPPLIERS/NO MAINS GAS AT Q9a) supplier than the value for money from your water [and sewerage] services? **DO NOT READ OUT. MULTICODE**

| | |
|---|---|
| Cheaper/better value | 1 |
| Able to switch | 2 |
| Better service | 3 |
| No complaints/problems | 4 |
| Fixed rate from energy supplier | 5 |
| More information/communication | 6 |
| Other (specify) | 80 |
| Don't know | 85 |

**ASK ALL**

Q12 How much do you agree or disagree that the water [and sewerage] charges that you pay are fair? **SINGLE CODE**

| | | |
|---|---|---|
| Strongly agree | 1 | **Q14** |
| Tend to agree | 2 | **Q14** |
| Neither agree nor disagree | 3 | **Q14** |
| Tend to disagree | 4 | **Q13** |
| Strongly disagree | 5 | **Q13** |
| Don't know | 85 | **Q14** |

**ASK Q13 IF DISAGREE AT Q12 (CODES 4-5)**

Q13. Why do you think that the water [and sewerage] charges that you pay are unfair? **DO NOT READ OUT. MULTICODE**

| | |
|---|---|
| Expensive/prices have risen | 1 |
| Rates are unfair/should depend on size of household | 2 |
| Profits/shareholder paid too much | 3 |
| Poor/inefficient service | 4 |
| Poor water quality | 5 |
| Other (specify) | 80 |
| Don't know | 85 |

**ASK ALL**

Q14. How much do you agree or disagree that the water [and sewerage] charges that you pay for are affordable to you? **SINGLE CODE**

| | |
|---|---|
| Strongly agree | 1 |
| Tend to agree | 2 |
| Neither agree nor disagree | 3 |
| Tend to disagree | 4 |
| Strongly disagree | 5 |
| Don't know | 85 |

## SECTION B - CONSUMER RIGHTS & RESPONSIBILITIES

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 | 85 |

Q16. Does your household have a water meter? **SINGLE CODE**

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Don't know | 85 |

Q17. Were you aware that ...: **SINGLE CODE FOR EACH STATEMENT**

Scale:

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Don't know | 85 |

a) When requested, water meters are fitted free of charge

b) If you ask for a meter to be fitted, 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 a water rate charge for your property. There are no extra charges made for trialling this service. **[DO NOT ASK OF VWSE – CODE 17 AT Q4a]**

**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 (Welsh Water Assist - IF CODE 2 AT Q4a)? 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 | 1 |
| Yes, have subscribed to it | 2 |
| No, but would like to know more | 3 |
| No, but do not need it | 4 |
| Don't know | 85 |

**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 | 1 |
| Yes, have subscribed to it | 2 |
| No, but would like to know more | 3 |
| No, but do not need it | 4 |
| Don't know | 85 |

**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**

Q20. 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 | 85 |

**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**

Q21. Have you contacted your water [and/or sewerage] company to make an enquiry in the past 12 months? **SINGLE CODE**

| | | |
|---|---|---|
| Yes | 1 | **Q22** |
| No | 2 | **Q23** |
| Don't know | 85 | **Q23** |

**ASK IF YES AT Q21**

Q22. Why did you contact them?
**DO NOT READ OUT. MULTICODE**

| | | |
|---|---|---|
| To make a complaint | 1 | **Q27** |
| To make an enquiry relating to drought/water shortage | 2 | **Q23** |
| To make an enquiry relating to flooding | 3 | **Q23** |
| Billing enquiry | 4 | **Q23** |
| Other (please specify) | 80 | **Q23** |
| Don't know | 85 | **Q23** |

**DO NOT ASK THOSE CODED 1 AT Q22**

Q23. Have you made a complaint to your water [and/or sewerage] company in the past 12 months?
**SINGLE CODE**

| | | |
|---|---|---|
| Yes | 1 | **Q27** |
| No | 2 | **Q31** |
| Don't know | 85 | **Q31** |

**ASK IF YES AT Q21**

Q24. 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, 85= don't know 89= 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 query 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

**ASK ALL CODED 1 AT Q21**
Q25. 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 | **Q31** |
| Fairly satisfied | 2 | **Q31** |
| Neither satisfied nor dissatisfied | 3 | **Q26** |
| Fairly dissatisfied | 4 | **Q26** |
| Very dissatisfied | 5 | **Q26** |
| Don't know | 85 | **Q31** |

**ASK ALL CODED AS 3, 4 OR 5 AT Q25. OTHERS GO TO Q31**
Q26. You weren't satisfied, please could you say why? **PROBE FULLY & WRITE IN**

