



Research into restrictions on the use of water (June 2012)

Commissioned by:




Report written by:
Gavin Ellison
gavin.ellison@yougov.com
0207 012 6008

YouGov[®]
What the world thinks



Contents



Executive summary	Slides 3-5
Background & method	Slides 6-7
Prioritisation of water & sewerage services	Slides 8-9
Awareness of & attitudes towards drought	Slides 10-16
Hosepipe Bans	Slides 17-19
Water Usage	Slides 20-24
Saving Water	Slides 25-27
The role of water companies	Slides 28-32
Appendices	Slides 33-35



Executive Summary

Executive summary (1)

- This summary report presents the findings from the first wave of tracking research on public attitudes to the water use restrictions imposed by some water companies in April 2012. It was commissioned by the Consumer Council for Water and delivered by YouGov through an online survey of 2,029 adults in England and Wales.
- A third of customers say that they are using less water since the announcement of hosepipe bans. This is higher in the water restriction areas (42%). Of those that are using less water, 28% say this is as a direct result of the hosepipe bans.
- Seven per cent of those living in a hosepipe ban area believe there is not a ban and similarly 8% of those living in a non-restricted area think that there is a ban there. The vast majority of people see hosepipe bans as a blanket prohibition on using hosepipes for all activities.
- Over half (54%) of those living in a water restriction area think that the drought is quite or very serious. In comparison 12% living in unrestricted areas think likewise.
- Over half (53%) believe that the recent heavy rainfall must have improved the drought situation but that there is still a drought. 13% think that it means the drought is over.
- When there is a drought or hosepipe bans are in place, around nine out of ten believe it is acceptable for water companies to ask them to reduce water consumption. However two out of five water customers find it unacceptable to be asked to reduce their usage 'all the time' or when there is not a hosepipe ban.

Executive summary (2)

- Customers are clear that most responsibility for managing the drought and conserving water lies with the water companies. 61% rank water companies as being most responsible for conserving water and they are placed ahead of the government and Environment Agency in perceptions of responsibility for managing the drought. In contrast just one in ten felt that household consumers had the most responsibility for conserving water during times of drought.
- Water customers identify the lack of rain (77%) and leaks from water pipes (77%) as being equally important causes of drought. Half (49%) believe that household consumers using too much water was also a cause of drought whilst few blamed businesses (31%), agriculture (12%), climate change (38%) or the extraction of water from rivers (31%).
- When asked what they felt water companies should be doing to avoid hosepipe bans in the future, the fixing or prevention of leaks featured most prominently, others mentioned the moving of water around the country and general investment in infrastructure.
- Customers are more likely to say that water companies are not doing enough to fix leaks, capture and manager resources effectively, help people use less water and reduce the chance of hosepipe bans being introduced. Nonetheless, many customers (60%) agree that water companies are doing enough to provide a reliable supply of water to households.
- TV news dominates the sources of information about hosepipe bans and is considered a trusted source of information. 27% of those in a hosepipe ban area had heard information through their water company, but this was only the 7th most used source of information, behind others such as local and national newspapers, radio and the internet.
- Relatively few are willing to pay more to avoid hosepipe bans in the future, the majority (78%) are unwilling to pay anything . The avoidance of hosepipe bans specifically is rated as a low priority when people consider a range of water and sewerage services but many (72%) stress the importance of a reliable basic service. More focus on taste (84%) and many are concerned about affordability of bills (67%).



Background and method

Background and method

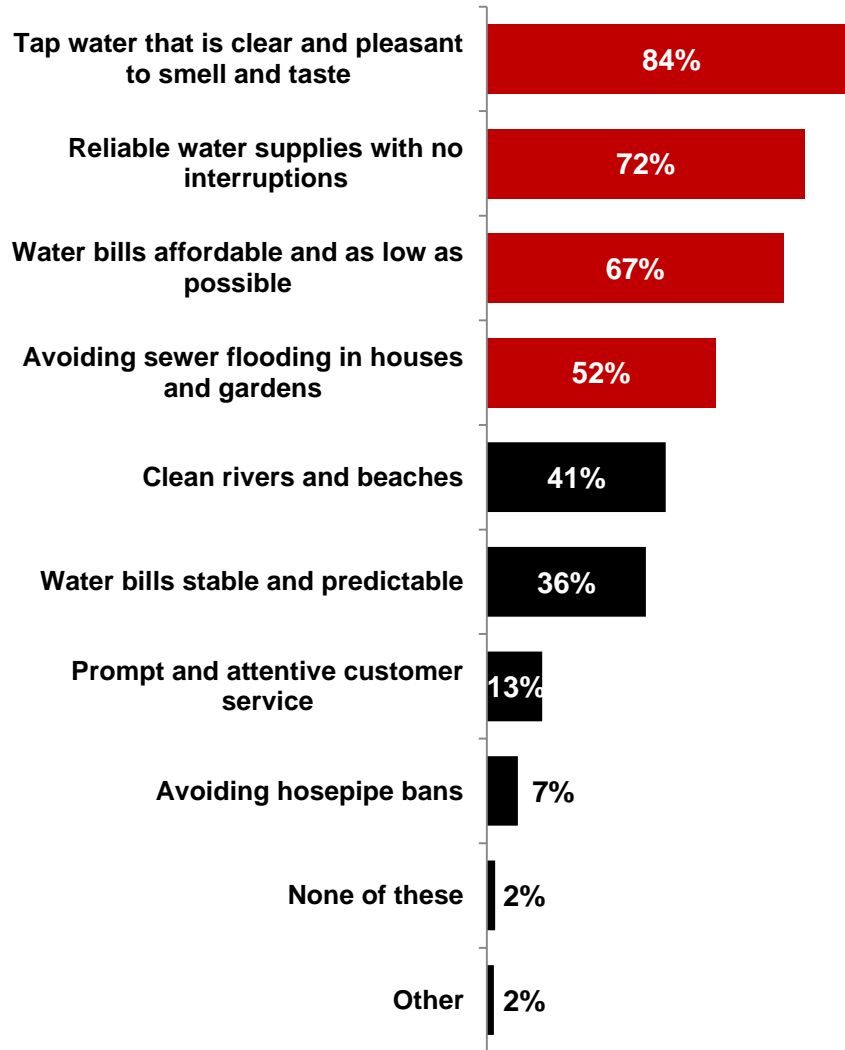
- This summary report presents the findings from the first wave of tracking research on public attitudes to the water use restrictions imposed by some water companies in April 2012. It was commissioned by the Consumer Council for Water and delivered by YouGov.
- A survey questionnaire was developed by YouGov and the Consumer Council for Water to test public awareness of drought and water use restrictions, perceptions of their causes and where responsibility should lie for saving water. It explores water saving behaviour and intentions, where consumers receive information about water use restrictions, their awareness and usage of water saving devices and what they as consumers and water companies as suppliers can do to manage the consequences of drought.
- A total of 2,029 adults (18+) were surveyed online between the 10th – 15th May 2012 across England and Wales with the results weighted to be representative by age, gender, region and social class. Respondents were drawn at random from the YouGov panel of over 350,000 adults living in England and Wales. A number of key demographic and behavioural differences were analysed including: the presence of a water meter at the property, whether the respondent was a water bill payer, whether they had a disability or impairment, whether they lived in a hosepipe ban area, which water only or water and sewerage company area they live in, whether there is a garden at their property and if it is in a urban or rural location. A breakdown of the sample composition is provided in the appendices.
- During the fieldwork period the drought status was lifted in Yorkshire and the Midlands. This announcement was covered in the national news media and in response we placed a marker which allows the results to be split between those completed before and after the announcement. Forty-six per cent of the responses were pre-announcement and 54% post. There are few references to the results pre and post announcement in this report.



Prioritisation of water & sewerage services

Important aspects of water and sewerage services

Please choose up to four that you consider to be most important aspects of water and sewerage services.



Base: All England and Wales Adults (n=2029)

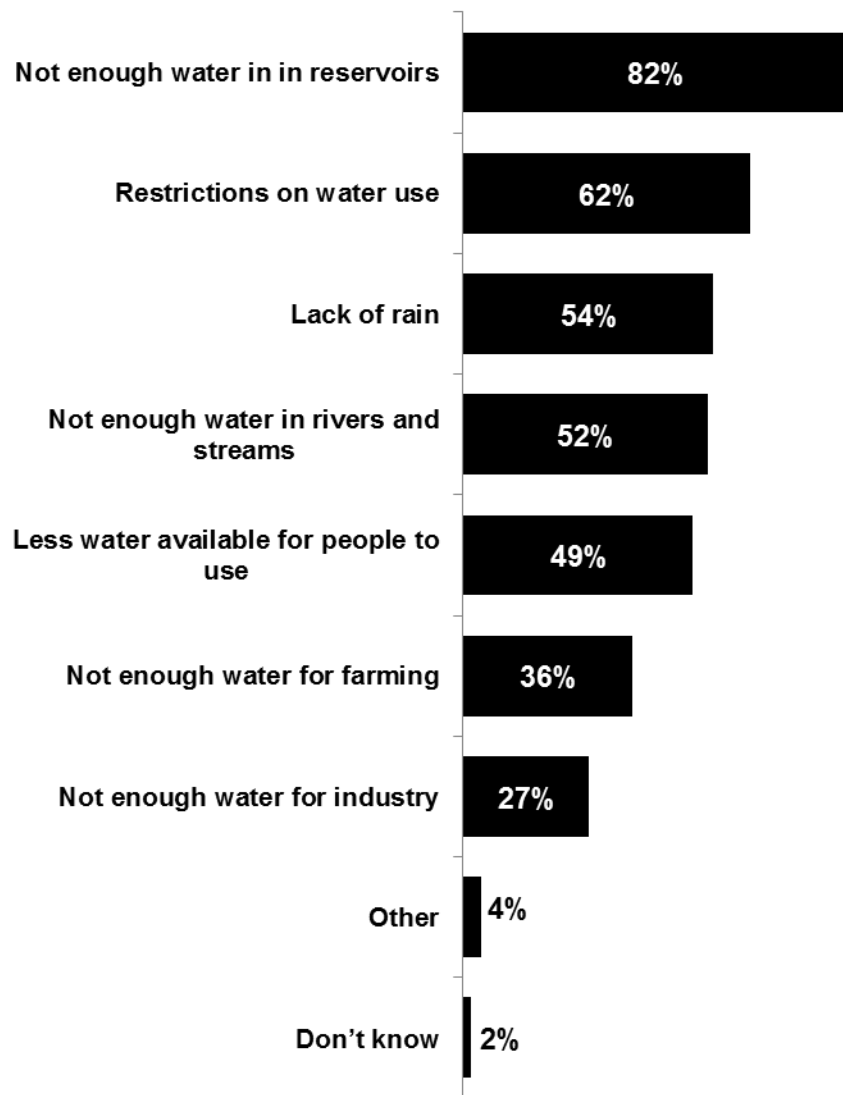
- The top four things considered to be most important aspects of water and sewerage services are 'tap water that is clear and pleasant to smell and taste' (84%), 'reliable water supplies with no interruptions' (72%), low and affordable water bills (67%) and avoidance of sewer flooding in houses and gardens (52%).
- Those whose water and sewerage services are provided by Dwr Cymru Welsh Water are significantly more likely to state clear and pleasant tap water than those whose services are provided by Thames Water (90% compared with 81%).
- Affordable and low water bills are significantly more important to Dwr Cymru customers than Northumbrian Water, Thames and Wessex Water (77% compared with 64%, 63% and 60% respectively). Respondents with a disability are also significantly more likely to state this than those without (72% compared with 67%).
- Only 7% said avoiding hosepipe bans was an important aspect and those living in a hosepipe ban area are twice as likely to state this than those who are not (10% compared with 5%). Respondents with a garden are also significantly more likely to state this than those without (8% compared with 4%).
- Respondents living within rural areas are significantly less likely to state stable and predictable water bills than those living in towns and urban areas (29% compared with 40% and 37% respectively).
- Respondents post announcement were significantly more likely to state low and affordable water bills compared with those pre announcement (70% compared with 64%).



