



SPA
Future
Thinking[•]

Expectations of The Consumer Council for Water

Report of Qualitative Research



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1. Executive Summary

1.1. Objectives

1.1.1. In April 2012, CCWater commissioned SPA Future Thinking to undertake research to understand what water consumers think it should be doing and what its priorities should be over the next few years. After operating for almost seven years, CCWater is keen to ensure that:

- It is properly representing both domestic and business consumers of services provided by water sewerage companies
- Its Forward Work Programme and Operational Business Plan are fit for purpose

1.2. Approach

1.2.1. SPA Future Thinking conducted 20 bill-paying customer focus groups and a further 2 groups with non-bill paying young adults. The customer groups covered a broad spread of ages and social grades and a mix of metered and unmetered customers. Four of the 22 groups took place in Wales and the remaining 18 in different Water and Sewerage Company (WaSC) regions in England. In addition, six face-to-face depth interviews were conducted with vulnerable, disabled adults (three in Wales, three in England) and 20 telephone depth interviews were conducted with decision-makers in businesses of different sizes.

1.3. Findings

1.3.1. There was minimal awareness among domestic and business customers of CCWater as a consumer organisation which represents their interests.

- 1.3.2. When asked what CCWater's priorities should be, focus groups mentioned spontaneously areas that already form CCWater's current priorities, and also talked about consumer education, strategic planning and sustainability. So moving forward, the areas they hope CCWater will focus on are:
- Education
 - Strategic planning and sustainability
 - Water on Tap (water quality/availability and addressing leaks)
 - Speaking up for water consumers
 - A sewerage system that works
 - Value for money
 - Good service from water companies (CCWater's 'Right First Time')
- 1.3.3. Consumers suggested three core strands of information provision to help educate them:
- Explaining water industry structure and role of CCWater
 - Educating consumers in water usage and conservation
 - Ensuring that consumers are aware of service and tariff options and roles (for example, excepting areas where universal metering programmes are underway, that meters can be trialled for 12 months and customers have the option to go back to a charge based on their property within that time if they wish).
- 1.3.4. When made aware of CCWater's limited budget, people recognise that CCWater will be limited to low cost communications, maintaining an effective website and working closely with water companies and possibly other bodies such as councils to raise their profile and get their message across.
- 1.3.5. Despite many references to sustainability issues in the research, especially among better-informed participants, there is no consistent consumer or business viewpoint in this area. While some feel helping to ensure the long-term security of our water supplies should be CCWater's main priority, most want CCWater to concentrate on what are seen as more pressing issues regarding pricing or customer service.
- 1.3.6. There is wider support for CCWater to encourage research, development and innovation by water companies and, possibly, Defra to help find ways of ensuring a secure long-term supply of water.

- 1.3.7. Most consumers believe it is still vital for CCWater to have water quality and supply as a priority on their behalf;
- although many were looking at maintenance of existing standards rather than improvement
- 1.3.8. People want CCWater to:
- monitor what is being put into the water (with people wanting CCWater to play a role in this area, even when informed about the role of the Drinking Water Inspectorate), reflecting concerns about levels of fluoride in water, for example
 - work with water companies to ensure water quality is of a high and safe standard
 - make sure there is fair distribution of water and sewerage services across the country.
- 1.3.9. People want CCWater to put greater pressure on water companies to deal with leakage or encourage Ofwat to do so.
- 1.3.10. While consumers want CCWater to represent their interests and be a voice for water consumers some feel that currently they know too little about water related issues to hold coherent views that CCWater could express on their behalf.
- 1.3.11. So, some place more emphasis on CCWater raising its profile and being a voice TO consumers rather than being a voice FOR consumers.
- 1.3.12. Although issues around sewerage were less salient than some other topics in focus groups, and depths, participants agreed that CCWater should continue to take action in this area.

- 1.3.13. They want CCWater to:
- ensure that the sewerage system is sound
 - liaise with water companies to ensure they are adequately resourced to respond quickly and effectively to sewer flooding
 - provide information on what should and should not be put into the drains
 - support consumers in unresolved disputes with water and sewerage service suppliers.
- 1.3.14. There is universal agreement that CCWater should consider value for money and cost issues. For some, typically those with modest bills, this is seen as a low priority. But this is a major priority in areas with high water charges and among household and business customers who regard their water expenditure as significant.
- 1.3.15. So consumers want CCWater to:
- monitor bill levels and consult with Government, Ofwat and water companies
 - help consumers understand where their money is going and how and why charges differ across regions
 - provide clear, balanced information on water metering (but opinions are split on whether CCWater should be encouraging compulsory metering)
 - continue to press water companies to promote assistance available to customers especially vulnerable customers, struggling to pay bills
 - seek to help consumers in general; there was no desire on the part of research participants for CCWater to focus exclusively on 'vulnerable' customers
- 1.3.16. Consumers are pleased to know that CCWater will intervene in disputes between customers and their water companies.
- 1.3.17. One respondent likened this to a very cheap insurance policy and was pleased to know it existed even if the chances of needing to use it are small.
- 1.3.18. A respondent with experience of CCWater intervening successfully in a dispute with his water company was hugely relieved this option existed.

- 1.3.19. Therefore, consumers are keen to see CCWater maintain its complaints resolution service and hope that with greater publicity, more consumers will take advantage of the service.
- 1.3.20. Research respondents initially gave their views without being aware of what CCWater's current priorities – which were established some seven years ago – are. Whilst the economic situation of this country, and concerns about sustainability, has changed over the last seven years, the research largely endorses CCWater's existing priorities. There is no concerted demand for increased focus on financial issues. And while some want sustainability issues to form part of CCWater's focus or even its main focus, many remain sceptical as to whether it should seek to play a major role in this area.

Main Report

2. Background and Objectives

2.1. Background

2.1.1. CCWater was established in 2005 as the independent statutory body representing the interests of consumers of the water industry in England and Wales.

2.1.2. Prior to its inception, research was conducted to identify, direct from the consumers, priorities for their water and sewerage services and what they thought CCWater should do on their behalf.

2.1.3. This initial consumer expectations research has continued to shape CCWater's Operational Business Plans and Forward Work Plans.

2.1.4. From the initial 2004/2005 research, CCWater developed five core priority areas:-

- Value for Money
- Right First Time
- Water on Tap
- A Sewerage System that Works
- Speaking Up for Water Consumers

2.1.5. Within each of these areas, CCWater has remained conscious of consumer opinion on how they should achieve these and operate on their behalf. Research identified CCWater should:-

- Develop an authoritative and professional **image**;
- Establish a high national and regional **media profile**;
- Actively pursue **complaint investigations**;
- Ensure high levels of **information provision**;
- Enter into dialogue with appropriate stakeholders and widen its **outreach**;
- Ensure **customer involvement** is achieved at a regional/local level;
- Conduct **research** with customers to ensure provision of a robust evidence base;

- Conduct pro-active **lobbying** to campaign for customers' rights;
- Ensure a professional and business like **relationship with water companies**; and
- Ensure easy **accessibility to consumers**.

2.1.6. In 2012, CCWater recognised that with developments in the water industry and changes in the wider economic climate, consumer views and expectations of the service provided by CCWater may have changed.

2.1.7. Therefore, CCWater commissioned SPA Future Thinking to carry out research with household and business customers to determine if CCWater's policies and strategies are still in line with what consumers expect from their consumer representative.

2.2. Objectives

2.2.1. This fresh examination of consumer expectations was designed to achieve the following objectives:-

2.2.2. The business objectives were:

- To ensure that CCWater is properly representing both domestic and business consumers of services provided by water and sewerage companies.
- To confirm that the Forward Work Programme and Operational Business Plan are fit for purpose.

2.2.3. Research Objectives were:

- To identify concerns regarding water and sewerage services
- To establish ways in which consumers want CCWater to assist them and how they should achieve this
- To understand awareness of issues such as 'sustainable development' and 'green' issues in the water industry
- To explore how to protect the interests of vulnerable consumers
- To gauge the extent to which CCWater is expected to raise its profile

3. Methodology

3.1. Overview

3.1.1. The research adopted a wholly qualitative methodology of:-

- 22 focus groups with the general public
- 6 face-to-face depth interviews with vulnerable consumers
- 20 telephone depth interviews with business consumers

3.1.2. Research was undertaken between 30 April and 15 June 2012.

Each focus group and depth interview was guided by a researcher using a discussion guide, developed in close collaboration between SPA Future Thinking and CCWater.

3.2. General Public

3.2.1. Research was split into two phases:-

- Phase 1 consisted of 12 focus groups across six Water and Sewerage Company (WaSC) regions. It allowed consumers the freedom to raise and discuss any areas which they felt should be a priority for CCWater (the Phase 1 discussion guide is included in Appendices).
- Interim analysis of findings then identified where a majority of participants had raised a subject area as a priority for CCWater.
- Phase 2 consisted of 10 groups (across five WASCs¹) and explored priorities identified as important in the first phase. Further investigation was made into how consumers felt these priorities/objectives should be addressed and achieved by CCWater. The Phase 2 discussion guide is included in the Appendices.

3.2.2. The profile of the 22 groups is summarised overleaf. Groups were mixed gender and recruited on the basis of age and social grade, whether metered or not and whether had internet access. Groups of younger bill payers were also sub-divided between those with and without children. There were two groups of non-bill payers recruited on the basis they will be the customers of the future.

¹ Focus groups were conducted in Wales for Phase 1 and 2 to ensure broad and focussed discussion of all aspects with residents in Wales.

Table 3.1: Breakdown of general public focus groups

	Age	Social Grade	Metered	Internet	Other
PHASE 1					
Severn Trent : Sutton Coldfield	25-39	ABC1	All non-metered	Internet Access	Children at home
Severn Trent : Sutton Coldfield	55-74	C2D	All metered	Half Access	
South West: Bovey Tracey, Devon	75+	ABC1	All metered	Half Access	
South West: Bovey Tracey, Devon	25-39	C2D	Mix	Half Access	Children at home
Yorkshire: Leeds	40-54	ABC1	All metered	Internet Access	No children at home
Yorkshire: Leeds	16-24	C2DE		Internet Access	Non-bill payer
Anglian: Hardwick, Cambridgeshire	25-65	E	Mix	Half Access	
Anglian: Hardwick, Cambridgeshire	55-74	ABC1	Mix	Internet Access	
Thames: Bushey, Hertfordshire	25-39	BC1	Mix	Internet Access	No children at home
Thames: Bushey, Hertfordshire	40-54	C2D	All non-metered	Half Access	Children at home
Wales: Cardiff	40-54	ABC1	All metered	Internet Access	
Wales: Cardiff	25-39	E	Mix	Half Access	Children at home
PHASE 2					
Southern: Southampton	55-74	C2D	Half Metered	Half Access	
Southern: Southampton	25-39	ABC1	Half Metered	Internet Access	Children at home
Wessex: Poole	55-74	ABC1	Metered	Internet Access	
Wessex: Poole	25-39	C2D	Half Metered	Half Access	No children
Northumbrian: Hexham, Northumberland	16-24	ABC1		Internet Access	Non-bill payer
Northumbrian: Hexham, Northumberland	40-54	C2D	Non-metered	Internet Access	Children at home
United Utilities: Stockport	75+	C2DE	Half Metered	No Access	
United Utilities: Stockport	40-54	ABC1	Half Metered	Internet Access	Children at home
Wales: Wrexham	55-74	ABC1	Half Metered	Half Access	
Wales: Wrexham	35-54	C2D	Non-metered	Internet Access	Half children at home

3.3. Vulnerable Groups

3.3.1. Similarly to the general public, research with vulnerable groups was split into two phases (and used the general public discussion guide):-

- Phase 1 consisted of three depth interviews and allowed free discussion of any areas which they considered should be a priority for CCWater.
- Phase 2 consisted of a further three depth interviews and focussed on and explored priorities identified as important in the first phase of groups and depth interviews. Further investigation was made into how consumers feel these priorities/objectives should be addressed and achieved by CCWater.