Please specify

……………………………………………………………………………………………………………………………

Don't know 85

**ASK ALL CODED 1 AT Q22 OR CODED 1 AT Q23. OTHERS GO TO Q31**
Q27. How satisfied were you with:
Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85= don't know
**READ OUT EACH STATEMENT & SINGLE CODE**

a) The speed of response to your complaint initially
b) How well the company dealt with your concerns
c) The knowledge and professionalism of staff
d) The feeling that your complaint had been, or would be, dealt with
e) The way that the water company has kept you informed of progress with your complaint (and/or) claim
f) Action taken as a result of your complaint to prevent the problem re-occurring

Q28. Taking all those aspects into account, overall how satisfied or dissatisfied were you with the way your complaint was handled by your water [and/or sewerage] company?
**SINGLE CODE**

| | | |
|---|---|---|
| Very satisfied | 1 | **Q30a** |
| Fairly satisfied | 2 | **Q30a** |
| Neither satisfied nor dissatisfied | 3 | **Q29** |

| | | |
|---|---|---|
| Fairly dissatisfied | 4 | **Q29** |
| Very dissatisfied | 5 | **Q29** |
| Don't know | 85 | **Q30a** |

**ASK ALL CODED 3,4 OR 5 AT Q28. OTHERS GO TO Q31**

Q29. How would you have changed the way that your complaint was dealt with? **DO NOT READ OUT.**

| | |
|---|---|
| More information/communication | 1 |
| Issue should have been dealt with/resolved | 2 |
| Staff more understanding/sympathetic | 3 |
| Staff more knowledgeable/experienced | 4 |
| Quicker service | 5 |
| Staff should listen/seem more interested | 6 |
| Other **(PLEASE SPECIFY)** | 80 |
| Don't know | 85 |

**ASK ALL CODED 1 AT Q22 OR CODED 1 AT Q23. OTHERS GO TO Q31**

Q30a Was your complaint referred to another organisation to handle?

| | | |
|---|---|---|
| Yes | 1 | **Q30aa** |
| No | 2 | **Q30c** |
| Don't know | 85 | **Q30c** |

**ASK IF CODED 1 AT Q30a**

Q30aa Could you name the organisation?

........................................................................................................................................

**ASK IF CODED 1 AT Q30a**

Q30b. How satisfied were you with the way the organisation handled your complaint?

| | |
|---|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Fairly dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don't know | 85 |

**ASK ALL CODED NO AT Q30a. OTHERS GO TO Q3**

Q30c. In your opinion, do you feel that the complaint has been resolved?

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Don't know | 85 |

**ASK IF NO AT Q30c. OTHERS GO TO Q31**

Q30d. What further action, if any, did you take?

........................................................................................................................................

| | |
|---|---|
| Did not take any further action | 1 |

## SECTION C – ENERGY SUPPLIERS BENCHMARK

**ASK ALL**

Q31. Have you made a complaint to your energy [gas or electricity] supplier(s) in the last 12 months?

| | |
|---|---|
| Yes – Energy | 1 |
| Yes – Gas | 2 |
| Yes – Electricity | 3 |
| No | 4 |
| Don't know | 85 |

**ASK ALL CODING 2 OR 3 AT Q31 (MADE A COMPLAINT TO GAS/ELECTRICITY SUPPLIER)**

Q32. Which was the most recent complaint you made?

| | |
|---|---|
| Gas | 1 |
| Electricity | 2 |

**Interviewer Note: Please ask respondent to concentrate on most recent complaint made.**

**ASK ALL CODED 1 OR 2 AT Q31. OTHERS GO TO Q37**

Q33. How satisfied were you with:
Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85= don't know. **READ OUT EACH STATEMENT, SINGLE CODE**

a) The speed of response to your complaint initially
b) How well the company dealt with your concerns
c) The knowledge and professionalism of staff
d) The feeling that your complaint had been, or would be, dealt with
e) The way that the energy company has kept you informed of progress with your complaint (and/or) claim
f) Action taken as a result of your complaint to prevent the problem re-occurring

Q34. Taking all those aspects into account, overall how satisfied or dissatisfied were you with the way your complaint was handled by your energy company? **SINGLE CODE**

| | |
|---|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Fairly dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don't know | 85 |

**ASK ALL CODED 1 OR 2 AT Q31a. OTHERS GO TO Q37**

Q35a. Was your complaint then referred to another organisation to handle?

| | | |
|---|---|---|
| Yes | 1 | **Q35aa** |
| No | 2 | **Q36a** |
| Don't know | 85 | **Q36a** |

**ASK IF CODED 1 AT Q35a**

Q35aa Could you name the organisation?

..............................................................................................................................

**ASK ALL CODED 1 AT Q35a. OTHERS GO TO Q37**

Q35b. How satisfied were you with the way the organisation handled your complaint?

| | |
|---|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Fairly dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don’t know | 85 |

**ASK ALL CODED NO AT Q35a. OTHERS GO TO Q37**

Q36a. In your opinion, do you feel that the complaint has been resolved?