Awareness of and attitudes towards drought

What does drought mean to you...?

When you think of there being a 'drought' in this country, which of the following do you think 'drought' means?



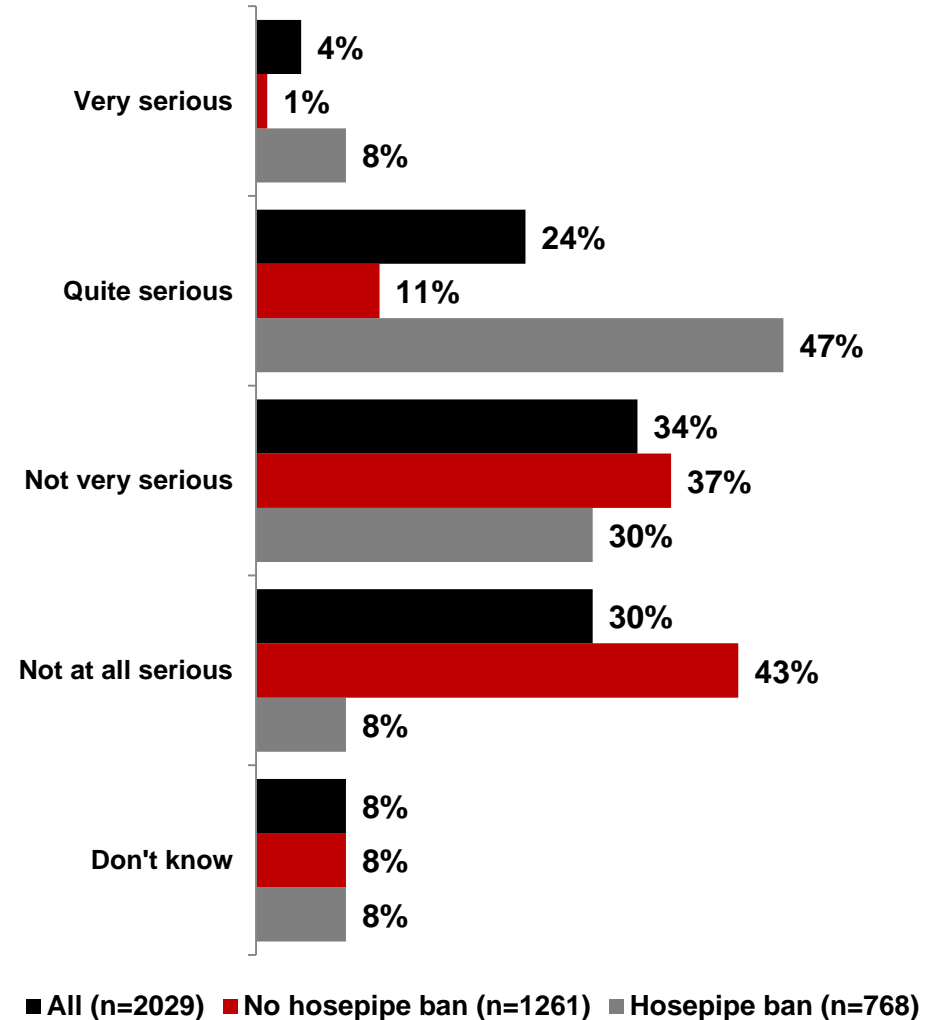
- The majority believe that drought means “not enough water in reservoirs” (82%) followed by “restrictions on water use” (62%) and “lack of rain” (54%).
- Those with a garden are significantly more likely to state the following compared with those without a garden:
 - Lack of rain (55% compared with 46%)
 - Not enough water in rivers and streams (54% compared with 44%)
 - Less water available for people to use (50% compared with 44%)
 - Not enough water for farming (38% compared with 31%)

Base: All England and Wales Adults (n=2029)

How serious do you think the drought is?

- Over a quarter (28%) think the drought in their local area is 'quite' or 'very serious', 64% believe it is 'not very' or 'not at all serious' and 8% don't know.
- As would be expected those living in a hosepipe ban area are significantly more likely to state the drought is 'quite' or 'very serious' in their local area compared with those living in an area without restrictions (54% compared with 12%).

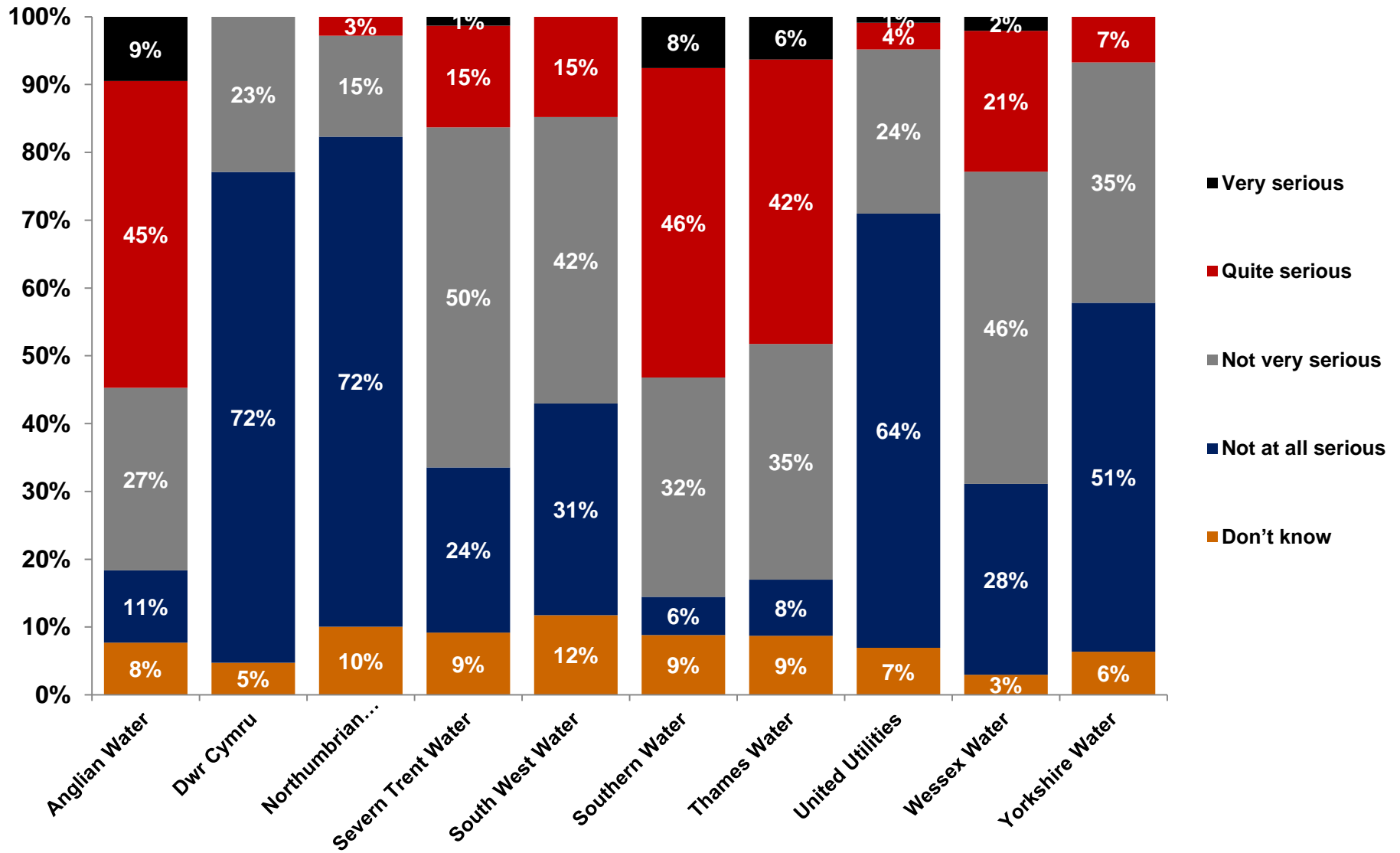
How serious do you think the drought is in your local area?



Base: All England and Wales Adults (n=2029)

How serious is the drought in your local area? (by WaSC)

How serious do you think the drought is in your local area?