Table 3.2: Breakdown of vulnerable (disabled) consumer depth interviews

	Age	Metered	Vulnerable criteria	Gender
PHASE 1				
Cardiff	25-39	Yes	Limited sight and learning difficulties	Female
Cardiff	40-54	No	Mobility and heart problems (on long term sick leave)	Female
Cardiff	60+	No	Mobility issues and skin problems	Male
PHASE 2				
Hexham	25-39	No	Limited mobility due to back problems	Female
Hexham	25-39	No	Skin problems	Male
Hexham	70+	No	Heart and back problems	Female

3.4. Businesses

3.4.1. Research with business consumers was conducted across the two phases with most interviews conducted in the second phase. Interviews were spread across England and Wales and comprised of businesses of a range of different sizes (see 3.3 overleaf).

3.4.2. The business discussion guide is included in the Appendices.

Table 3.3: Breakdown of business depth interviews

	Region	Number of Employees	Industry	Position
Interview 1	Wales	1	Hairdresser	Owner
Interview 2	Northern	2-5	Accommodation/ Food/Hospitality	Manager
Interview 3	Northern	2-5	Hairdresser	Owner
Interview 4	Wales	2-5	Construction	Director
Interview 5	London & South East	2-5	Hairdresser	Owner
Interview 6	Wales	2-5	Accommodation/ Food/Hospitality	Manager
Interview 7	Central & Eastern	6-10	Post Office	Manager
Interview 8	London & South East	6-10	Printing	Owner
Interview 9	Wales	11-20	Golf Club	Manager
Interview 10	London & South East	11-20	Accommodation/ Food/Hospitality	Manager
Interview 11	South West	11-20	Accommodation/ Food/Hospitality	Manager
Interview 12	Central & Eastern	21-50	Charity	Office Manager
Interview 13	London & South East	21-50	Retail	Manager
Interview 14	South West	51-100	Accommodation/ Food/Hospitality	Facilities Manager
Interview 15	London & South East	101-250	Retail	Manager
Interview 16	London & South East	101-250	Non-profit charitable/Civic or social organisations	Property Manager
Interview 17	Northern	101-250	Manufacture	Manager
Interview 18	London & South East	251+	Mining and Quarrying	Manager
Interview 19	Northern	251+	Retail	Branch Manager
Interview 20	London & South East	251+	Retail	Sustainability Manager

3.5. Definitions, Presentation and Interpretation of the Data

- 3.5.1. Qualitative research is ideal for exploring complex issues and to elicit a full range of possible answers. It allows insight into peoples' attitudes and beliefs, which could not be examined in as much depth using a structured quantitative questionnaire.
- 3.5.2. However, it must be remembered that qualitative research is designed to be illustrative and does not look to produce statistics, but to identify the range of views within a particular group. In addition, it is important to bear in mind that we are dealing with perceptions rather than facts. This needs to be taken into account when interpreting the views of all individuals in this study.

3.6. Verbatims

- 3.6.1. Throughout the report we have made use of verbatim comments to illustrate a particular viewpoint. It is important to be aware that these views do not necessarily represent the views of all individuals.
- 3.6.2. Where quotes have been used, while retaining the anonymity of the participant, we have provided a reference to their key demographic characteristics.

4. Understanding the context

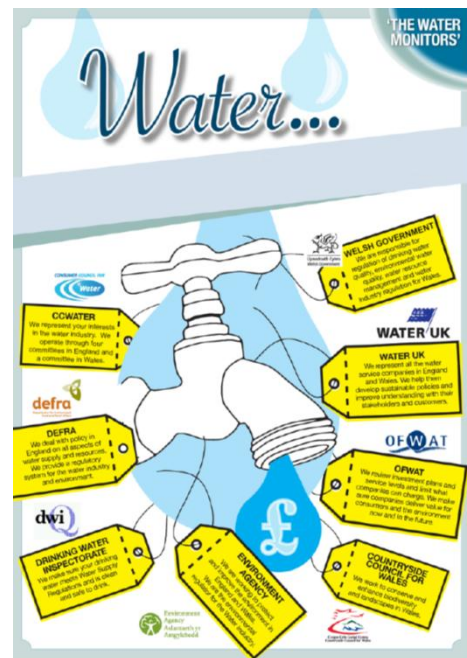
4.1. Introduction

4.1.1. Awareness of CCWater was minimal across domestic and business consumers. Among the few who had heard of the organisation, some confused it with Ofwat.

4.1.2. On further explanation, most were pleased to know that an organisation exists to protect their interests in the water industry and were particularly satisfied with the 21p annual charge.

4.1.3. To enable participants to consider what CCWater should be doing on behalf of consumers, background information was presented to give some context to the discussions.

4.1.4. Research moderators explained to participants how many water and sewerage and water only companies exist. Focus group and face-to-face depth interviewees were also shown maps of water company areas as part of the discussions. An illustrated overview of vested parties was also distributed to participants (as shown on the right). This was also emailed to most of the business respondents and the key elements were read out to those not emailed the document.



4.1.5. The brief insight into the industry stimulated discussion and allowed participants to give more considered opinions on what their core concerns may be and their expectations for CCWater.

4.1.6. Throughout the discussions other material was also used to aid and inform participants about core areas, to enable a more considered opinion to emerge.

4.2. Priority Areas

4.2.1. The research was designed to allow participants in Phase 1 to have free range to identify areas which CCWater should focus on. By encouraging respondents to come up with their own ideas (even if these were uninformed ideas), we reduced the risk that they would simply endorse CCWater's existing priorities.

4.2.2. From the initial phase of 12 focus groups, there were regular demands for CCWater to focus on:-

- Education
- Strategic Planning and Sustainability
- Water on Tap
- Speaking up for Water Consumers
- A Sewerage System that Works
- Value for Money
- Good service from water companies (CCWater's 'Right First Time')

4.2.3. These seven priority areas were explored further within Phase 2 of the research and within the business depths to confirm they were significant and to understand how consumers think CCWater should deal with each.

4.2.4. The following chapters take each of the priorities in turn exploring:-

- why it is deemed a priority by consumers
- what type of action consumers think CCWater should take
- and whether the research concludes that it should be a future focus for CCWater

5. Education

5.1. Why is it a Priority?

- 5.1.1. Although the 2004/2005 research found that CCWater should 'ensure high levels of information provision' respondents in this study were unaware of any education about the water industry or water and sewerage services being delivered directly by CCWater.
- 5.1.2. Across the research, both domestic and business consumers frequently appealed for CCWater to play a greater role in being a voice TO the consumer as well as FOR the consumer. To some extent, this demand for CCWater to educate the public arose because respondents struggled to answer many questions about what they thought CCWater's stance should be on subjects such as pricing and leakage. Asked what they thought CCWater should be doing many respondents suggested they should be creating a better-informed population of water users.
- 5.1.3. Some participants were of the opinion that while CCWater is likely to have the industry knowledge and expertise to represent them, if they want to take on board consumer opinion, consumers cannot be expected to relay or even hold opinions, if they do not know or understand the sector

"It seems like all what we have said, it all comes back to awareness doesn't it and education and I think we have tried to answer [what is important to us] and we struggled a bit with answering because we are just not aware of it."

(Male, Sutton Coldfield, 25-39, ABC1)

- 5.1.4. Across the discussions, three strands of education about water and sewerage services are identified as being important to consumers:-
 - Industry knowledge
 - Practical information
 - Eligibility information

5.2. Industry Knowledge

- 5.2.1. In the context of their everyday lives many consumers and businesses simply take water for granted, giving little consideration as to why the water comes out of their tap when they turn it on, and still less to the structure of the water industry. But to provide an informed view of what CCWater should be doing understanding how the industry works was important to consumers. And at the end of some of the sessions respondents commented that they had learnt more about the water industry and the issues it faces in a 90 minute session than in the rest of their lives to date.
- 5.2.2. Many (perhaps around half of all research participants) claimed to have heard of Ofwat but few (none in some groups, one or two in others), claimed awareness of CCWater or the Drinking Water Inspectorate. On showing them the illustration of the water industry structure, many admitted to being unaware of CCWater, Ofwat and the Drinking Water Inspectorate. They might have heard of Defra and the Environment Agency but had not been aware of the roles they played within the water services sector.
- 5.2.3. Interestingly, one otherwise very well-informed man in a Poole group, who had worked with several water companies in an earlier job, had not been aware of CCWater, nor had the well-informed Sustainability Manager of a large retailer, so even some people with a good knowledge of the industry are not necessarily aware of CCWater.
- 5.2.4. Greater knowledge of the roles played by CCWater and the other organisations would be useful in helping people understand the industry as a whole. Many respondents in our study found it reassuring to know each of these organisations has a specific role to play in making sure the industry is operating well. But some, either in comments made directly to moderators/the full group, or in overheard mutters to their neighbours, questioned whether it was necessary or helpful to have so many different bodies with responsibilities. Some wondered if there was a need for more than one regulator and for consumer bodies to exist alongside different regulators.
- 5.2.5. Many focus group respondents, especially in the first phase of research, said they wanted to understand more about the water industry and how it operated. But we need to consider the context in which these comments were made. Getting respondents to talk about the water industry highlighted their lack of knowledge and encouraged them to say they would like these holes in their knowledge to be filled but some respondents had hitherto shown little inclination to read or seek out material related to their water supply.

- 5.2.6. Nevertheless, there were repeated demands in focus groups and business depths for CCWater to raise its profile. When told that CCWater's contact details appeared on bills (usually the back) some called on water companies to give greater prominence to CCWater's function and contact details on their bills so this would be seen by someone glancing at their bill rather than reading it word for word.
- 5.2.7. Understanding what CCWater does was considered important with calls for greater visibility and dialogue between CCWater and consumers (this is covered in greater detail within the Speaking Up for Water Consumers section).

"I think at the end of the day they are Consumer Council for Water, we are the consumers...they need to have a good connection with the people that are using water to get an idea of what we think is going wrong, what's going right, what they need to improve on, on a regular basis and making them more aware, like nobody knew who they were before we came here."

(Female, Leeds, 16-24, C2DE)

5.3. Practical Information

- 5.3.1. Many felt it was important for CCWater to educate consumers on how to conserve water to protect supply. Some felt that providing tips on how to save water or what can and cannot be disposed of into the system could make a big difference on a national or regional scale.
- 5.3.2. While consumers may receive information from their water and sewerage service provider on a range of issues, it was felt this was often ignored, especially if received with the bill, or that it was too technical if covering complex information.
- 5.3.3. An illustration of how easily consumers ignore and forget about material from their water company was illustrated in the older Poole group where the one participant who received their water from Sembcorp Bournemouth Water brought along some helpful literature they had provided. The Wessex Water customers bemoaned the fact their company never sent them anything like that. In fact at least two Wessex customers had received water bills only that week and the moderator had received a lot of information from Wessex Water about water supply, reducing usage etc. in his bill (suggesting the respondents would also have received this) as well as a separate mailing three weeks later. The conclusion drawn is that a lot of material sent by water companies is not read and/or is quickly forgotten.

- 5.3.4. Material can also be misunderstood. For example, although many recalled receiving information regarding the recent changes in private sewer ownership, some had become more confused about the issue and were under the impression they were taking on more, rather than less, responsibility as householders. (Several participants in Hertfordshire had received mailings from Veolia Central that resulted in them thinking their own responsibilities had just increased). It was felt this was an opportunity where CCWater could have had more direct contact with consumers to inform them impartially about the changes in a clear way.
- 5.3.5. Domestic consumers were in agreement that while conserving water may be common sense, many households will be using (and most likely wasting) water on activities where there could be alternatives. Many cited the use of water butts rather than hose pipes, turning taps off while brushing teeth and having showers rather than a bath. However many suggested that there was probably more they could be doing if they knew the impact they could have on usage.
- “Maybe how many times you take a shower a day or if you have a bath or a shower, is a bath going to cost more than a shower. I don’t actually know”
(Male, Hexham, 16-24, ABC1)*
- 5.3.6. Business consumers are less likely to view education as a priority for CCWater. Many stated that through trade organisations/ Health and Safety Executive information, internal experts and general experience they believed themselves to be fully aware of best practice in terms of their use of water and disposal procedures.
- 5.3.7. However, some believed smaller and newer businesses may benefit from advice and guidance about water services.