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Don't know | 85 |

**ASK IF NO AT Q36a. OTHERS GO TO Q37**

Q36b. What further action, if any, did you take?

.......................................................................................................................................

| | |
|---|---|
| Did not take any further action | 1 |

## SECTION D – WATER ON TAP

**ASK ALL**

Q37. 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, 85= don't know 89= 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 |

Q38. 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 | 85 |

**ASK ALL**

Q39. What 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) | 80 |
| Nothing | 89 |
| Don't know | 85 |

Q40. How have you been made aware, if at all, of any campaigns to use water wisely in the past 12 months? **READ OUT. MULTICODE**.

| | |
|---|---|
| Television | 1 |
| Billboards | 2 |
| Radio | 3 |
| Leaflets | 4 |
| Mail from water companies | 5 |
| Newspapers/magazines | 6 |
| Other (please specify) | 80 |
| Not aware of any campaigns to use water wisely | 89 |
| Don't know | 85 |

## SECTION E – KEEPING IT CLEAN

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 | 87 |
| Don't know | 85 |

**INTERVIEWER NOTE: If asked, none of these are acceptable**

**DO NOT ASK IF CODE 2 AT Q4B OR 11 AT Q4C (SEPTIC TANK)**

Q42. How satisfied are you with your sewerage company's management of the following aspects of their service:
Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 85= don't know 89= 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)**

Q43a. 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 | 85 |

**ASK ALL**

Q43b. How satisfied are you with the services you receive from your…? **READ OUT EACH SERVICE & SINGLE CODE**

Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 85= don't know 89= not applicable.

a) Your energy supplier
b) Your gas supplier **[IF SEPARATE COMPANIES AT Q9]**
c) Your electricity supplier **[IF NO MAINS GAS/SEPARATE COMPANIES AT Q9]**
d) Your telephone landline supplier
e) Council Tax

Q44. 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 | 85 |

Q45. 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 | 85 |

Q46. 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

[ ] [ ]

Q47. 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

[ ] [ ]

## SECTION F – SPEAKING UP FOR WATER CONSUMERS

Q48. 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 | **Q50** |
| Ofwat | 2 | **Q49** |
| Other (specify) | 80 | **Q49** |
| Don't know | 85 | **Q49** |

**ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER NOT NAMED AT Q48. OTHERS GO TO Q51**

Q49. Had you heard of the Consumer Council for Water (CCWater) before now?

| | | |
|---|---|---|
| Yes | 1 | **Q50** |
| No | 2 | **Q51** |
| Don't know | 85 | **Q51** |

**ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER MENTIONED AT Q48, OR CODED 1 AT Q49. OTHERS GO TO Q51**

Q50. What, if anything, do you know about the Consumer Council for Water (CCWater)?
**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) | 80 |
| Nothing/not sure | 89 |

**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**

Q51. 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 | 85 |

**ASK IF CCWATER OR CONSUMER COUNCIL FOR WATER MENTIONED AT Q48, OR CODED 1 AT Q49.**

Q52. Have you contacted the Consumer Council for Water (CCWater) in the last year?

| | | |
|---|---|---|
| Yes | 1 | **Q53** |
| No | 2 | **Q55** |
| Don't know | 85 | **Q55** |

**ASK IF YES AT Q52**

Q53. What did you last make contact about?
**DO NOT READ OUT SINGLE CODE**

| | |
|---|---|
| To ask for information | 1 |
| To comment on a service received | 2 |
| To make a complaint | 3 |
| Billing enquiry | 4 |
| Other (specify) | 80 |
| Don't know | 85 |

Q54. 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, 85= don't know 89= 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 query 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

**ASK ALL AWARE OF CCWATER (CODE 1 AT Q48 OR Q49)**

Q55. 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, 85=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

## SECTION G – BACKGROUND – ASK ALL

**For all respondents:**

Q56. Please record the gender of the respondent **DO NOT ASK**

| | |
|---|---|
| Male | 1 |
| Female | 2 |

Q57. 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 | 86 |

Q58. 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 | 80 |
| Refused | 86 |

Q59. Do you or anyone in your household have a long-term illness, health problem or disability which limits your daily activities or the work you can do?

| | |
|---|---|
| Yes (self) | 1 |
| Yes (other) | 2 |
| No | 3 |
| Don’t know/refused | 85 |

Q60. 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) | 80 |
| Refused | 86 |

Q61. What is the occupation of the main income earner in your household?
**CLASSIFY ACCORDING TO FOLLOWING OCCUPATIONAL GROUPINGS. IF PENSIONER/RETIRED PROBE FOR PREVIOUS OCCUPATION. 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 | 86 |