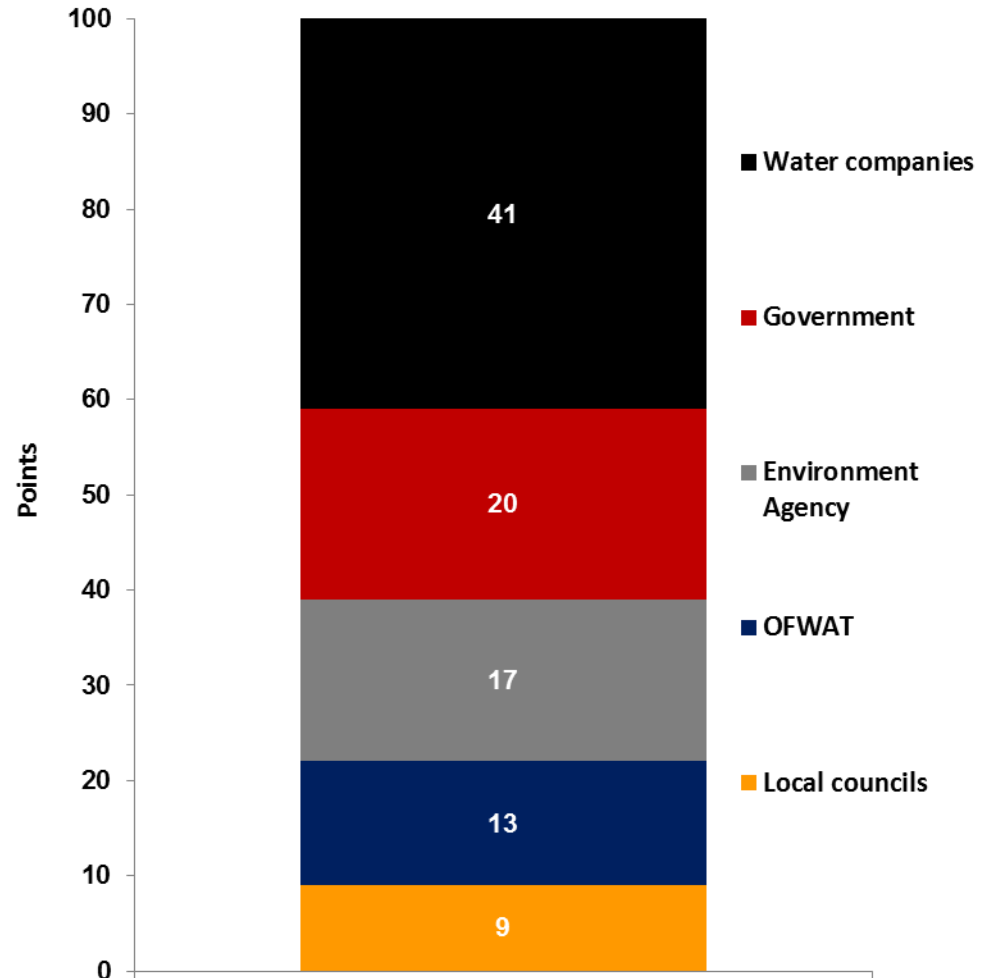


Base: All England and Wales Adults (n=2029), for numbers per WaSC see appendices

Where does the responsibility lie for managing the drought...?

- When asked to whom they would allocate responsibility for managing drought, water companies figured prominently. Second in line was Government with an average of 20 points followed by the Environment Agency with 17 points.
- With only nine points very few believed local councils should be responsible for managing the consequences of drought.
- Those with a disability are twice as likely to say the drought is very serious than those without a disability (6% compared with 3%).

How would you allocate responsibility for managing the consequences of drought. You can give 100 points in total.

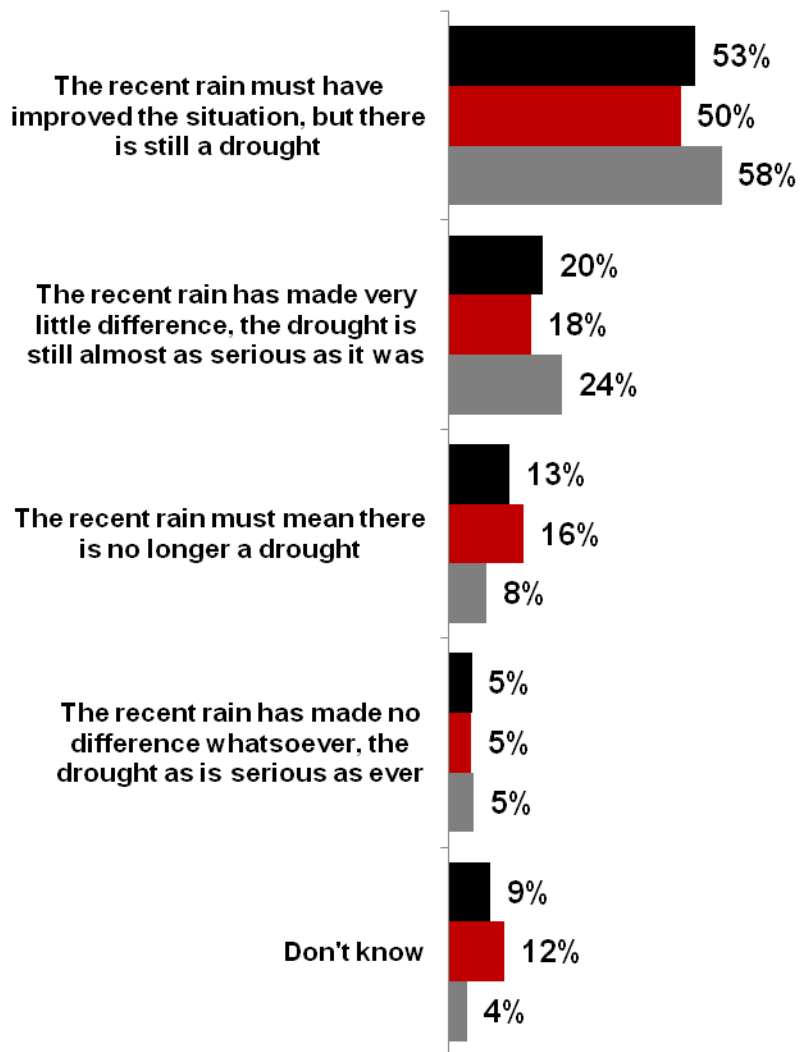


Average distribution of responsibility

Base: All England and Wales Adults (n=2029)

Impact of heavy rainfall on perceptions of drought...

Since the hosepipe bans announced in April this year there has been a great deal of rain. Which of the following statements best describes your understanding of the difference, if any, this heavy rainfall has made to the drought



■ All (n=2029) ■ No hosepipe ban (n=1261) ■ Hosepipe ban (n=768)

- Over half (53%) believe that the recent rain has improved the situation but there is still drought – those living in an area with a hosepipe ban are significantly more likely to state this than those living in an area without a hosepipe ban (58% compared with 50%).
- Respondents within the Thames water area are least likely to think that the recent rain must mean there is no longer a drought (6%) whilst those in South West water area are most likely to state this (22%).
- One in five believe the recent rain has made little difference and the drought is still almost as serious as it was – again this was more significant among those living in an area with a hosepipe ban. Older customers (55+) are also significantly more likely to state this than 18 – 24s (22% compared with 15%) and so are pre announcement respondents (25% compared with 17% post announcement).
- 13% think that the recent rain must mean that there is no longer a drought. What is interesting is that those living in an area without a hosepipe ban are significantly more likely to state this than those living in an area with a ban (16% compared with 8%). Post announcement respondents are also significantly more likely to state this (16% compared with 9% pre announcement).
- A small minority (5%) believe the recent rain has made no difference whatsoever.

Causes of drought in the UK...

The belief that leaks from water pipes are a cause rises dramatically with age, from 52% of 18-24s and 70% of 25-34 to 86% of the over 55s. It is also significantly higher among those in hosepipe ban areas (82% to 74%).

Not enough rain, especially in the winter, over the last one or two years

Leaks from water pipes

Water companies not capturing and storing rain water effectively

Population growth

Not moving water around the country to where it's needed

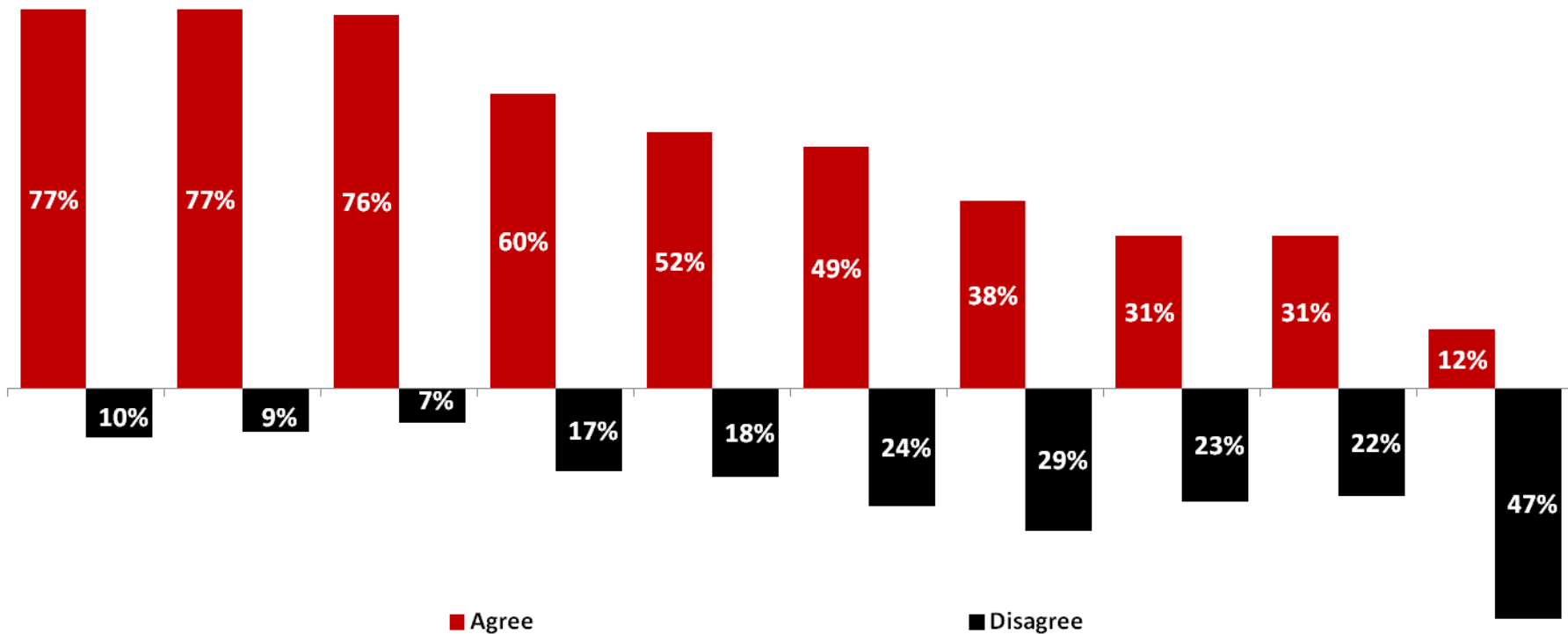
Households using too much water

Climate change

Businesses using too much water

Water companies taking too much water from rivers

Farmers using too much water



Base: All England and Wales Adults (n=2029)