5.4. Eligibility Information

- 5.4.1. Providing advice and education about the various options available to consumers was seen as an important consumer entitlement. Two core areas of information were cited as potentially being very valuable:-
- greater impartial advice on metering and the procedures behind it
 - available assistance for people in debt or struggling with their bills

- 5.4.2. Many domestic consumers who were not currently on water meters claimed part of the reason was the uncertainty of whether their bills would go up or down. There was minimal awareness that (unless they were in an area subject to universal metering) customers can usually return to un-metered billing within the first year if they change their mind. Learning about this option, led to some considering the meter option more seriously. For example, a Wrexham man said he had been reluctant to have a water meter installed because, although he thought he might save money, he was also concerned he might end up paying a lot more on his bills. Knowing he could revert to an unmetered charge, if a metered charge resulted in him paying a lot more, would remove that fear.
- 5.4.3. A minority of participants expect or want CCWater to encourage the wider installation of water meters and a few want CCWater to support compulsory metering. However, there are no general expectations on CCWater to present water meters in either a positive or negative light but rather to ensure that neutral information about the advantages, disadvantages and general process is widely known to enable consumers to make an informed decision.

“I am sure that might be a conversation that my Dad has had and we decided to think about getting it [a water meter] but then not wanting to do it because you can’t change back if it is that more expensive or whatever.”
 (Male, Leeds, 16-24, C2DE)

- 5.4.4. Apart from those already on the WaterSure or Welsh Water Assist schemes, awareness of alternative tariffs was low. Even consumers who seemingly met the criteria and were struggling financially, were unaware that assistance may be available to them.

“I don’t know about this [Water Sure], it should be automatic that you’re told about it.”
 (Female, Rural Cambridgeshire, 25-65, E)

- 5.4.5. In Cardiff, an elderly couple who were struggling to pay bills were told they might be eligible for help. But when they rang Welsh Water in 2011 they were informed that they were too late for that year and to ring again in 2012.
- 5.4.6. It was not deemed sufficient for consumers to be able to pro-actively pursue such options if they exist. Respondents felt there should be greater advertising and education about such help.
- 5.4.7. Many consumers admitted they do not read additional information contained with, or on the reverse of, their bills and with the majority not aware of CCWater, information through its website has not been accessed. Consumers therefore called for more direct marketing of such assistance.

- 5.4.8. The eligibility criteria for WaterSure was also questioned by those struggling financially but with only two children, as to why a parent needed three children before they could claim. But challenging the eligibility criteria for WaterSure is certainly not considered a priority of CCWater.
- 5.4.9. Overall, education emerged as a distinct priority in its own right while also being a common thread through many of the other areas of focus.

5.5. What Action do Consumers Want CCWater to Take?

- 5.5.1. Some consumers felt that water companies could provide more education on many aspects, and one group (older customers in Southampton) said they would be more inclined to read material from their own water company than an independent organisation. But overall, the provision of information to consumers was seen as potentially a valuable function, even a key responsibility, of CCWater, as an independent and unbiased representative of water consumers.
- 5.5.2. Many feel that if water companies provide information on water conservation for example, consumers are likely to be suspicious of ulterior motives of wanting to cut costs; whereas CCWater would be viewed as more trustworthy with no hidden agenda.

“A water company could tell us anything and we can either say okay I don’t understand it, or from my own point of view I don’t trust them because at the end of the day they are trying to sell you a product whereas if you have got someone in the middle you are going to get something really balanced.”

(Male, Leeds, 16-24, C2DE)

- 5.5.3. Participants were asked to think of ways in which CCWater could increase its focus on education while efficiently managing a budget.
- 5.5.4. Consumers were very thoughtful about possible information dissemination and practical in many of their suggestions. While some older participants claimed they would be likely to read unsolicited leaflets received through the door, most said they would be unlikely to take notice of such information, especially on a subject not likely to be top of mind.

“You don’t look at any leaflets ...I think leaflets are a waste of money at the moment nobody wants them.”

(Female, Sutton Coldfield, 25-39, ABC1)

- 5.5.5. There were a range of consistent and well received recommendations of ways to get key messages across. These included maintaining a customer-friendly, customer-focused up-to-date website which came up quickly in response to key word internet searches and to which water companies and councils directed their customers.
- 5.5.6. **Using formal education routes** – there were frequent suggestions that informing and educating children will lead to a natural improvement in knowledge among consumers. Participants suggested CCWater form close alliances with the Department for Education at a national level and schools, colleges etc. at a local level to establish what messages can be included as part of the national curriculum.
- 5.5.7. **Using Social Media** - although likely to only reach certain groups of the population, as a growing channel, it was seen as a quick and cost effective way of delivering easy to digest information. A business depth interviewee, who worked for a long-established charity helping people in difficult circumstances make informed decisions, said her organisation was increasingly using social media such as Facebook and Twitter and felt these were effective ways of reaching people, especially potentially vulnerable adults. Consumers are clear that if Social Media were to be used, information must be eye-catching and concise focussing on issues likely to capture attention. They suggested topics such as:-
- “You could save “£” a year by turning off your tap while brushing your teeth”*
- “Trial a water meter for a year and see if you save money on your water bill”*
- 5.5.8. Such references to water saving/money saving measures by CCWater on sites such as Twitter or Facebook may well encourage comments and response from consumers who have tried such actions and lead to wider discussion.
- 5.5.9. **Education through incentives** – many water companies already offer consumers opportunities to receive discounted or free water saving items such as eco flushes, shower regulators and water butts.
- 5.5.10. However participants argue that CCWater could collaborate more with water companies to promote the use of such facilities and motivate interest such as competitions to receive a free water butt if you are one of the first 100 consumers to apply etc. This would also serve to advertise CCWater more widely.
- 5.5.11. **Traditional advertising through national and local newspapers** – across all age groups, newspapers were viewed as a source likely to reach a significant amount of consumers. CCWater was viewed as either being able to produce a media campaign independently or in alliance with water companies to inform consumers more about the industry as a whole and ways in which change can be implemented.

- 5.5.12. **Infiltrating popular media** – some participants believe there is scope for CCWater to work with programme makers (particularly TV but also radio) to explore options for current issues in the water industry to be incorporated into children’s or popular programmes. Seeing characters on programmes such as Coronation Street using water butts or discussing water conservation is felt likely to educate customers and encourage good practice. Having children’s TV characters saving water is thought to be a good way of instilling good behaviour in children.
- 5.5.13. **Bringing pressure on water companies** – better promotion of assistance schemes is seen as vital and there is a concern that current information is hidden and not obvious to consumers. CCWater is seen as having a role in pressurising water companies to look at ways in which they can provide clearer education to consumers on help that may be available to them.
- 5.5.14. **Encouraging manufacturers to think about water consumption and communicate with customers** – a disabled Hexham woman argued that CCWater should liaise, for example, with manufacturers to encourage them to provide better information for consumers:
- Hot tub manufacturers should make it easier for consumers to understand what they can do with waste from pools/tubs which may have chemicals
 - Formula milk manufacturers say on the tin to run under the cold taps until cold which she felt was unnecessarily wasteful

5.6. Should Education be a Focus for CCWater?

- 5.6.1. There were repeated references to education throughout the research, especially in the first phase groups, and consumers claimed considerable appetite for more education on a range of factors. Some business interviewees and focus group respondents, especially in the later stages of research, admitted that they would be disinclined to read material about their water supply or saving water but they were in a minority across the full programme.
- 5.6.2. Once aware of the role of CCWater, consumers feel it should be a provider of balanced reassurance and a trustworthy voice on the various aspects of the water industry.

- 5.6.3. There is a risk that it is easy for participants to claim a desire for information while in reality unlikely to take notice of it. However, in a time of economic uncertainty and ever-expanding communication sources, consumers can easily become confused or misled by information they are exposed to. Having a reliable and consumer focussed source of education would help to not only reassure but also clarify the true position on particular areas. CCWater's voice is felt likely to be balanced, informed and authoritative without being designed to protect vested interests.
- 5.6.4. It is important for CCWater to monitor their resources and consider the best options for increasing the focus on education to consumers. Many of the options suggested by participants in the research are already in place to some extent, so could be expanded or piloted with relatively low financial impact or risk.
- 5.6.5. For example, issuing messages on social media sites and monitoring response, increase in awareness etc. could be tested with minimal resources.
- 5.6.6. **Research Conclusion: Education should be a priority, as there is a general consensus that consumers would benefit from greater information from CCWater**

6. Strategic Planning and Sustainability

6.1. Why is it a Priority?

- 6.1.1. Sustainability was explored as a priority because it was consistently raised by participants throughout the Phase 1 research as a growing concern.
- 6.1.2. A minority requested that CCWater prioritise sustainability to improve the environmental impact of water usage; but the majority raising the issue did so out of concern regarding the supply that will be available to consumers in the future.
- 6.1.3. Consumers did not think enough action was being undertaken to plan for the future. Again tying in with the education theme, many claimed that there was no information shared with the general public about what options are being explored to safeguard future water supply or what action is in place to ensure water shortages are not repeated.
- 6.1.4. With inclement weather throughout much of the research process, participants were perhaps more inclined to question the harnessing of natural water sources such as intense rainfall, with many citing examples of blocked drains and flooded land where water is likely to go to waste rather than back into the system.

“If this was a dry winter what’s it going to be like in 10 years time you know, are we going to be living like the Sahara desert, they need to be working towards getting water from somewhere or preserving it somehow.”

(Male, Sutton Coldfield, 25-39, ABC1)

“So certainly they get an adequate amount of water, it’s just trying to harness that water that’s all. It’s a case of investing and, strangely enough in this country, they tend not to invest in the right areas and sometimes they’re putting money into all the wrong areas.”

(Male, Hexham, 40-54, C2D)

- 6.1.5. Concern also arose around recent closure of some reservoirs with numerous respondents wanting more reservoirs to be built. A well-informed business respondent argued that water companies existed primarily to provide good returns for their (typically French and German) shareholders. This meant selling off reservoirs for housing made sense financially whereas from the viewpoint of long-term sustainability it made no sense at all.

- 6.1.6. While a minority are against the idea of building more reservoirs due to the disruption caused, many are in favour, viewing them as a valuable water supply and option for local conservation and leisure. If building another reservoir were not a viable option, consumers would like to know why, rather than becoming suspicious of reasons behind such decisions.
- 6.1.7. While it was common for participants to recall media references to water shortages, limited supply and leakages, few could cite evidence of information on mitigating action or planning, which they would find reassuring.

“They’re making big news there’s going to be a shortage of water or maybe a drought in the future, but you never actually hear what sort of solutions they’re doing, like are they building any more reservoirs, you don’t really hear concrete plans of what they’re doing.”

(Male, Stockport, 40-54, ABC1)

- 6.1.8. For some, sustainability at an England and Wales level is not thought to be a major issue, even in the future, provided water could be directed from areas that received a lot of rainfall (such as north Wales and north west England) to areas with a high demand for water, such as south east England. Some recognise that a full national grid for water would be a very expensive option but think the Government should at least be taking steps to ensure more efficient distribution of water. A business respondent whose son lived in California reported that despite low rainfall in California, Californians used a lot of water because their water companies had been diligent in sourcing supplies from other states. He bemoaned the failures of successive British governments to make sure the same arrangements were in place in England.
- 6.1.9. Consumers raising sustainability as a concern believe it is important that CCWater keeps on top of the issue and puts pressure on the industry to protect the interests of water consumers into the future.