**ONLY ASK Q62 IF WELSH WATER CUSTOMER (CODE 2 AT Q4A) AND NOT ON WATERSURE (NOT CODED 2 AT Q18) OR IF NOT WELSH WATER CUSTOMER AND METERED (YES AT Q16) AND NOT ON WATERSURE (NOT CODED 2 AT Q18). OTHERS GO TO Q66.**

Q62. As mentioned earlier in this interview, in certain circumstances some people may be entitled to assistance with their water charges. Can I just check is anyone in your household currently receiving any benefits or tax credits?

| | | |
|---|---|---|
| Yes | 1 | **Q63** |
| No | 2 | **Q66** |

**ASK IF YES AT Q62**

Q63. And are you/someone in your household responsible for three or more children under the age of 19? (they must be in full-time education and living in your home)

| | | |
|---|---|---|
| Yes | 1 | **Q65** |
| No | 2 | **Q64** |

**ONLY ASK IF SOMEONE IN HOUSEHOLD HAS A DISABILITY OR LONG-TERM HEALTH CONDITION (CODE 1-2 AT Q59). OTHERS GO TO Q66.**

Q64. You mentioned that you/someone in your household has an illness, disability or long-term health condition. Does this medical condition mean that you have to use significant additional volumes of water?

| | | |
|---|---|---|
| Yes | 1 | **Q65** |
| No | 2 | **Q66** |

**ASK IF YES AT Q63 OR Q64**

Q65. And are you/someone in your household receiving any of the following benefits? **READ OUT**

| | |
|---|---|
| Council Tax Benefit (not the single person allowance) | 1 |
| Housing Benefit | 2 |
| Income support | 3 |
| Income-based Job Seeker's Allowance | 4 |
| Working Tax Credit | 5 |
| Child Tax Credit (other than just the family element) | 6 |
| Pension Credit | 7 |
| Income related Employment and Support Allowance | 8 |
| None of these | 87 |

**ASK ALL**

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 | 85 |
| Refused | 86 |

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 | 85 |

**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 DJS Research Ltd comply with the code of conduct you can call them on 0500 39 69 85.**

# Appendix 2 – Sample Profile

**Table 2 Sample Profile**

| | Unweighted | | Weighted | |
|---|---|---|---|---|
| | No. | % | No. | % |
| **Total** | **2012** | **100** | **2012** | **100** |
| | | | | |
| **Region** | | | | |
| Eastern | 202 | 10 | 222 | 11 |
| North West | 200 | 10 | 263 | 13 |
| Northumbria | 200 | 10 | 102 | 5 |
| Midlands | 201 | 10 | 331 | 16 |
| South West | 200 | 10 | 60 | 3 |
| Southern | 201 | 10 | 158 | 8 |
| Thames | 206 | 10 | 476 | 24 |
| Wessex | 200 | 10 | 100 | 5 |
| Yorkshire | 200 | 10 | 183 | 9 |
| Wales | 202 | 10 | 117 | 6 |
| **Age** | | | | |
| 18-34 | 222 | 11 | 197 | 10 |
| 35-44 | 514 | 26 | 477 | 24 |
| 45-60 | 576 | 29 | 610 | 30 |
| 61-74 | 500 | 25 | 523 | 26 |
| 75+ | 174 | 9 | 181 | 9 |
| Refused | 26 | 1 | 25 | 1 |
| **Gender** | | | | |
| Male | 844 | 42 | 836 | 42 |
| Female | 1168 | 58 | 1176 | 58 |
| **Household composition** | | | | |
| One person household | 342 | 17 | 381 | 19 |
| Two person household | 731 | 36 | 707 | 35 |
| One parent family | 148 | 7 | 156 | 8 |
| Two parent family | 735 | 37 | 705 | 35 |
| Other | 36 | 2 | 42 | 2 |
| Refused | 20 | 1 | 21 | 1 |
| **Meter use** | | | | |
| Meter users | 731 | 36 | 686 | 34 |
| Non users | 1270 | 63 | 1315 | 65 |
| Don't know | 11 | 1 | 11 | 1 |
| **Social grade** | | | | |
| A | 79 | 4 | 72 | 4 |
| B | 376 | 19 | 342 | 17 |
| C1 | 478 | 24 | 440 | 22 |
| C2 | 407 | 20 | 418 | 21 |
| D | 234 | 12 | 271 | 13 |
| E | 335 | 17 | 358 | 18 |
| Refused | 103 | 5 | 111 | 6 |
| **Type of water company** | | | | |
| Water and Sewerage Company (WaSC) | 1870 | 93 | 1863 | 93 |
| Water only Company (WoC) | 142 | 7 | 149 | 7 |