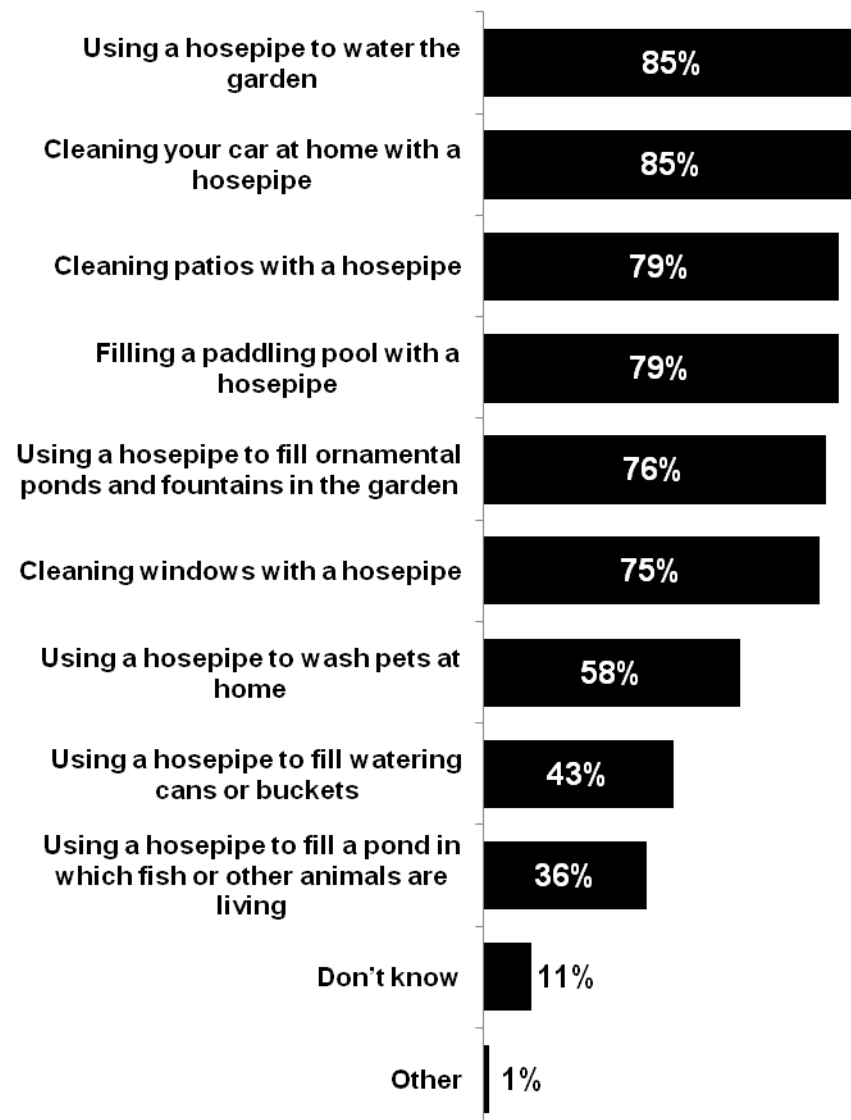


Hosepipe Bans

Hosepipe Bans...

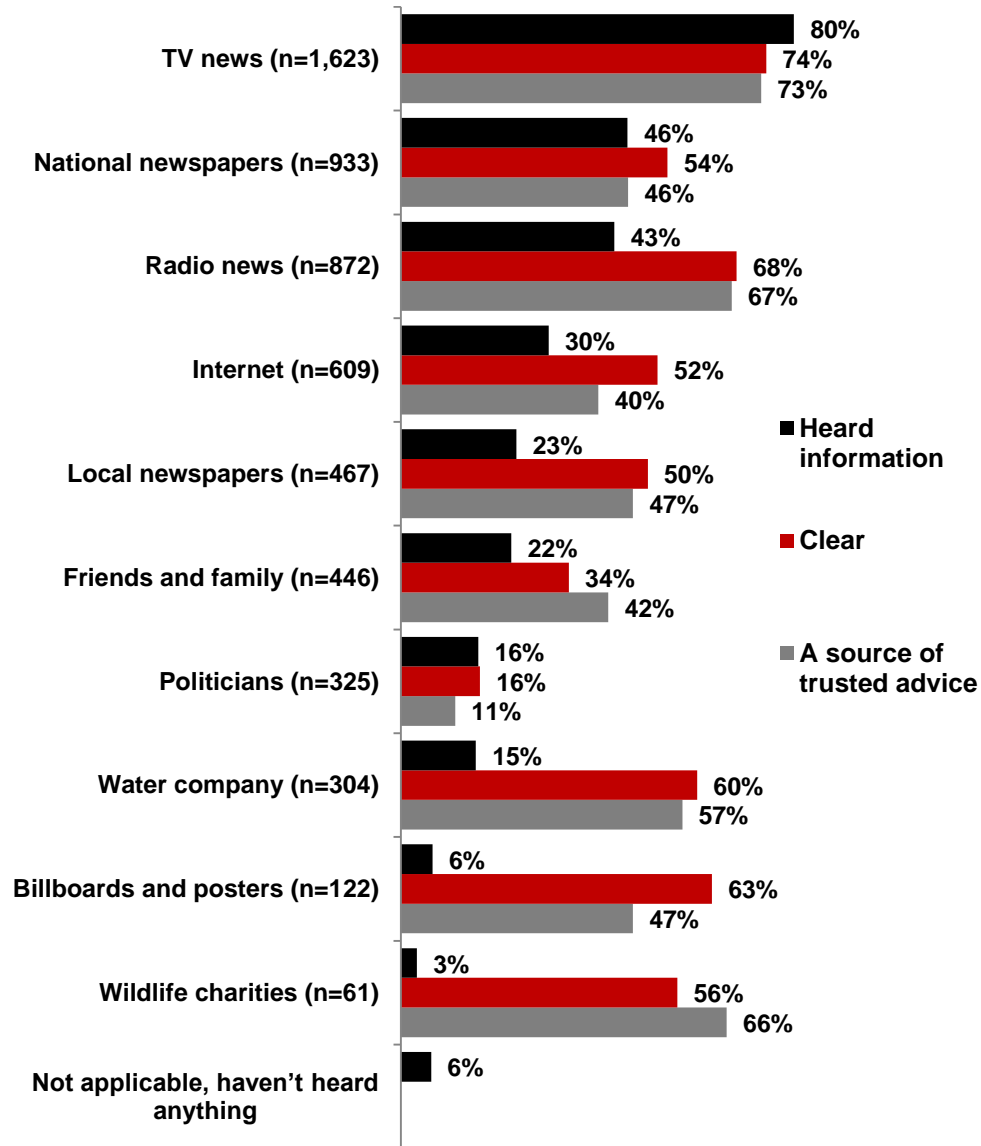
- Just over a third (35%) said there is a hosepipe ban in their area, 53% said there is not and 12% don't know.
- 7% of those living in hosepipe ban areas believe that there is not a hosepipe ban there. Similarly 8% of those in restriction-free areas think there is a hosepipe ban where they live.
- Of non-hosepipe ban areas, South West customers are the most likely to believe there is a ban there, but they still represent a small minority (6%).
- When asked what cannot be done during a hosepipe ban without prompting with a list, most believe that all uses of a hosepipe are prohibited. Others mentioned specific activities such as:
 - Washing/ cleaning car
 - Gardening
 - Domestic use
 - Filling pools/ ponds
- One in ten (11%) said they don't know what things are banned and this was significantly more common among younger customers - 22% of 18 to 24s compared with 12% of 35 to 44s, 8% of 45 to 54s and 4% of 55+.
- Significant proportions of customers think that activities such as filling ponds or watering cans are prohibited.

In those places with a hosepipe ban, what is it that you can't use a hosepipe for?



Base: All England and Wales Adults (n=2029)

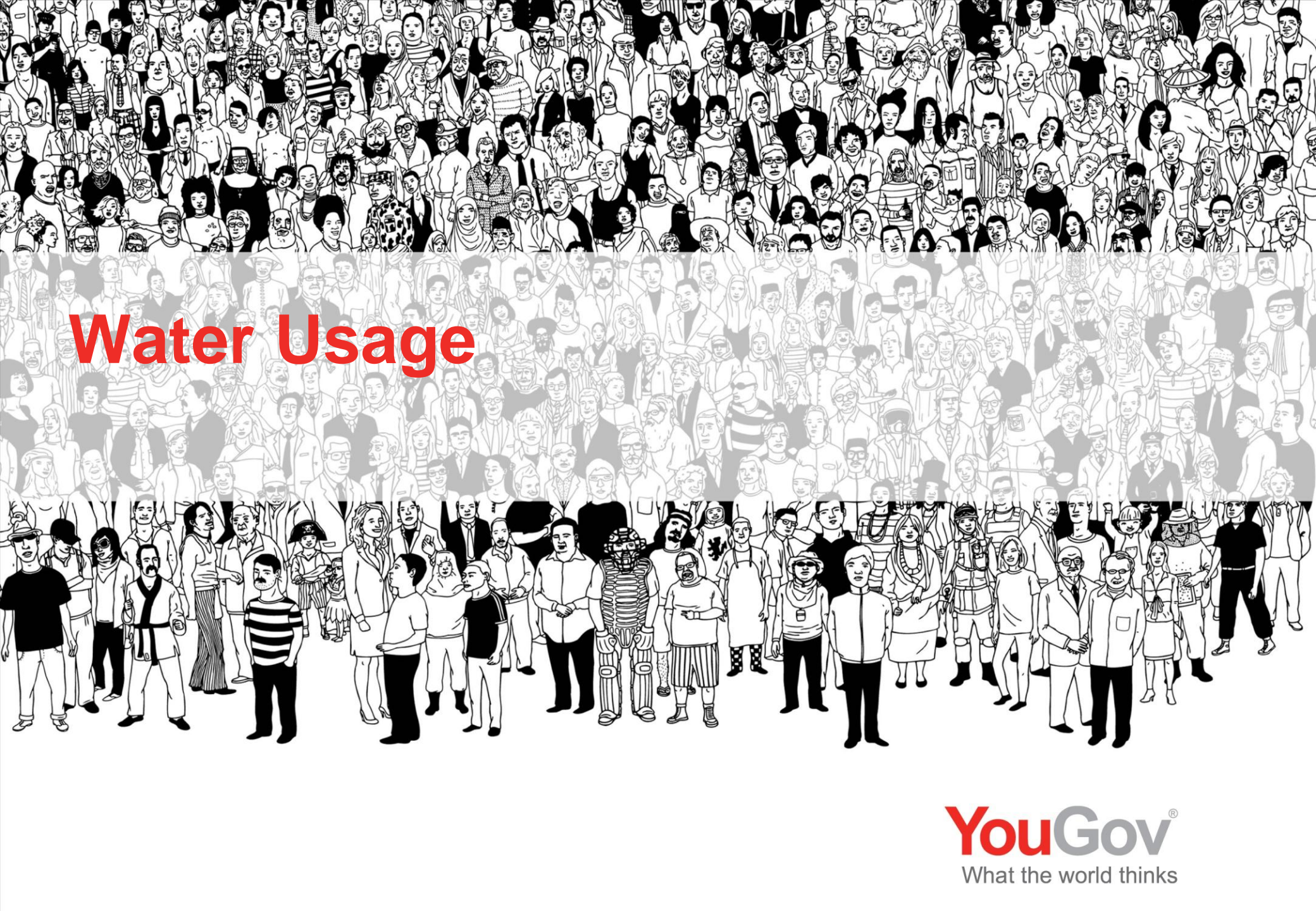
Information about hosepipe bans...