6.2. What action do Consumers Want CCWater to Take?

- 6.2.1. It was assumed that CCWater would not be able to take action itself in initiating sustainability plans. Some respondents questioned whether CCWater would be able to play any practical or worthwhile role in relation to sustainability but it was generally felt that it could play an important role in championing consumers desire for either greater planning and action or, if already in place, greater promotion of strategic planning by the Government, Ofwat and/or water companies.
- 6.2.2. A number of potential actions were suggested for CCWater to respond to this consumer demand.
- 6.2.3. **Pressure Government/water companies to undertake greater research/development** – there were suggestions that natural water sources need to be exploited further and some called for CCWater to liaise with responsible parties to understand what research is being undertaken or planned. Some respondents are particularly incensed that opportunities to increase the supply of water by gathering or harnessing naturally available water are not being taken. A Wrexham woman bemoaned the fact water from a long-established spring was not being captured but simply allowed to spout out on to roads and paths while a Devon woman felt more efforts should be made to ensure heavy rainfall was collected.

“We’re not getting as much rain. We’re definitely in a drier spell whether it’s global warming or whether it’s just incidental, we don’t know. But if underground water supplies run out, we’ve got real problems...when rivers are in flood, why are we not collecting some of this water?”

(Female, Devon, 70+, ABC1)

- 6.2.4. Participants cited processes they were aware of such as desalination which was frequently mentioned especially given the stretches of coastline in England and Wales.
- 6.2.5. One business interviewee (representing a quarry) queried why the industry does not research business water sources. He stated that the lakes they privately use maintain a surplus which could be extracted to wherever necessary when there is a shortage in the local area or reservoir.

“Although there is a drought on, reservoirs were low but our lakes were full and surely it could have been transferred.”

(Business Interviewee, Quarry, London/South East, 251+ employees)

6.2.6. **Explore successful developments abroad** – countries such as Australia, New Zealand, South Africa and the Middle East were commonly cited as adopting innovative ways of utilising their water supply from examples of desalination to piping it through deserts.

6.2.7. CCWater was seen by some as potentially able to explore and research the feasibility and success of foreign methods and provide informed evidence to the Government to stimulate debate on the matter. Others thought that if it did not have the resources itself to achieve this, then it should be pressing the water companies or Defra to make sure this knowledge was captured and used for the future benefit of British citizens.

“Perhaps they take their leads from other countries. I’ve been to Malta and most of their water comes from the sea, they’ve had that for years. It’s just an island and most of the water there is salted but that’s how they do it.”
 (Male, Hexham, 40-54, C2D)

“In Australia they are using sea water aren’t they? They’ve got the same technology as nuclear subs but because they have been factoring in for the last 15 years or something like that, the government afford it, we can’t afford it, apparently the government won’t pay for it.”
 (Male, Bushey, 25-39, ABC1)

6.2.8. **Consultation with developers** – with the increasing housing need being addressed through new housing developments, working with developers was seen as an important step to future water sustainability. Some, especially individuals involved in the building trade, were aware that developers are now required to meet many new regulations regarding the sustainability and footprint of the properties they build.

6.2.9. Many felt that CCWater (if it was not already doing so) needs to build relationships with large and small building companies and developers to ensure that relatively straightforward water saving options are considered and ideally implemented in all newbuilds such as provision of water butts, sensor taps, dual flushes etc.

6.2.10. In addition, promotion of more complex planning and development would also make a considerable difference such as developments being built to use greywater/brownwater for particular functions such as toilet flushing. Even the older Wrexham group, where one respondent reported how brown water use on a new development had stained the toilets to such an extent they were now being replaced, supported the principle of encouraging such developments to be trialled.

“I think another very important thing we should be doing when treated water is so precious... we should be using rainwater off the roofs of our houses for

flushing toilets and watering gardens and washing cars. We should not be using treated water for things we don't need it for."

(Female, Devon, 70+, ABC1)

"I think some of the designers of the new houses can help as well....if you could have like they do in boats, you have a grey water system and a black water system and maybe some of your bath water can go into a main water butt alongside the house which is properly purposely built for that particular property."

(Male, Poole, 25-39, C2D)

- 6.2.11. A business depth interviewee suggested non-food manufacturers who need a lot of water in the manufacturing process do not need such high quality, pure water as those who planned to drink the water and she wondered whether water supply could be split according to the end user's needs.

6.3. Should Sustainability be a Focus for CCWater?

- 6.3.1. Those advocating prioritisation of sustainability, argued vigorously to support their view. Most consumers raising sustainability as an issue believed it to be one of the most important aspects which CCWater should be focussing on, over and above many of the other factors. The Sustainability Manager of a major retailer argued that businesses and consumers had made efforts to save energy but that water had been largely ignored. That situation, he argued, could not continue. He wanted a better-funded CCWater to promote strong sustainability messages and to advise businesses and consumers on how they could reduce their water consumption. Interestingly, he linked sustainability to value for money and pricing suggesting that if water usage was not reduced, water would become more scarce, and its price would rise.
- 6.3.2. However there are a number of consumers who are highly sceptical of stories of water shortage or likely restrictions in the future and therefore do not see the need for CCWater to concern itself with using resources in this area. A business interviewee from Manchester said people in the north west were bemused by suggestions of future water shortages and struggled to take such threats seriously.
- 6.3.3. This priority area was the only core subject area where there were extremes of opinion. Although a majority cited the need for focus on the issue, there were other consumers who did not want CCWater to deal with it at all.
- 6.3.4. Perhaps the acid test on the issue of sustainability is the extent to which people are willing to make financial or lifestyle sacrifices to meet sustainability objectives. Here, individuals differ greatly in their claimed willingness and ability to make sacrifices. Some say they would gladly pay more on their water bills if that money was to be invested to ensure the security of long-term supply and some are quite happy to contemplate restrictions on their water usage. Some, especially individuals in one or two person households, argue that water metering should be compulsory as it would make people more conscious of the water they use and reduce overall usage. But other high users are vigorously opposed to compulsory metering and in the two Southampton groups, those who use a lot of water used arguments based around freedom of choice to justify their annoyance at compulsory metering. Our research shows that many individuals, especially those under the age of 50, place more value on keeping bills low and/or on having an unlimited supply of water in the short term than on taking steps that may help to protect the long-term supply of water.

- 6.3.5. **Research Conclusion: Sustainability could become a priority but currently undertaking work in this area would not be representing all consumers, with some sceptical regarding the concept or unwilling to make the financial or lifestyle sacrifices that the concept might imply.**

7. Water on Tap

7.1. Why is it a Priority – Water Quality

7.1.1. Most consumers are satisfied with the quality of their water. In some areas, including Yorkshire, north west England, south west England and Wales respondents say they believe their water to be particularly ‘good’ or pleasant tasting. There is awareness of the high standard of water in England and Wales with particular references, by some, to the greater numbers drinking tap water compared to ten or twenty years ago. However, in both Cardiff and Wrexham some talked of water often appearing cloudy. A disabled Cardiff man boiled his water before drinking it as the cloudiness made him suspicious. A Wrexham woman reported that her daughter who lived locally had refused for a while to drink water from the tap because of its poor colour.

7.1.2. Despite perceived improvements to the standards of water, and some feeling that further improvements are either not really necessary or very hard to achieve, consumers are sure that CCWater still has a role to play in monitoring standards of water as they would not find a decline in quality acceptable. Some call for constant vigilance to ensure water companies continue to offer an appropriate service.

“The maintenance of the water, making sure it’s a constant flow and constant pressure, and cleanliness.”

(Female, Cardiff, 25-39, E)

7.1.3. Despite the majority claiming satisfaction with the water quality, some participants have concerns over the water received into the home. Key issues are:-

- hardness of water, especially in the Midlands and Southern England
- discolouration of water
- water pressure
- fluoridisation of water

“Mine smells of chlorine, I think it just depends which area you are in, because if I go to my mum’s, hers is fine, but mine just stinks of chlorine.”

(Female, Leeds, 16-24, C2DE)

“The biggest problem we’ve got is the hardness of the water in this area.”

(Male, Rural Cambridgeshire, 55-74, ABC1)

- 7.1.4. Many accept that differences in water are a result of areas having different natural supplies. There is not a significant expectation for CCWater to do anything about the hardness, colour or taste of water but if something could be done then it would be appreciated by householders affected. There is little support for water softeners being put into water supplies as this could restrict drinking water options.
- 7.1.5. In contrast, participants affected by issues of water pressure and in areas of fluoridisation are more vocal in urging CCWater to take action.
- 7.1.6. While extreme levels of water pressure are irritating for domestic consumers, some business consumers believe it has significant impact on their businesses. In one case, a pub regularly experiences changes in water pressure when reservoir source transfers and had suffered burst pipes and damage to property; while a hairdressers affected by low water pressure meant the business could only deal with a limited number of customers at any one time restricting the revenue it can take.

“When they switch supply over from one reservoir to another reservoir, it causes surges in pressure every time and last time all our pipes burst as a result which affected the business we could do for a while.”

(Business Interviewee, Accommodation/Food/Hospitality, Wales, 11-20 employees)

“If they could improve our water pressure it would make a huge difference to us as a business. It would mean we could get more efficient showers in, we could have 2 backwashes, we could do more clients, increase our revenue, it would have a full on effect...we have 2/3 staff but we can only wash one person’s hair at a time.”

(Business Interviewee, Hairdressers, Northern, 2-5 employees)

- 7.1.7. Some consumers, particularly in Sutton Coldfield sessions, are concerned about fluoride being added to their water supply while others are unsure whether it is a good or bad idea.

“Whether you are happy is subjective, what have you got to compare it against... you want to know what goodness is in it but I don’t know to be honest I don’t know how much fluoride is in my water and now you have both got me thinking about it, I brush my 10 month olds teeth with it each morning, should I be doing it or is it fine?”

(Male, Sutton Coldfield, 25-39, ABC1)

“It’s to do with the amount of toothpaste your children are putting on their toothbrush because of the amount of fluoride that’s in the water which is no good for their teeth.”

(Female, Sutton Coldfield, 25-39, ABC1)

- 7.1.8. There is some concern that there are too many organisations taking an interest in water quality. But most respondents feel it still makes sense for CCWater to focus on water quality with a much broader remit than the narrow safety concerns of the Drinking Water Inspectorate.

7.2. Why is it a Priority – Water Supply

- 7.2.1. The research was conducted at a time of official drought in many parts of England and Wales and hosepipe bans in some regions but ironically also during a period of heavy rainfall.
- 7.2.2. In light of the restrictions to usage, water supply was a hot topic across the sessions.
- 7.2.3. Some misconceptions relating to supply are evident among consumers with many firmly believing that hosepipe bans occur every year or that there is an infinite supply of water to be utilised.

“Well quite often if I remember rightly the last couple of years that we’ve had there’s going to be water shortages, there’s going to be hosepipe bans and things like this, and I’m certain that’s been the last couple of summers we’ve had that.”

(Female, Poole, 25-39, C2D)

- 7.2.4. Many consumers have an expectation that they will always be able to turn on their tap and water will come out and would be surprised for this to change. As such, they viewed a key role of CCWater as helping to make sure the industry always supplies continuous water.
- 7.2.5. In terms of sustainability some consumers had seen this issue more in terms of distributing water from areas with high rainfall to areas with less rainfall. With supply more pressured in certain areas of the country there was discussion around the fairness of distribution given how the industry is structured into core water and sewerage company regions. Some respondents talked about transferring water from one region to another, but there were concerns over the cost to a water company of buying in water.

“I know if I lived in that part of the country that couldn’t turn on the hosepipe ...you’d be rather annoyed so I think they need to be thinking about fair share with the water and the supply.”

(Female, Sutton Coldfield, 25-39, ABC1)

- 7.2.6. Overall, most had not experienced issues with their water supply. Among those in temporary restriction areas there was debate over the impact of hosepipe bans, and the difference it can realistically make to resources, with some in favour and some against.

- 7.2.7. Having confidence in a continuing supply is viewed as an important priority for CCWater and ties in with the request for greater education with a focus on providing tips to consumers on how they can help to save water.

“What are the government doing to kind of make sure that in future we are not going to have a hosepipe ban every summer and if that is the case, then educate people on how to save water and do it themselves before they bring in the hosepipe ban.”

(Female, Bushey, 25-39, ABC1)

7.3. Leakage

- 7.3.1. While consumers were receptive to the idea of taking action to save water to prolong and protect supply, some did question this responsibility when water companies seemingly waste huge volumes of water. Consumers need to know that their efforts are being matched by water companies and currently there is doubt that this is the case due to evidence (particularly in the media) of leaks being ignored.

“You hear about the amount of money that's being wasted by the companies. And part of you thinks well I will turn my tap off from time to time, and sometimes you think well nothing you're going to do is going to change it because money you're paying is getting wasted by companies.”

(Male, Stockport, 40-54, ABC1)

“Put pressure on water companies to fix the leaks. We're back to leaks again, aren't we.”

(Male, Hexham, 40-54, C2D)

- 7.3.2. The issue of leakages emerged (mostly spontaneously) in almost every discussion in the research. It was deemed unacceptable for water companies to allow leaks to go unfixed for long periods of time given the awareness that water is a precious resource.

“Would you imagine the gas board having 25% leaks.”

(Male, Devon, 70+, ABC1)

“If you filled your car and you were losing 30% of petrol, you'd begin to think wouldn't you.”

(Male, Wrexham, 55-74, ABC1)

- 7.3.3. During the discussion, participants were informed about the current system of leakage targets which each water company is expected to meet. For the majority the current process was inadequate and there was a shared belief that CCWater needs to represent their views by pressuring Ofwat and water companies to do more to deal with the volume of water wastage through leaks.
- 7.3.4. The cost of repairing leaks is an issue with consumers unwilling to bear the cost through higher bills as they argue that water companies generate enough profits to cover such costs. Furthermore, some consumers expect financial penalties to be enforced where suppliers do not meet their targets and that these penalties are not absorbed by consumer bills.

“Where they're not perceived to be doing enough [about leaks], questions aren't enough, financial penalties coming from the profits, the shareholders, not the customer. And I think that's where CCWater should be applying a bit of pressure.”
 (Female, Rural Cambridgeshire, 55-74, ABC1)

- 7.3.5. A Sustainability Manager with a major retailer linked failure to deal with leakages to reduced water levels in reservoirs and ultimately to water quality as he said the concentration of contaminants is greater when reservoir levels are lower.
- 7.3.6. A minority, however, accept that water companies do deal with the majority of priority leakages and would expect some cost to be passed to the customer if all, or a higher proportion of leaks, were to be fixed.. Those who were shown costs associated with dealing with leaks (which were far higher than many expected) were especially likely to expect some costs to be passed to customers.

7.4. What Action do Consumers Want CCWater to Take?

- 7.4.1. In response to issues of water quality and supply, consumers feel that CCWater's role is to be a campaigner pressurising the relevant parties to ensure that standards are maintained and improved and that, where service is not deemed acceptable by consumers, action is taken.
- 7.4.2. Consumers identify a number of possible actions CCWater should be taking.
- 7.4.3. **Continued monitoring of the quality of water** – consumers expect an uninterrupted and high standard of water supply. Where areas experience hardness, discolouration, high/low pressure or unpleasant taste of water, such issues should be looked into and reconciled where

possible. A close relationship between CCWater and the water companies is viewed as essential in ensuring the network is maintained.

- 7.4.4. **Research/reassurance on what is being put into the water** – with concerns over fluoridisation, there are requests that CCWater look into the impact of these and establish if acceptable or not. It was also linked to education (especially in reference to fluoridisation) that CCWater should play a part in informing consumers of the pros and cons of these as a lack of knowledge can lead to fear of the unknown.
- 7.4.5. **Greater pressure in relation to leakages** – consumers want to see CCWater putting more pressure on water companies to deal with a greater number of their leakages (to match their own efforts in conserving water). They also want more pressure on Ofwat to impose financial penalties where targets are not met. Many consumers remained unimpressed by arguments that it is uneconomic for water companies to plug certain leaks. This is partly because they feel that dealing with leaks would in the long-term be the most financially appropriate action, but also because they think seeing water gushing out onto busy roads while water companies fail to solve the problem, is a major disincentive against people conserving water themselves. People wonder why they should treat water seriously if the water companies fail to do likewise.

“Water is a valuable commodity and if they are not going to repair leaks that they say is uneconomical, that is not right.”
(Male, Sutton Coldfield, 55-74, C2D)

7.5. Should Water on Tap Continue to be a Focus for CCWater?

- 7.5.1. Water quality and supply is a significant priority for consumers who wish to see a continued high standard of water services and improvements where possible.
- 7.5.2. Most commonly on the subject of supply, consumers demand greater action on the issue of leakage. Whether this appeal is due to informed opinion or the influence of media coverage is uncertain but on existing procedures being explained to participants, current action was not deemed sufficient.
- 7.5.3. **Research Conclusion: Water on Tap should continue to be a priority encompassing issues around water quality and supply but with an increase in the focus on leakage targets**

8. Speaking Up for Water Consumers

8.1. Why is it a Priority?

- 8.1.1. Most participants recognised the importance of CCWater as an organisation which represents their interests in the water industry and ensures their issues are heard by decision makers. However with few previously aware of the organisation, people wondered why it was not better known by the consumers it represents.
- 8.1.2. A frequent recommendation was that CCWater needs to raise its profile and increase its visibility amongst consumers. They appreciate the value of its work when they learn about it but are baffled as to why they have not heard of it previously.

“So we’re talking about 7 years [CCWater has existed]. How is it most of us haven’t heard of it before? We all know a lot of the big organisations have consumer councils.”

(Female, Devon, 70+, ABC1)

“I know it’s only a small few pennies that we’re paying them but it’s still our pennies that we’re paying, so I think we do have a right to know who they are and what they’re doing.”

(Female, Stockport, 40-54, ABC1)

- 8.1.3. Lack of awareness is partly a reflection of the fact consumers have not needed to contact CCWater directly, having had relatively few issues with the service they receive, with an increased demand for the organisation to speak to them as well as for them, but they are keen for the current situation to change.
- 8.1.4. CCWater has existing aims to increase the proportion of consumers aware of meter fitting options and registered on special assistance registers and WaterSure/Welsh Water Assist. Although rebranding of assistance schemes and work with water companies has had some success in raising awareness of these options, many consumers were unfamiliar with the schemes at the time of the research. They believe it is important for CCWater, as an independent and unbiased party, to inform consumers about such choices as well as ensuring that water companies are promoting them.

“I think they could just raise awareness of themselves because if they are meant to represent the consumers, very few of us had actually heard of them but it just helps to actually know where you need to go to if you have got issues”
(Male, Leeds, 16-24, C2DE)

- 8.1.5. Although researchers were able to answer queries about the profile and relationship of CCWater with other industry parties, the fact that consumers do not know how well CCWater is known within the industry demonstrates that consumers do not know how seriously to take the organisation as a representative.

“There’s not a lot of people who would know who this Consumer Council are and may think they side with the water company”

(Business Interviewee, Accommodation/Food/Hospitality, Wales, 11-20 employees)

“I think they need to do a little bit more work on making people aware of who they are first of all and what they do because I’d never heard of them. Now I don’t hold out much hope, to me a company that only employs fifty people.”

(Female, Hexham, 40-54, C2D)

- 8.1.6. Consumers feel it is very important for such a consumer organisation to exist, especially in the current climate where people have concerns over the value for money they are receiving from utilities in general and about availability of water supply.

- 8.1.7. The Sustainability Manager of a major retailer argued that water could become as expensive as energy. He wanted CCWater to encourage and facilitate joint purchasing of water by groups of companies. He felt this would exert downward pressure on the price of water if buying groups were able to shop around to obtain the best deal. He did not feel that water companies were engaged with their customers. He believed that if groups of companies were to band together they could put pressure on the government and water companies and lobby for increased efforts to find long-term solutions for secure water supplies.

8.2. Vulnerable Customers

- 8.2.1. CCWater has an obligation to support vulnerable customers within the water industry but there are mixed feelings towards this responsibility from the general public.

- 8.2.2. Representing the needs of vulnerable customers did not emerge as a strong priority, with many assuming that this would come naturally if CCWater needs to represent all consumers. Many also claim that other public sector bodies would already be acting on their behalf.

- 8.2.3. Vulnerable customers themselves do not necessarily request particular attention or support from CCWater in any way. In our depth interviews a disabled Northumbrian woman had been told she was not eligible for additional help in relation to water because of all the other benefits she receives. An older Cardiff man with a skin condition had been told he applied too late for help in 2011 but was encouraged to apply again in 2012 (although he did not recognise the term Welsh Water Assist). Other depth interviewees with disabilities had not expected to be eligible for additional help. A group respondent in Sutton Coldfield said his wife received help as she had a skin condition.
- 8.2.4. In fact, given the current economic situation, some are more concerned about low income families with one or both adults working full-time than those with no wage earners.

8.3. What Action do Consumers Want CCWater to Take?

- 8.3.1. The consensus across the research is that CCWater can best represent consumers by increasing its profile to ensure it is aware of their issues and needs and acting on them in the most appropriate way. To do this effectively, consumers suggested a number of actions.
- 8.3.2. **Working with water companies and Ofwat to ensure the bill reference to CCWater is prominent** – consumers are surprised by the revelation that their bill would refer to CCWater and claimed it had not been noticed. As many state, they just look for the amount owed on their bill and rarely read other information. Suggestions include making it mandatory to include CCWater information on the front of the bill, using the CCWater logo rather than just text and simply making the reference to CCWater larger and more prominent.
- 8.3.3. **Using social network sites to detail achievements by CCWater** – pro-active marketing of successes by the organisation are seen as an economical, straightforward way to promote CCWater. With achievements such as the number of complaints resolved, financial benefits and rebates returned to consumers, and increases in the number signing up to WaterSure there are many stories which could be issued through social network sites. As with education recommendations, such releases are expected to be brief and eye-catching.

“Championing themselves so that we do sit up and think, oh right, so they are doing something.” (Female, Stockport, 40-54, ABC1)

- 8.3.4. **Establishing CCWater as the authority on water issues for consumers** – consumers believe that CCWater cannot just be respected within the water industry; the general public and businesses must also recognise it as the informed party. They suggested working with media channels and newspapers to ensure that when documentaries or investigative programmes or stories refer to water issues, CCWater is automatically called upon to share its insight.
- 8.3.5. In order to be regularly called on as an industry expert, some argued CCWater could not simply focus on pricing issues as water bills are simply not high enough for this subject to attract a lot of interest. CCWater representatives would have a better chance of raising their profile if they were also seen to be experts on environmental and sustainability issues linked to water.
- 8.3.6. **Maximising relationships with other parties in contact with water consumers** – with the assumption that organisations such as local councils are regularly in contact with their residents, it was suggested that CCWater can work with local authorities to encourage them to add information about CCWater and water issues generally. Giving details of CCWater’s website on Council newsletters sent to residents was seen as a helpful step.
- 8.3.7. A retailer suggested CCWater should maintain close relationships with Citizens Advice Bureau as if customers with billing or other issues with their water company were to approach CAB, they could be encouraged to contact a more specialist organisation (CCWater) to resolve their issues.
- 8.3.8. **National Water Day** – although not mentioned consistently across the research sessions, some general public focus groups and business interviewees raised the possibility of introducing a national water day or local open days where CCWater can attend/host events along with representatives from water companies. Such occasions could provide education to people about issues and the role of CCWater as well as having entertainment incorporating serious messages.
- 8.3.9. Such events might be sponsored by commercial organisations selling water-efficient products and it was seen as appropriate for CCWater to be working with such companies.