Base: All England and Wales Adults (n=2029)

From which, if any, of the following had you heard about the recent hosepipe bans? Of those you selected, which would you describe as 'clear' and 'a source of trusted advice'?

- The vast majority (80%) heard about the recent hosepipe bans from TV news and of those that did 74% feel it was clear and 73% a source of trusted advice. Those with a disability are significantly more likely to state they had heard about the bans from TV news than those without (86% compared with 79%)
- Just under half (46%) heard about the recent bans from the national newspapers but only around half regard it as clear and trusted.
- Younger customers are significantly more likely to hear about that ban through the internet – 41% of 18 to 24 compared with 27% of 55+. Just over half (52%) believe the internet is a clear source and 40% consider it to be one they can trust.
- 15% had heard information from water companies and of those, 60% feel that it has been clear and 57% regard water companies as a 'trusted source'.
- 16% heard through politicians and they had the lowest scores for clarity (16%) and trust (11%).
- Respondents pre announcement are significantly more likely to state the following sources as clear compared with post announcement:
 - National newspapers (57% compared with 49%)
 - Radio news (74% compared with 62%)
 - Water companies (69% compared with 51%)
 - Politicians (24% compared with 11%)

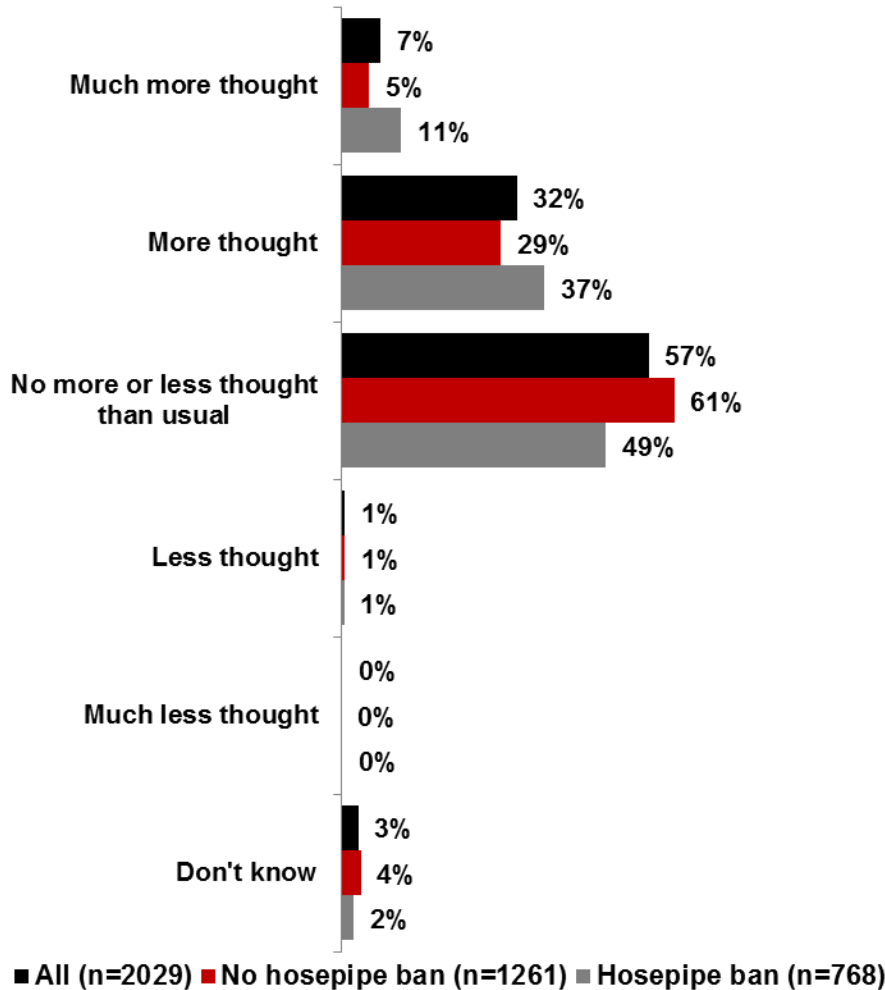


Water Usage

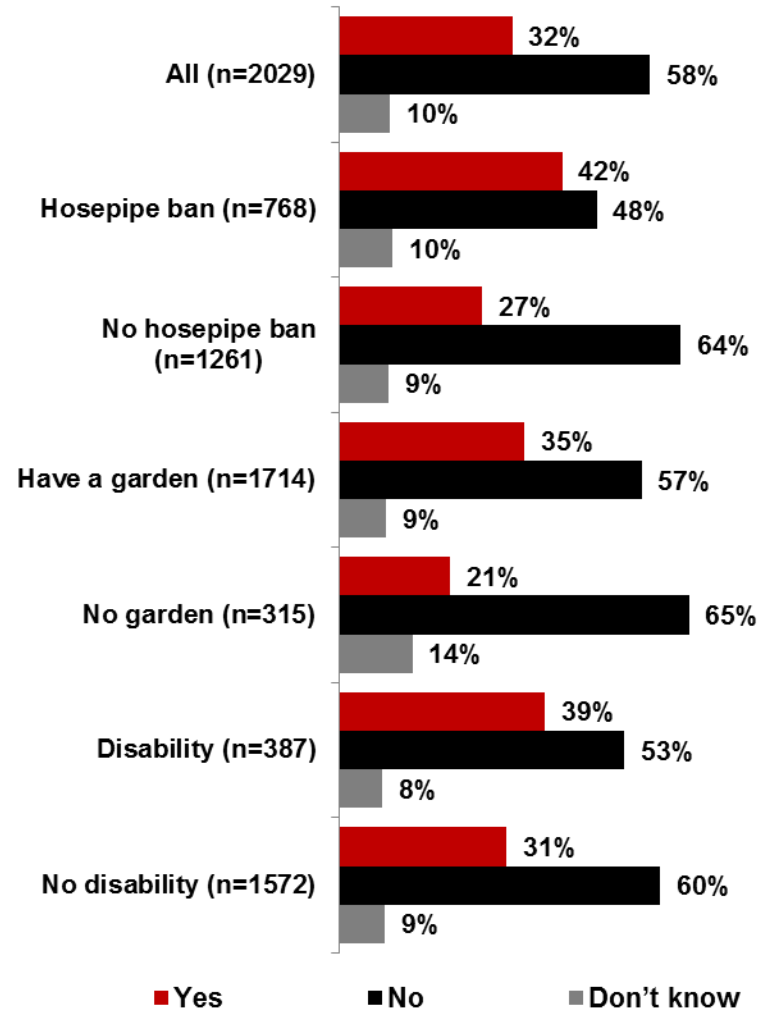
Water usage since the hosepipe bans...

Who is using less? Those who pay the bills (35% vs. 21%); older people (45% of over 55s) and women (35% vs. 29% men).

Since the hosepipe ban was announced to what extent would you say that you are giving more, less or the usual amount of thought to the amount of water your household uses?

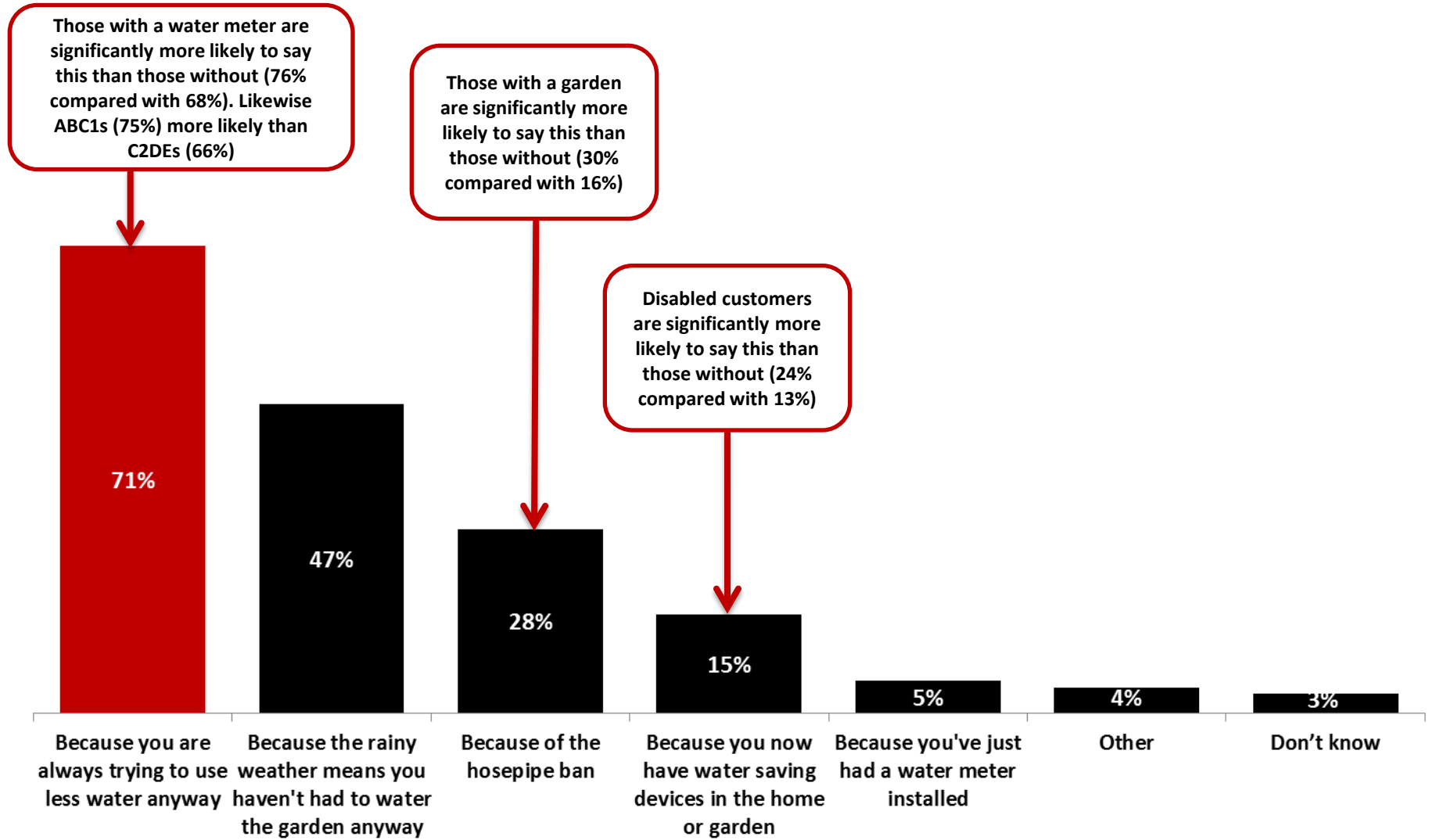


Since the hosepipe bans are announced, would you say are using less water than usual?