8.4. Should Speaking Up for Water Consumers Continue to be a Focus for CCWater?

- 8.4.1. Consumers believe it is very important for CCWater to continue achieving improvements for water consumers and ensuring their voices and opinions are taken into account. However part of this focus should incorporate raising the profile of the organisation generally, and educating consumers, so they have more informed views on water issues.
- 8.4.2. **Research Conclusion: Speaking Up for Water Consumers should continue to be a priority with greater emphasis on promoting CCWater and raising its profile.**

9. A Sewerage System that Works

9.1. Why is it a Priority?

9.1.1. The majority of participants included in the research had not directly experienced issues relating to wastewater and sewerage although some knew of family members, friends or neighbours who had.

9.1.2. Partly due to this lack of awareness of potential problems relating to sewerage and wastewater, some consumers did not initially believe that CCWater has a role to play in ensuring the efficiency of the wastewater service and monitoring response to sewer flooding.

“I think we have got minimal sewer flooding and its one of the things that again you expect there will be problems, flash flooding and stuff like that does happen, but on the whole you just expect it to work fine.”

(Male, Sutton Coldfield, 25-39, ABC1)

9.1.3. However, when provided with examples of possible problems and their causes and resolution, consumers are in agreement that it is important for CCWater to focus on this area of the industry. They feel that it is valuable to have an independent body observing the processes of water companies to ensure they are appropriate and that consumers are adequately protected.

“I knew that sewers flooded but I didn’t know that it was a big problem I suppose I have been naive.”

(Male, Bushey, 25-39, ABC1)

9.1.4. Those who were aware of issues with wastewater and sewer flooding often provided both positive and negative examples of water companies resolving the problem. There were also instances where householders had taken responsibility for clearing blocked drains either from natural rainfall or from blockages coming from neighbouring properties. In some of these cases, consumers were unaware of whether they were actually responsible for clearing such blockages or if the water company could have provided greater support.

“When it rains really bad there’s a manhole that lifts and the stuff that comes out of there and it comes down my garden path and my next door neighbour’s garden path...They’ve [Northumbrian Water] been out but it still does happen.”

(Female, Hexham, 40-54, C2D)

“I have no choice because if we don’t pay [HomeServe] and we leave it, then it just comes up in the toilet and it will just flood the house with sewerage so we have no choice, it’s really unfair. My husband’s complained a few times, he sent it originally to the Water Board who passed it to someone else, I don’t know whether that would have been Ofwat, but we never had much of an explanation.”

(Female, Sutton Coldfield, 55-74, C2D)

- 9.1.5. A common theme relating to sewerage issues emerged in Wessex, Thames and Yorkshire, where participants suggested a lack of workers to deal with resolving flooding issues was a key factor. In some cases the outcome of this lack of trained manpower was perceived to be delays or the use of contractors.

“Wessex Water have reduced all of the sewerage staff to next to nothing and the amount of sewerage relaying projects that they’ve got on are just next to none. I think sewerage is going to be a big problem in the future for our region especially.”

(Male, Poole, 25-39, C2D)

- 9.1.6. In several regions, most notably North Wales, respondents complain that water company staff would visibly attend a problem but not actually fix it or take several attempts before the flooding ceased. They suspect lack of experience among the engineers is at least partly responsible for their failure to resolve flooding problems.

9.2. What Action do Consumers Want CCWater to Take?

- 9.2.1. With limited experience or knowledge regarding issues around sewerage and wastewater, consumers struggle to recommend ways in which CCWater should act. Researchers were able to brief participants on current actions which were then discussed and most consumers felt these were suitable.
- 9.2.2. There is agreement that CCWater needs to carry out a number of measures outlined below.
- 9.2.3. **Ensure that the sewerage system is sound and that water companies have continuity plans in place** – consumers believed CCWater can monitor the procedures of water companies and make sure they are appropriate.

- 9.2.4. **Liaise with water companies to establish whether responses to sewer flooding are quick and effective** – it was assumed that CCWater would be able to assess whether water companies are suitably responsive when sewer flooding affects consumers. As such they should monitor performance and hold water companies to account if actions are not up to standard.
- 9.2.5. **Better information for consumers and what can/can't be put into the drains** – there was evidence from some consumers that there is still some ignorance on what can be disposed of into the sewerage system. Some had also experienced blocked drains as a result of inappropriate items being disposed of by neighbours. Some respondents suspect that the people who put inappropriate items down toilets or drains were unlikely to read or take notice of communications. But others are more sanguine, arguing customer education programmes around recycling and other subjects have gradually borne fruit and feel information campaign on how to dispose of cooking oil, for example, could be very helpful.
- 9.2.6. **Support consumers in disputes with water and sewerage service suppliers if unresolved** – it was seen as important for CCWater to act as an unbiased intermediary between water companies and consumers if there were issues over the responsibility for dealing with sewerage issues. Consumers are concerned that if responsibilities for fixing or paying for a problem are unclear, the customer may end up paying to resolve the problem if it affects their own property.
- 9.2.7. **Ensure water and sewerage companies have appropriate manpower to deal with sewerage issues** – with consumers in some areas claiming a lack of manpower to respond to sewerage issues, some saw an opportunity for CCWater to liaise with water and sewerage companies to examine their resources. Consumers want reassurance that companies are able to deal with such issues if they arise.

9.3. Should A Sewerage System that Works Continue to be a Focus for CCWater?

- 9.3.1. Although focussing on sewerage issues is not always a priority immediately cited by consumers, in the context of water, following discussion, it is always viewed as being an important area for CCWater to be involved with.
- 9.3.2. Reassurance that procedures are in place to protect homes, businesses and consumers generally from sewerage issues is viewed as a significant part of CCWater's role.
- 9.3.3. **Research Conclusion: A Sewerage System that Works should continue to be a priority for CCWater, as there is a broad consensus that consumers require protection in this area.**

10. Value for Money

10.1. Why is it a Priority?

10.1.1. Most participants in the research feel their water and sewerage bills are comfortably affordable particularly in comparison to other bills. When analysing the services they receive, many consumers say they get value for money.

10.1.2. While most would clearly appreciate lower bills, they do not expect this to happen as they largely view this utility as affordable.

“Ensure that it’s fairer, not necessarily cheaper but fairer.”
 (Female, Devon, 70+, ABC1)

10.1.3. There are differences by region, with those in the South West and Wales more conscious of their water bills and commonly citing that bills are not acceptable, especially in comparison to bill levels in other areas.

10.1.4. For most of the business respondents, especially retailers and office-based organisations, water/sewerage costs were considered to be a very modest expense. However, for some organisations, such as those involved in catering, water could be a significant expense.

10.1.5. The manager of a working man’s club in Blackpool had trained his staff to minimise water usage but observed that he had much less control over his customers. Even with taps in the toilets that automatically cut off after a few seconds, he feels his water usage is high and cost is by far his biggest concern in relation to water/sewerage.

10.1.6. The energy manager of a manufacturer/supplier with several sites said that cumulatively, his water and sewerage costs were high in absolute terms, even if only a fraction of what is spent on diesel. He is concerned at the differences between WaSC regions. His Head Office in Yorkshire has modest sewerage charges but another site in Lancashire receives charges which he feels are unreasonably high. (He still feels charges to be high even after successfully challenging previous bills which the company eventually conceded were wrong.)

10.1.7. Domestic consumers experiencing higher than average bills are more likely to say value for money should be one of the main CCWater priorities. While other consumers do not think it is a core concern, believing their bills to be acceptable, they still feel CCWater needs to focus on it to some extent as they would not want water companies to have the freedom to raise prices without review or control.

- 10.1.8. We found that people in the South West generally know their area has higher bills. Some people in other areas with relatives in the South West know bills are higher there although strangely, a Bushey woman claimed her mother who had moved to Plymouth had much lower water bills there.
- 10.1.9. There is a fairly widespread expectation that bills would be higher in London and the south east than elsewhere because the cost of living is higher there. Although respondents are often surprised when they are shown the typical price of water and sewerage bills in different regions most quickly grasp why a flat urban area with high population density would have lower bills than a sparsely populated hilly/mountain area, especially one with extensive coastline.
- 10.1.10. People in the South West feel CCWater should press for water bills to be more equal throughout different regions of England and Wales. Some of those in other areas are sympathetic but others argue high water bills are simply a downside of living in a pleasant, rural, coastal area.
- 10.1.11. Among lower social grades, there is patchy awareness of assistance schemes or WaterSure/Welsh Water Assist. Those who believed they would qualify and were unaware of the schemes were suspicious as to why they had not heard about them from water companies.

“You see that's another thing, why don't they [tell you about Welsh Water Assist].

(Female, Cardiff, under 40, E)

- 10.1.12. Consumers admitted that they were likely to only pay attention to the amount on their bill and no other information, and therefore some suggested water companies or CCWater should inform them of such options in other ways.

10.2. Metering

- 10.2.1. Many consumers across the research have experienced being on a water meter and these are fairly evenly split between those choosing to have one installed and those moving into a property already metered. Most had experienced a fall in their bills; even some with very large families had experienced lower bills as a result of moving to metered supply.
- 10.2.2. In Southern WaSC region, in areas where metering is becoming compulsory, there was little backlash against the system being imposed on consumers. Overall most accept that meters help consumers to monitor their usage and ultimately become more conscious of conserving water, albeit for financial rather than supply reasons.

“I don't think it's going to make a lot of difference, the way I've worked it out, price wise and that it's not going to make a lot of difference,..”
 (Female, Southampton, 55-74, C2D)

- 10.2.3. A Worthing based business interviewee living in the area has only two permanent occupants of his five-bedroom house and expects his bills to go down following compulsory metering.
- 10.2.4. But in the two Southampton focus groups, two individuals experiencing compulsory metering are resentful as they expect their bills to rise. One had kept a boat on his property which he had been hosing down, but since having a water meter installed had taken it to his father's home as he did not have a meter.
- 10.2.5. Both individuals who expected to pay more as a result of having a water meter argued against compulsory installation on the basis of freedom of choice. But it was no coincidence that they expected that they would personally pay more as a result of metering. Those who do not expect to be adversely affected themselves are less inclined to complain about lack of choice.
- 10.2.6. Larger households are more wary of the introduction of metering assuming that they are likely to be worse off if usage is measured but many are unaware of options to trial a meter for a year to test if this is the case.

“I always assumed that once you got the [meter] in you are stuck you know but that's made me actually think about getting a meter and trying it.”
 11. (Male, Wrexham, 55-74, ABC1)

- 10.2.7. In several groups (such as the Bushey group of young adults with no children) participants favour compulsory metering and feel CCWater should advocate this. This was the view of a large minority of participants overall but most participants in the research study feel that CCWater's role in the metering discussion should be to ensure that they provide a neutral, balanced and informed voice on the pros and cons of the system and the options available to people.

10.3. Competition

- 10.3.1. The issue of competition arose sporadically across the domestic consumer discussions and in business depths without any strong consensus for CCWater to explore the option further.
- 10.3.2. In several groups, especially with younger adults, respondents suggested competition could encourage lower prices and lead to improved service quality as companies seek to differentiate themselves. Some believe there should always be choice available to

consumers and having a monopoly in the water industry was unacceptable.

- 10.3.3. But others argue that the savings might be minimal compared to the hassle it may introduce and do not feel they have benefitted from competition in the energy market.

“I think there are greater issues that they should actually deal with as opposed to concentrating on competition of water, instead of that why don’t they work on trying to solve our water shortage or collecting as much water as they can or figuring out ways to actually re-use water.”

(Male, Leeds, 25-39, C2D)

- 10.3.7. In contrast, business consumers are more in favour of the idea of competition. Although some businesses are aware of the options for businesses using a large volume of water to switch supplier, many do not know that it is an option. On discussion, many smaller businesses not using considerable volumes of water are nevertheless in favour of CCWater exploring the option further for all businesses. Many feel that in difficult economic times, any savings a business can make to ensure its survival are potentially valuable, and businesses especially, endorse the principle of a competitive market.

10.4. What Action do Consumers Want CCWater to Take?

- 10.4.1. Participants were informed that Ofwat set pricing levels in consultation with water and sewerage companies. Nevertheless, it was felt that CCWater would take on the role of an independent adjudicator of influence on the subject of pricing.
- 10.4.2. To achieve this, it is expected to undertake a number of actions.
- 10.4.3. **Monitor bill levels and consult with Government, Ofwat and water companies** – consumers want reassurance that prices and any rises are being evaluated fairly.
- 10.4.4. **Helping consumers to know where their money is going and why it differs across regions** – some consumers felt they would be reassured about their bills if they knew how they were broken down and why there are variations across the country.
- 10.4.5. **Providing greater information on water meters** – consumers do not necessarily want CCWater to take a position for or against water meters but believe more neutral information detailing the facts about the system should be made available. (A minority of consumers,

typically those with small households and a strong interest in sustainability want CCWater to champion compulsory metering).

- 10.4.6. **Greater pressure on water companies to promote available assistance** – consumers, especially those who may be eligible, want alternative tariff options to be more widely advertised. In addition, some question the current criteria, querying for example the number of children needed to qualify, and want CCWater to explore the reasoning behind these.
- 10.4.7. **Greater support for those in areas of high bill levels** – with considerable regional differences in bill levels, support for those in areas of high prices is seen as important to ensure consumers are being treated fairly and equally. One suggestion was for the cost of cleaning coastlines to be spread across water customers in England and Wales rather than the customers of the regions with coastline.

10.5. Should Value for Money Continue to be a Focus for CCWater?

- 10.5.1. All consumers believe Value for Money should continue to be a priority area for CCWater although to varying degrees. Those in areas of high bills feel it is one of the most important areas whereas those whose bills are lower feel it does not require such great attention as long as CCWater continues to monitor it.
- 10.5.2. **Research Conclusion: Value for Money should continue to be a priority for CCWater, with a consensus that consumers need to be sure their bills are fair**

11. Good Service from Water Companies

11.1. Why is it a Priority?

- 11.1.1. The role which CCWater plays as an intermediary between consumers and water companies is not often mentioned spontaneously as a priority.
- 11.1.2. This is partly a reflection of the fact few respondents had had disputes with their water companies so the resolution of bad disputes does not immediately spring to mind. When this role is mentioned some suggest the title 'Consumers Council' indicates they would act as the consumer's champion and expect acting as an intermediary to form part of this role.
- 11.1.3. When prompted about this responsibility, most consumers believe it is vital for CCWater to play this part. As reported in reference to the need for education, many consumers feel ill-informed about water and sewerage services, the water and sewerage industry and their rights and responsibilities. Having the option of a knowledgeable champion is therefore seen as highly valuable.

*"We are all paying a fee for a service that if we're not getting that service, it is important to have someone who knows the industry to represent them."
(Business interviewee, Accommodation/Food/Hospitality, South West, 51-100 employees)*

- 11.1.4. Some participants, who had been in consultation with their water company about issues, continued to be unaware of CCWater or had only found it through searching online for general information and advice. They feel the service it provides requires greater promotion as it would have been highly beneficial to them.
- 11.1.5. Others conceded that if they had an issue with their water company, especially a billing issue, they would study their bill more closely so might see CCWater's details at this point.
- 11.1.6. Dealing with complaints was viewed as important. However some consumers felt the lack of visibility and awareness of CCWater suggests there are potentially many more complaints which should be advanced or passed to CCWater which are currently left unresolved. Indeed some felt that the average of 12,000 complaints handled by CCWater was a small number reflecting lack of awareness of CCWater rather than water companies' high standard of customer care. Respondents suggest this number would grow if CCWater

becomes better known, which could present a challenge to CCWater given its limited resources.

- 11.1.7. Discussion turned to whether CCWater should monitor water company quality of service as well as acting as an ombudsman. Most participants had not experienced any negative contact with their water company. In cases where an issue had arisen, these had largely been resolved satisfactorily directly with the water company. As such it is deemed important for water companies to have appropriate and helpful customer services but whether CCWater needs to be involved with monitoring this was undecided. Many feel that large companies such as water suppliers know how to achieve effective customer services without assistance.
- 11.1.8. A Londoner running a printing business had a personal experience of contacting CCWater when Thames Water was unreceptive and procrastinated when he asked them to resolve a problem at his home. He found CCWater details following an internet search. Once CCWater became involved Thames Water at last took the action he needed them to take.
- 11.1.9. He was impressed by the proactivity and personal touch of CCWater (they even sent a follow up email after the issue was resolved) and even more impressed by the clout CCWater appeared to have with his water company.

“We are living in an age where a domestic consumer is a nobody in the eyes of these privatised giants so we are always likely to be fobbed off. It is important for CCWater to have a very strong department with strong teeth that can take up complaints and stop people from being fobbed off”
(Business interviewee, Printing, London, 6-10 employees)

- 11.1.10. Based on his experience he regarded this ombudsman role as essential in keeping water and sewerage companies responsive to the needs of their customers.
- 11.1.11. The majority view across this study is that acting as an ombudsman and intervening on behalf of water customers experiencing poor service or billing issues is a very important function of CCWater and a role that no other organisation appears to be playing. CCWater is felt likely to have particular expertise making it well suited to this role, which could not be handled as easily by any other organisations.
- 11.1.12. A minority view is that CCWater should continue to offer this role but transfer some of its resources to issues such as pricing or sustainability that affect all customers, not just the small number having problems with their water companies.

11.2. What Action do Consumers Want CCWater to Take?

- 11.2.1. Consumers have clear ideas as to how CCWater could support them in the area of customer service and feel the focus should relate more to representing consumers where there are disputes rather than helping companies to improve customer service which is generally viewed as satisfactory. Recommendations for action from CCWater covered a number of areas.
- 11.2.2. **Ensuring water companies and Ofwat refer consumers to CCWater if dissatisfied with response** – some consumers doubt that water companies are likely to signpost consumers to CCWater or if they do, that it will not be obvious. Therefore CCWater may need to raise its profile in reference to its work as an intermediary or insist that companies do more to make unhappy customers aware of them.
- 11.2.3. **Better promotion of the service** – Supporting the finding that consumers want greater visibility of CCWater generally, they also believe the support and guidance available to consumers when dealing with water companies should be better advertised. Similarly to recommendations for Education and Speaking Up for Water Consumers, such promotion is suggested through social network sites, media and other interested parties.
- 11.2.4. **Act on consumer's behalf/advise where relevant** – consumers feel that the intermediary service CCWater can provide is priceless but being able to offer impartial advice and guidance to consumers when requested is also potentially valuable.
- 11.2.5. **Monitor the support water companies provide to their customers** – although it is felt that CCWater do not necessarily need to advise water companies on the customer service they offer, it is still deemed important for CCWater to measure how good such a service is for consumers. (Even when informed Ofwat is tracking customer satisfaction with contact and linking this to price levels permitted, some suggest CCWater should study the results and ask to be involved in the project).
- 11.2.6. **Deal with consumer case files effectively** – consumers want to be reassured that any case they have dealt with by CCWater is managed appropriately. They are often impressed by the idea of a named contact handling the cause but are content to have different people working on their case so long as their files are stored correctly and can be accessed when needed.

11.3. Should Good Service from Water Companies Continue to be a Focus for CCWater?

11.3.1. Having an independent representative to support consumers through any dispute or dealings with their water company is viewed as important. This is largely because they trust the advanced knowledge that CCWater is likely to have and consequently the advice and action it will take on their behalf.

11.3.2. **Research Conclusion: Good Service from Water Companies should continue to be a priority for CCWater to help them resolve issues with their water company. It is generally accepted that offering such a service would account for a significant proportion of CCWater's overall resources and there is a broad consensus that consumers need the support of an informed impartial party**

12. Conclusions

12.1. Views of Priorities

- 12.1.1. While Good Service from Water Companies is not high in terms of saliency or spontaneous mentions respondents are very keen for this service to be maintained, and even expanded to cover more complainants. In the first phase of research Education and Water on Tap were cited consistently as potential priorities for CCWater and there was a degree of consensus that these two were of most importance. Often this was because actions in these areas are likely to have a direct impact on the majority of consumers.
- 12.1.2. The level to which each of the remaining priority areas are considered important tended to vary according to a range of aspects, especially age, social grade and region.
- 12.1.3. Those in the South West and Wales as well as those of lower social grades and to a certain extent, younger adults, are likely to cite Value for Money as their core concern and therefore an area where action by CCWater would be most appreciated. While those in other areas still want CCWater to be attentive in regards to value for money, the affordability of their bills makes it a lesser concern than some of the other factors.
- 12.1.4. Some consumers (most notably those in areas of lower bill levels) queried the proportion of CCWater's resources allocated to value for money (around 30%) as many believe water bills to be comfortably affordable.
- 12.1.5. Sustainability came across most strongly in the interviews with the sustainability manager of a major retailer and in older and higher social grade consumer groups but unlike other priorities, was downplayed by some consumers either as unimportant in comparison to other issues, or by more knowledgeable consumers, as an area where CCWater could not realistically expect to play a major role. For those mentioning this area, it is often perceived as one of the most important issues for CCWater to deal with, however the fact that other consumers do not acknowledge it as an area where it should play a major role means CCWater needs to assess whether to make this a priority. The lack of consistency in consumers' views suggest this would only be an agreed priority for CCWater if their stance was to encourage further research and experimentation in this area. What we did not find in this study was any very widespread view, following the dry winters, that CCWater should be accepting compulsory metering, large price rises and/or severe restrictions on water usage to help preserve supplies.

12.2. Moving Forward

- 12.2.1. The 2012 research has found that the Forward Work Programme and Operational Business Plan are fit for purpose and fundamentally approved by both domestic and business consumers.
- 12.2.2. Across the research, there is agreement that the existing five priority areas should continue to be areas of focus for CCWater and that the ways it currently fulfils these are mostly in line with consumer expectations and preferences for action.
- 12.2.3. Some further development will however ensure that CCWater is fully acting on consumer preferences and this includes:-
- Introducing greater focus on education TO consumers
 - Consumers want to see more direct interaction between CCWater and water consumers in the provision of information and advice.
 - Bringing greater pressure on water companies and Ofwat on issues of leakage
 - There is a desire for CCWater to take a tougher line on leakage response, targets and penalties.
 - Ensuring any reductions in water company expertise and manpower does not affect service to consumers
 - Consumers expect CCWater to monitor water company resources to deal with issues, (or to ensure that Ofwat does this efficiently) ensuring that there is not a reduction in quality of service.
 - Raising profile of CCWater
 - As a result of the lack of awareness of CCWater but respect for its role, consumers want to know more about the organisation, what it does to represent them and how it can support them.
 - If resources are available, some research into aspects of sustainability could be undertaken
 - while some dissent towards this priority area was uncovered, significant numbers of consumers raised this as a potential issue and view it as an essential area of priority for CCWater

Appendices

CCWater: Customer Expectation

Topic Guide Phase 1: April 2012

INTRODUCTION

Confirm

- SPA Future Thinking is conducting research on behalf of Consumer Council for Water
 - The Consumer Council for Water (CCWater) has represented water and sewerage consumers in England and Wales since October 2005
 - Respondent name
 - Household type (e.g. family/couple/single household)
 - Metered/unmetered (if metered, by choice or not?)
-

WATER/SEWERAGE COMPANY

- Who is your water/sewerage company? (**Check**, is that for water and sewerage services?)
 - Are they doing a good job?
 - Why/why not?
 - What is that view based on?
 - What should a water/sewerage company be doing?
-

EXPLAINING WATER INDUSTRY STRUCTURE

- Have you heard of CCWater before this research?
 - How did you hear about CCWater
 - What do you know of CCWater and what its role is?
- What do you currently know about the water industry? Water companies, if they are accountable to anyone etc?