Why are people using less water?

For which of the following reasons, if any, have you been using less water since the hosepipe bans are announced?

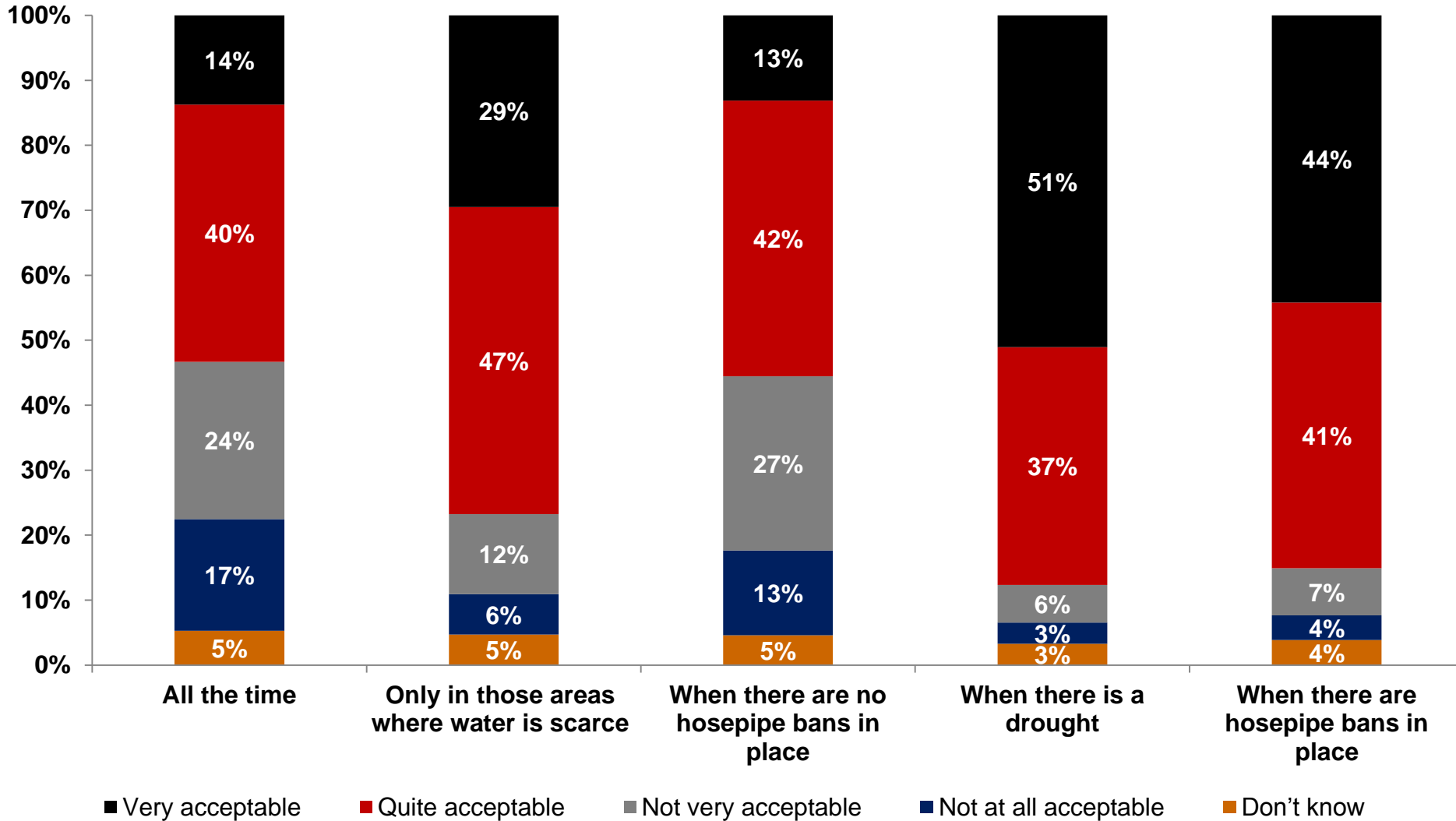


Base: All England and Wales Adults who are using less water than usual (n=685)

Water companies and reducing water

Who finds it unacceptable? Men; older people; those not in a hosepipe ban area.

How acceptable or not do you think it is for water companies to ask people to reduce their use of water in the following circumstances?



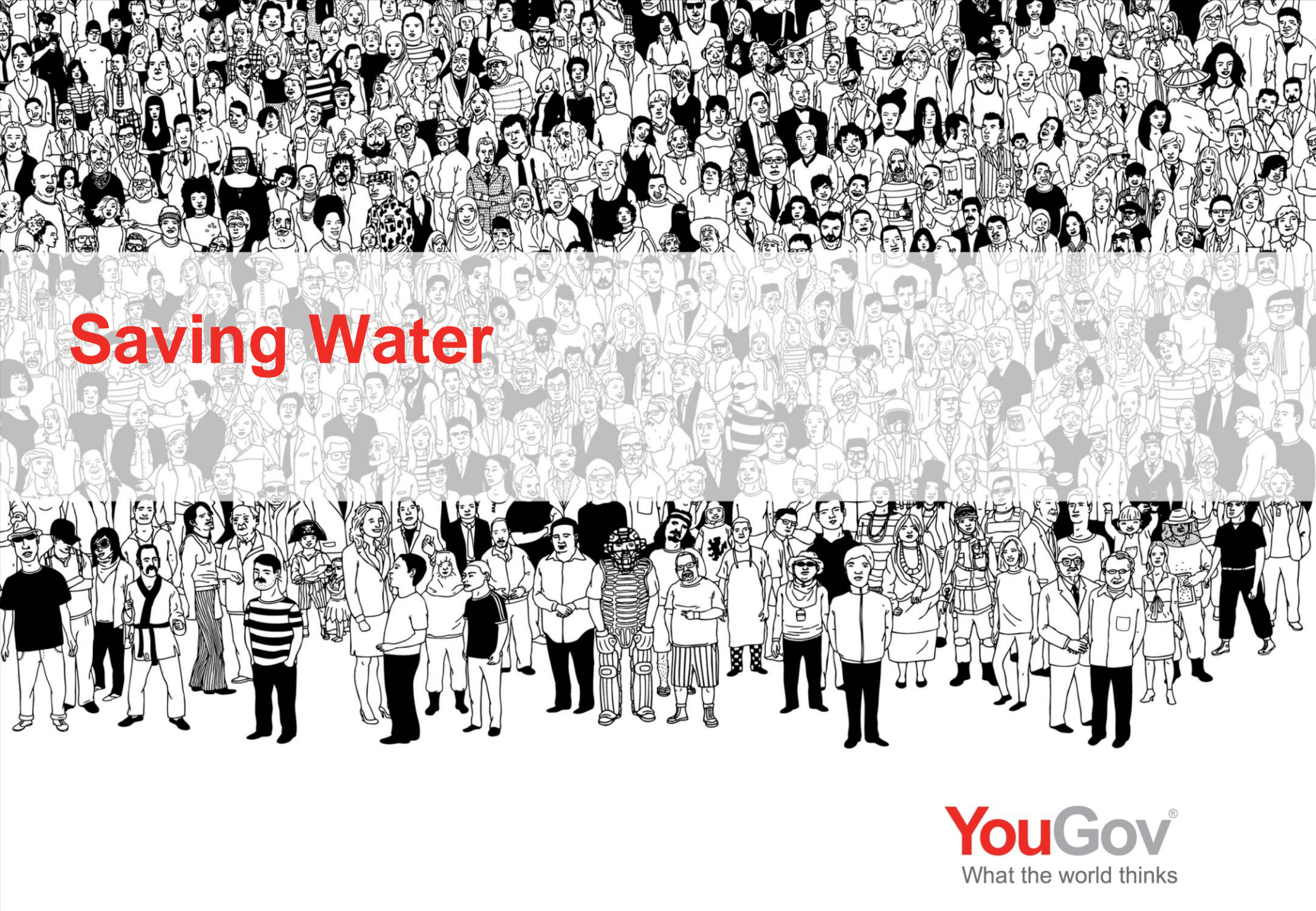
Base: All England and Wales Adults (n=2029)

Responsibility for conserving water at times of drought

Thinking about responsibility for conserving water at times of drought, please rank the following with 1 having the greatest responsibility.

	Median ranking out of 8	Ranked 1 st – most responsibility	Ranked 8 th – least responsibility
Water companies	1	61%	1%
Environment Agency	4	5%	6%
Business water customers	4	5%	3%
Government	4	12%	15%
OFWAT (the water regulator)	4	5%	15%
Household water customers	5	10%	21%
Local council	6	1%	19%
Farming / agriculture	6	1%	20%

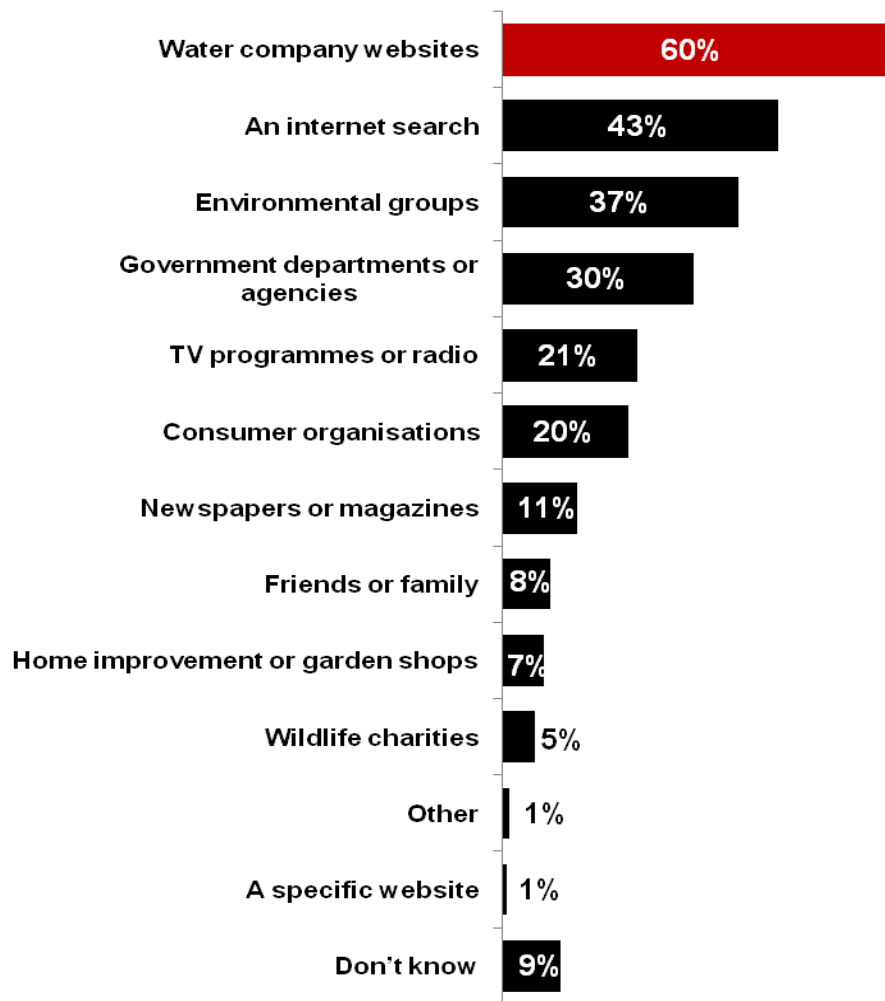
- The results indicate that responsibility for conserving water at times of drought mostly lies with water companies with 61% ranking them first. Beyond water companies follows Government, business, the Environment Agency, OFWAT and then themselves as domestic consumers. Very few believe responsibility lies with local councils and farming/agriculture.
- Younger customers (18-24) are significantly more likely to rank Government first than older people (55+) (18% compared with 9%). However it was the opposite for water companies with 66% of 55+ ranking them first compared with 39% of 18-24 year olds



Saving Water

Where to seek out information about using less water

If you wanted more information about using less water, which of the following, if any, do you think would be the best sources of information?



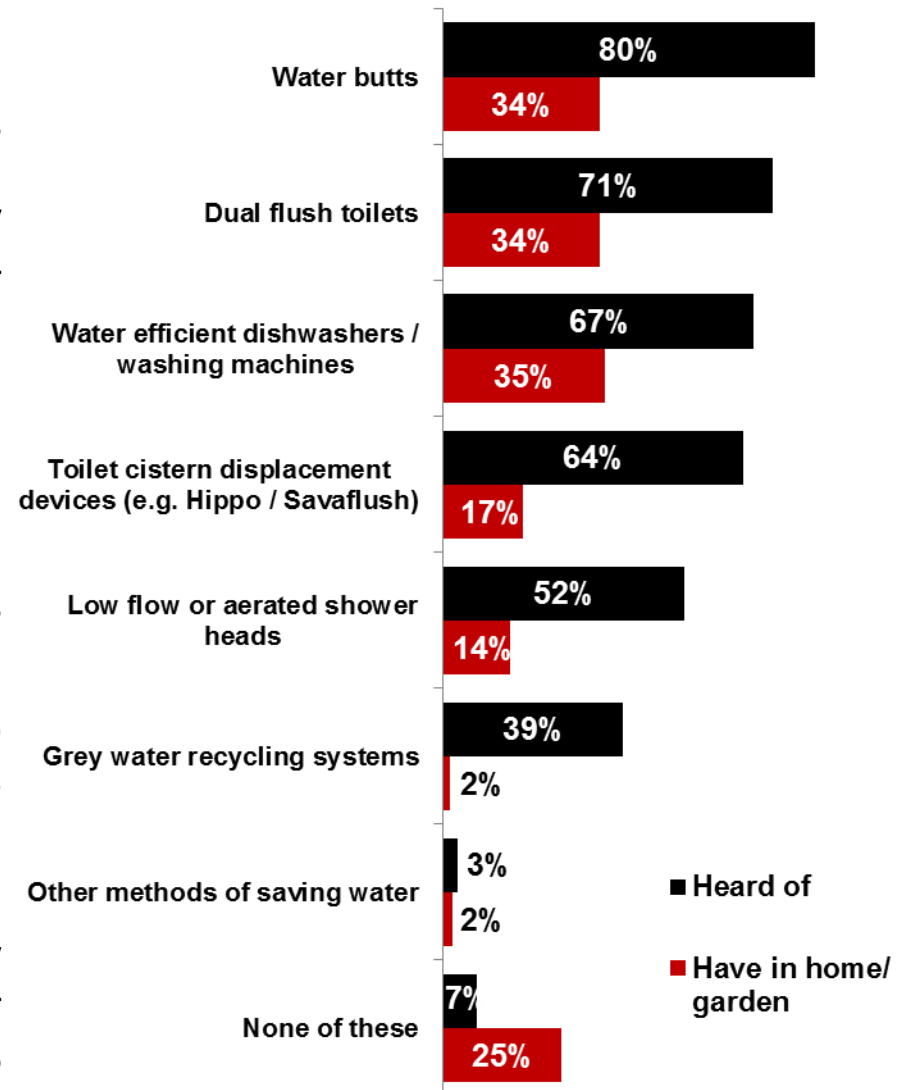
Base: All England and Wales Adults (n=2029)

- Six in ten would visit water company websites for more information on using less water, 43% would carry out a search on the internet and 37% would look to environmental groups ahead of Government departments and agencies, TV / radio or consumer organisations. TV and radio are significantly more important sources of information for disabled customers (26% compared to 20%).
- One in ten (9%) did not know where they would go to find out more information on using less water and this was far more significant among younger customers than older ones – 16% of 18-24s.
- There was evidence that having a water meter inclined customers to turn to their water company for more information (64% vs. 57% without a meter). The same applies for those with a garden.
- ABC1 customers are significantly more likely than C2DEs to use the following sources:
 - Water company website (65% compared with 54%);
 - Government departments or agencies (33% compared with 26%);
 - Consumer organisations (22% compared with 17%); and
 - Home improvement or garden shops (8% compared with 5%).

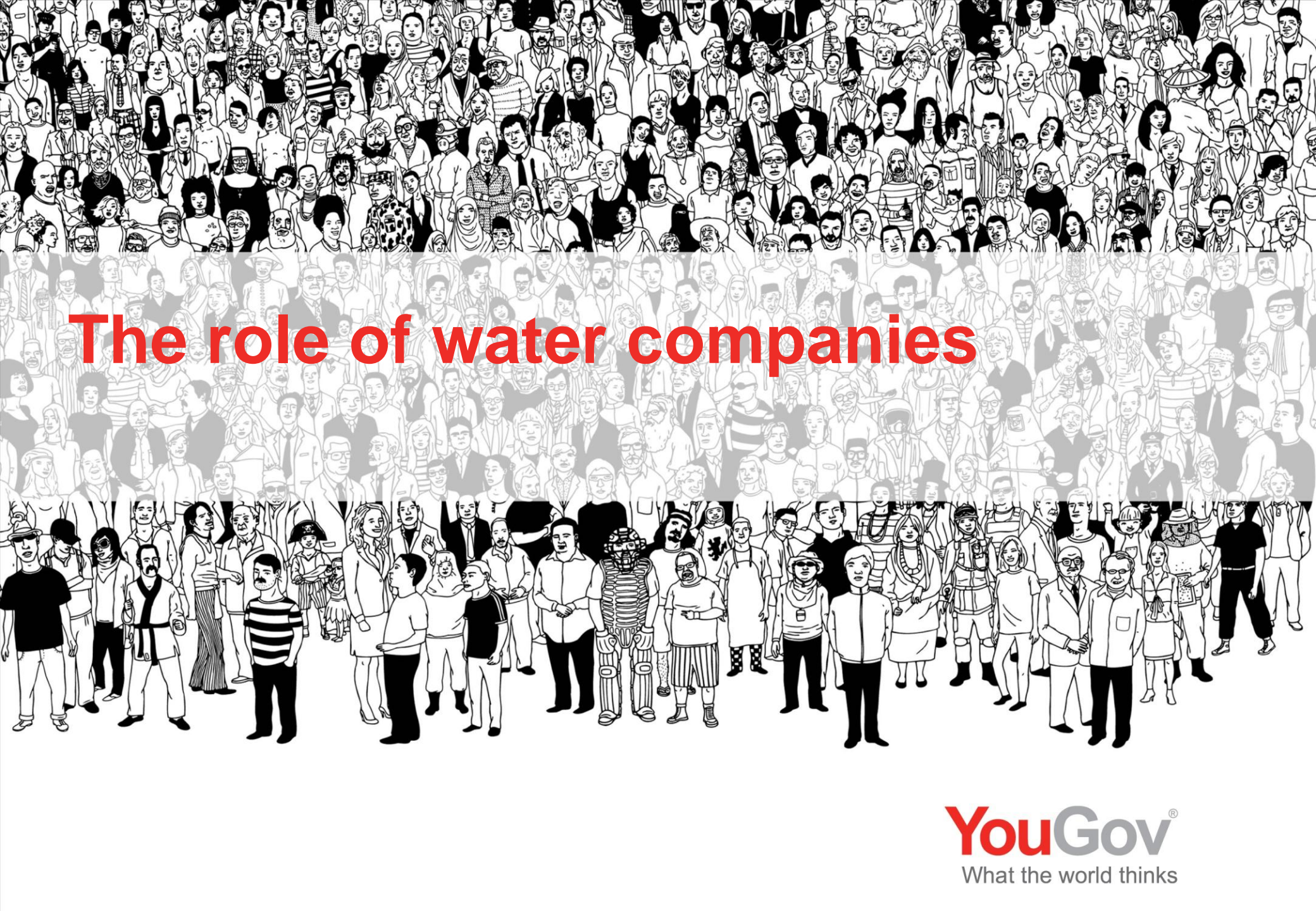
Products and services for saving water...

- When it comes to saving water, the majority have heard of water butts (80%), dual flush toilets (71%), water efficient dishwashers/ washing machines (67%) and toilet cistern displacement devices (64%). Despite having a high awareness of these products/ services, just over a third actually have them in their home/ garden and fewer have a Hippo like device.
- Customers living in a hosepipe ban area are significantly more likely to have water butts than those living in an area without a ban (37% compared with 32%). This was also the case for those living in towns and rural areas compared with urban areas (43% and 53% compared with 30%).
- Those with a garden are significantly more likely to have heard of all the water saving products/ services than those without a garden. This was also the case for older customers.
- Customers with a water meter were significantly more likely to have water saving products. For example 43% have a water butt, compared to 27% of unmetered customers.

Which, if any, of the following products and services have you heard of with regards to saving water?



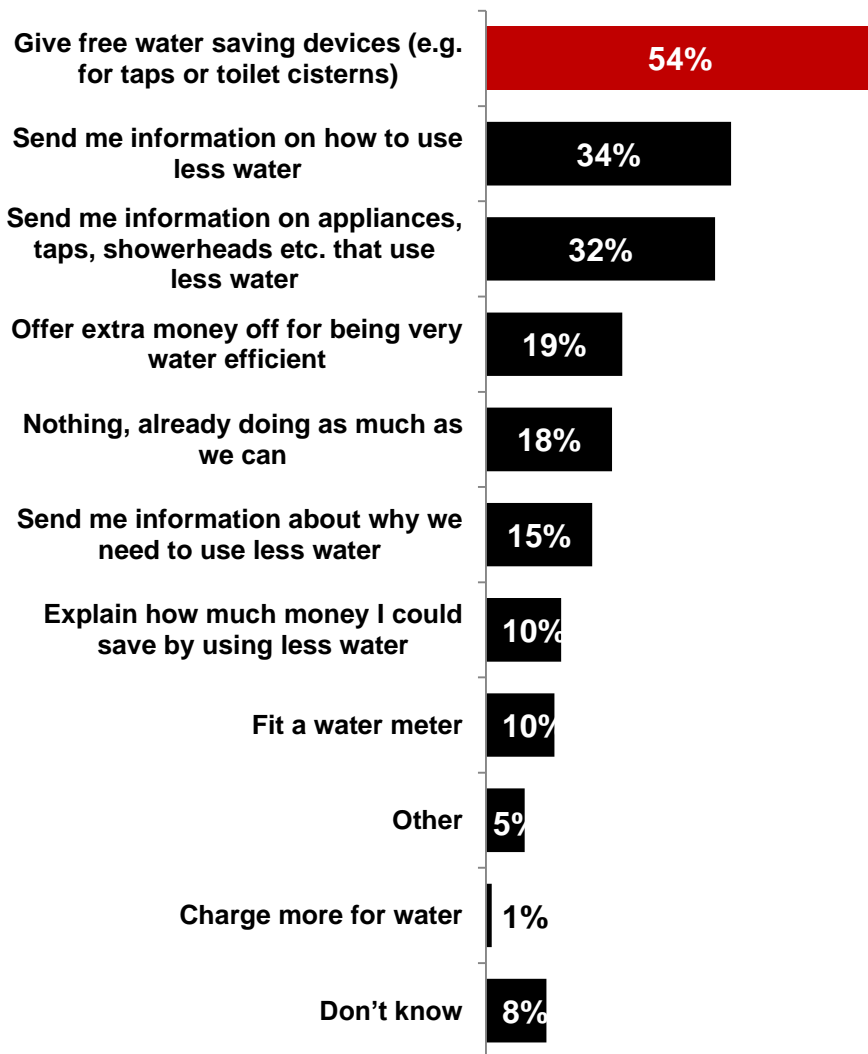
Base: All England and Wales Adults (n=2029)



The role of water companies

What can water companies do to help me use less water?

What, if anything, could your water company do to help you use less water?



- Over half (54%) believe their water company should provide them with free water saving devices and respondents living within a hosepipe ban area are significantly less likely to state this than those living in a non ban area (50% compared with 56% respectively).
- A third say water companies should provide them with more information on how to use less water (34%) and on appliances, taps, showerheads etc. that use less water (32%). Again those living within a hosepipe ban area are significantly less likely to say information should be provided (30% compared with 36%).
- One in five (18%) believe they are already doing as much as they can to reduce their water usage, particularly those living in hosepipe ban areas (21% compared with 15% living in a non ban area). Customers with a disability are significantly more likely to state they are doing as much as they can compared with those without a disability (25% compared with 16%). This was also the case for those with a garden (19% compared with 12% without a garden).

Base: All England and Wales Adults (n=2029)

Are water companies doing enough?

To what extent do you agree or disagree that your water company is doing enough to...

Provide a reliable supply of water to households

Keep you informed about the drought / hosepipe ban

Keep the hosepipe ban as short as possible

Capture and manage water resources effectively

Help people use less water

Reduce the chance of hosepipe bans being introduced

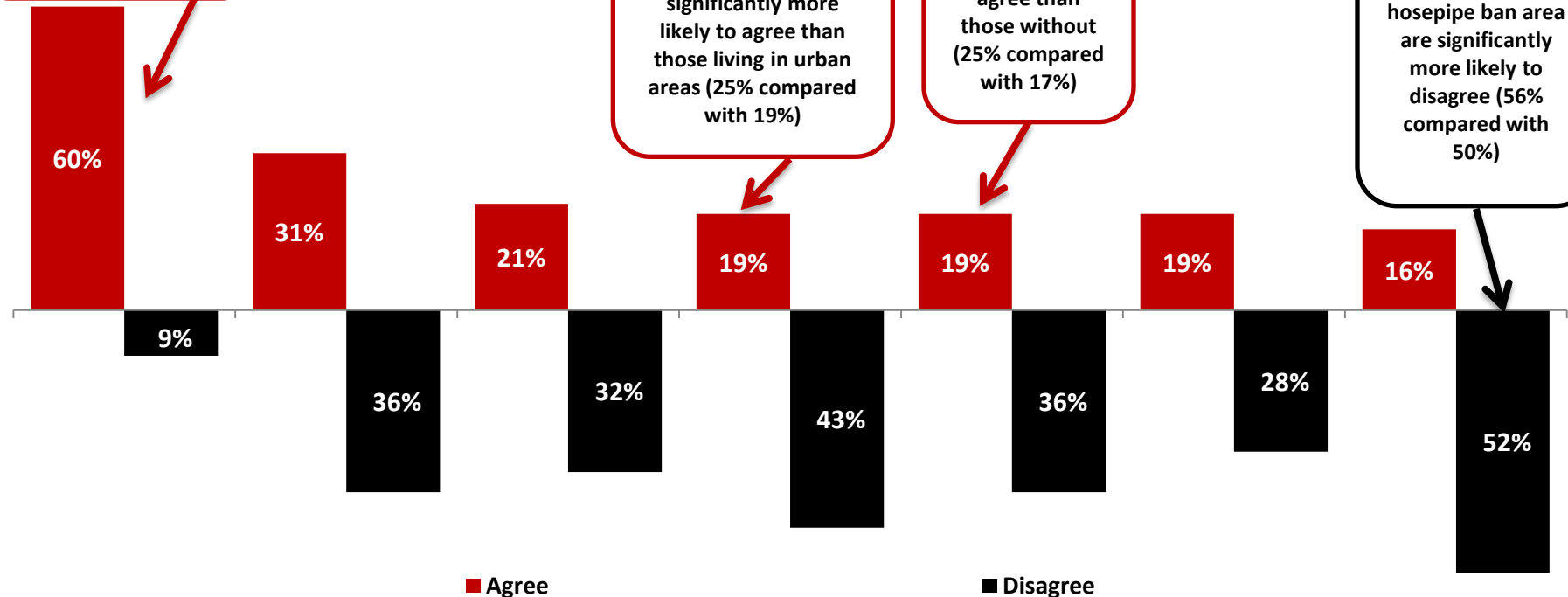
Fix leaks

Those with a garden are significantly more likely to agree than those without (62% compared with 53%)

Rural customers are significantly more likely to agree than those living in urban areas (25% compared with 19%)

Disabled customers are significantly more likely to agree than those without (25% compared with 17%)

Those living in a hosepipe ban area are significantly more likely to disagree (56% compared with 50%)



Base: All England and Wales Adults (n=2029), except 'keeping hosepipe ban as short as possible' (n=726), 'keeping you informed about hosepipe ban' (n=776) – both customers from hosepipe ban areas only. 'Reduce the chance of a hosepipe ban' (n=1303) – customers from areas without restrictions.


The most important thing water companies could do to avoid hosepipe bans in the future... (1) Fixing leaks dominates



Base: All England and Wales Adults (n=2029)

Source: www.wordle.net

The most important thing water companies could do to avoid hosepipe bans in the future... (2)



'Capture and store water more effectively'

'Build more reservoirs'

*'Cure leaks/
Fix all the leaks'*

'Plan ahead'

'Educate public and businesses on saving water'

'invest in better infrastructure'

'Fit water meters in houses'

'Move water around the country'

Base: All England and Wales Adults (n=2029)



Sample Breakdown

		Weighted (n)	Unweighted (n)
	All	2029	2029
Age	18-24	244	161
	25-34	341	302
	35-44	359	345
	45-54	355	368
	55+	730	853
Gender	Men	994	1051
	Women	1035	978
Disabled	Disability	362	387
	No disability	1591	1572
Water bill paying	Bill payer	1662	1735
	Not responsible	367	294

		Weighted (n)	Unweighted (n)
Bill size	£300 a year or less	667	693
	£301 to £500	592	612
	£501 or more	237	247
Hosepipe ban	Hosepipe ban	754	768
	No hosepipe ban	1275	1261
Garden	Garden	1684	1714
	No garden	345	315
Meter	Meter	1177	852
	No meter	1210	819
Urban / rural	Urban	1582	1577
	Town & fringe	169	177
	Rural	222	223

Sample Breakdown

		Weighted (n)	Unweighted (n)
Water and Sewerage Company regions	Anglian Water	215	220
	Dwr Cymru (Welsh Water)	112	100
	Northumbrian Water	98	101
	Severn Trent Water	333	326
	South West Water	59	57
	Southern Water	173	171
	Thames Water	499	511
	United Utilities	256	258
	Wessex Water	107	108
	Yorkshire Water	176	177