I am going to show you some information about how the water industry is structured. This will help you to think about how CCWater can best represent consumers.

- Explain there are 10 water and sewerage companies and a further 14 companies which supply water services only (with sewerage services supplied by one of the 10 WASC)

SHOW HANDOUT: 'WATER'

- Read out/explain roles of water industry key stakeholders, all with distinct and separate roles using below if necessary:

Government

Defra (The Department for Environment, Food and Rural Affairs) is a government department in the UK. Defra makes policy and legislation, and works with others to deliver its policies in - areas such as:

- the natural environment, biodiversity, plants and animals
- sustainable development and the green economy
- food, farming and fisheries
- animal health and welfare
- environmental protection and pollution control
- rural communities and issues.

Welsh Government

Wales has its own government making policies and laws. Headed by the First Minister of Wales, the Welsh Government is responsible for areas such as health, education, language and culture and public services.

The Welsh Government is separate from the British Government, which retains responsibility for UK-wide areas such as tax, defence, foreign policy and benefits.

There are 3 Regulators

- Ofwat is the economic regulator of the water and sewerage sectors in England and Wales. Its key role is to make sure that the companies provide household and business consumers with a good quality service and value for money.
- Environment Agency (environmental regulation); managing and improving the water environment examining issues such as flooding; river and sea levels, river quality etc
- Drinking Water Inspectorate (sets the standards for safety of drinking water);

These three are all regulators but Ofwat will usually have the overall say in how things may affect water companies in consultation with all stakeholders

Supporting Organisations

- CCWater;
- Countryside Council for Wales;
- Water UK – the trade body for the water and sewerage companies

SPONTANEOUS CONSIDERATION OF CCWATER PRIORITIES

AS A REPRESENTATIVE OF WATER CONSUMERS (BOTH DOMESTIC AND BUSINESS) IT IS ESSENTIAL FOR CCWATER TO FOCUS ITS EFFORTS ON ISSUES WHICH ARE MOST IMPORTANT TO CONSUMERS. THIS RESEARCH IS BEING USED TO ENSURE THAT CCWATER HAS THE RIGHT PRIORITIES IN PLACE.

NB. THE COST OF HAVING CCWATER AS A CONSUMER REPRESENTATIVE IS AN AVERAGE OF 21p PER YEAR ON EACH CONSUMER BILL

- What do you think CCWater should be doing on behalf of consumers?
 - Is opinion based on experience of a particular issue, general interest/awareness, media coverage etc.
- Why is this an important issue?
- If not completely relevant reiterate presence of Ofwat, Environment Agency, DWI and ask
Given the duties of these other organisations, do you think this ties in with the role of a *consumer* representative?
- How do you think CCWater's involvement could benefit consumers? What result/improvement should it be working towards?
- **After each issue covered, probe** What else should CCWater focus on?

**Use 'potential priority sections' detailed below to probe specifics for certain areas if mentioned.
If group does not mention anything, these sections can be used as a prompt.**

POTENTIAL PRIORITY 1: VALUE FOR MONEY/PRICES PAID

Should value for money/prices paid be a priority for CCWater? Why/why not?

- Do you know how much you pay for your water and sewerage services?
- **IF YES:** How do you feel about what you pay for your water/sewerage services?
 - Are bills a concern? Why/why not?
 - Are they affordable? Why/why not?
 - Are they fair? Why/why not?

IF PEOPLE WANT LOWER BILLS

- Should this be lower charges for everyone? **IF NOT**, Who (e.g. vulnerable customers; SW customers)?
- Should this be lower charges throughout England and Wales? **IF NOT**, Where?

IF PEOPLE MENTION TERM 'VALUE FOR MONEY'

- What do you mean by this, low bills or service being worth the price paid?

SHOW CHARGING FOR WATER HANDOUT IF RELEVANT

SHOW AVERAGE BILL FOR CONSUMERS IN DIFFERENT REGIONS

- Is this what participants expected average bills to be across England and Wales? Why/why not?
- Are there any surprises here?
- Does seeing this, affect what you think CCWater should be doing in terms of prices paid by consumers?
- What do you know about water metering?
 - What do you think the point of water metering is?
 - Is it a good or bad system? Why?
 - Is it a concern for consumers? Why/why not?

Should water metering be a priority for CCWater? Why/why not?
- What do you think CCWater's position on water metering should be?
- Should it be in favour/against when consumers will be affected in different ways?

SHOW INFORMATION ON PROPORTION OF METERED CUSTOMERS IF RELEVANT

NB: THERE IS FINANCIAL ASSISTANCE FOR SOME CUSTOMERS (WaterSure/Welsh Water Assist)

Water companies currently developing their own 'Social Tariffs' in line with Government guidance

POTENTIAL PRIORITY 2: CUSTOMER SERVICE (RIGHT FIRST TIME)

- What do you mean by 'customer service'? What does it mean to you?
 - What do you think about the service provided by water/sewerage companies? Good/bad?
 - Why?
- What, IF ANY, issues are a concern, probe:-
 - Day-to-day service/support; Service in relation to unusual circumstances/need; Billing issues; Complaint handling
- How important is it for a consumer body to play a role in this? Why/why not?
 - Should it have customer service as a priority for all consumers or only certain customer groups? If certain groups – which?

NB. Customers with complaints against their water company are encouraged to contact their water company in the first instance and give them an opportunity to resolve it, if they do not or customer not satisfied with result, they can go to CCWater (water company/Ofwat would normally explain this to customer). CCWater deals with an average of 12,000 complaints per year

- Does knowing this, affect whether you think CC Water should play a role in this aspect of the water industry? Important/Useful/Necessary?

POTENTIAL PRIORITY 3: WATER QUALITY/USE (WATER ON TAP)

- Should the safety and quality of water coming out of the taps be a CCWater priority?
 - How do participants feel about the quality/safety of their own water supply?
 - Is safety and quality of tap water still a concern or a battle that has been won? Is *maintaining* quality as important as *improving* quality?

NB. reiterate role of DWI if required but clarify it is responsible for the safety of the water, monitoring drinking water tests from a scientific perspective; CCWater currently looks at the quality of it more in terms of consumer satisfaction with taste, appearance, odour even if it is safe to drink/use)

- What about having a constant and reliable supply of water?
 - Are there any issues or concerns around maintaining supply/ensuring consumer efficiency in their water use?
- What about restrictions on water use?
 - What do you think CCWater's position on water restrictions (hosepipe bans) should be? In favour/against/neutral?
 - Why/why not?
- Are these areas that should concern CCWater and be priorities for its scrutiny?

NB: If fluoride in water raised, probe on if CCWater should have a position on this, in favour/against/neutral?

POTENTIAL PRIORITY 4: SEWERAGE ISSUES

- What areas of service do you think of from the term sewerage services (e.g. network of sewers, pipes and pumps/sewage treatment works/sewer flooding, rainwater drainage)?
- Is sewer flooding a concern? Why/why not? What about flooding issues generally?
 - Do you think it is likely to be more or less of a concern in the future?
 - Why/why not?

NB. USE BACKGROUND INFORMATION 'WHERE DOES MY WASTE WATER GO' IF NECESSARY

- Should CCWater prioritise interest in sewerage and sewer flooding? Why/why not?
- What should CCWater's position be?
 - How important is it for a consumer body to play a role in this? Why/why not?

POTENTIAL PRIORITY 5: SPEAKING UP FOR WATER CONSUMERS

- Do water consumers need an organisation to represent them? Why/why not?
 - What should it be saying? To whom?
- How visible should CCWater be?
 - Is it important to just be there or should it be high profile?
- Do all consumers need to be represented or just particular consumers? Why?
 - if just particular consumers, which ones?
- How do you think vulnerable customers should be supported by CCWater?
 - What about those who are elderly, disabled, ill etc
 - CCWater has an obligation to protect the interests of vulnerable customers but should they be doing more?

POTENTIAL PRIORITY 6: ENVIRONMENTAL ISSUES

- How important is it to you as consumers that CCWater should concern itself with environmental issues within the water industry? Why?
 - Is it within its remit as a consumer representative?
 - What about the role of the Environment Agency?
- What should CCWater's position be?

POTENTIAL PRIORITY 7: LEAKAGE ISSUES

- Should CCWater concern itself with leakage on behalf of consumers? Why? What is it about leakage that CCWater should be involving itself with?
- Why should CCWater prioritise leakage levels of water companies?
 - How important is it for them to fulfil this type of role?
 - Is it within its remit as a consumer representative
 - What about the role of Ofwat?

PROVIDE FACTUAL DATA ON LEAKAGE LEVELS, TARGETS AND ECONOMIES OF SCALE, EXPLAIN THAT THIS IS HOW COMPANIES ARE EXPECTED TO DEAL WITH LEAKAGES AT THE MOMENT

- Does this make a difference to how important you think it is for CCWater to prioritise this issue on behalf of consumers? Why/why not?
- To what extent, if at all, should CC Water be pushing Ofwat/water companies to raise the bar on dealing with leakages?
 - IF MORE ACTION REQUESTED:-
 - How would you feel if water companies were expected to improve their leakage resolutions but this action raised your bill levels?

POTENTIAL PRIORITY 8: COMPETITION

- Should CCWater concern itself with competition on behalf of consumers? Why?

NB: Certain business consumers can get bills/customer service from a different supplier (actual water received is the same, through same pipes)
- How important is it for CCWater to prioritise action/examination of the potential of consumer switching water and sewerage service providers?
 - Why/why not?
- How important is it to have choice in your water and sewerage provider?
- How likely would you be to consider switching to another provider?
 - Why/why not?
- Is this as important an issue for CCWater to consider as others?
 - Why/why not?

SUMMARISE PRIORITIES IDENTIFIED

- Establish any consensus of opinion on elements named as CCWater priorities
- What should each of those identified be trying to achieve?

IF EDUCATING/INFORMING CONSUMERS IS A NAMED PRIORITY (E.G. EDUCATING ABOUT REASONS FOR REGIONAL PRICE DIFFERENCES; HOW TO PROTECT AGAINST SEWER FLOODING; LEAKAGE TARGETS ETC) ASK:-

- How important is it for CCWater to act not only as a voice FOR consumers but also a voice TO consumers?
- What kind of information do you think it is important for you to know?
 - (e.g. regional price differences; how to protect against sewer flooding; leakage targets, water company rankings in terms of quality of service etc)
- Are some of the priorities listed more important than others? Why?
 - Rank order key priorities

REVEAL CCWATER'S CURRENT PRIORITIES

- How does this compare to the list participants finished with?
- Check for anything **not** on CCWater list that respondents suggested
 - Explain if known, why this is not on the CCWater list
 - Do you still think that this should be a priority for CCWater? Why/why not?
- Check for anything on CCWater list that respondents **did not suggest**
 - Explain why this is included
 - Do you feel that this should be a priority for CCWater? Why/why not?
 - Is it as important as the priorities already identified by them? Why/why not?

REVIEW PRIORITIES

- In light of examining CCWater's actual priorities:-
 - What do you think CCWater priorities should be moving forward?
 - What should it be trying to achieve?

CONCLUDE

- Is there anything we haven't covered within the session which you think it is important to feed back to CCWater as it reviews their priorities?
- Thank _____ and _____ Close

CCWater: Customer Expectation

Topic Guide Phase 2: May 2012

INTRODUCTION

Confirm

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- Environment Agency (environmental regulation); managing and improving the water environment examining issues such as flooding; river and sea levels, river quality, drought etc
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Supporting Organisations

- CCWater;
- Countryside Council for Wales;
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EXPLANATION OF RESEARCH BACKGROUND

AS A REPRESENTATIVE OF WATER CONSUMERS (BOTH DOMESTIC AND BUSINESS) IT IS ESSENTIAL FOR CCWATER TO FOCUS ITS EFFORTS ON ISSUES WHICH ARE MOST IMPORTANT TO CONSUMERS.

RECENT RESEARCH AMONG CONSUMERS SIMILAR TO YOU HAS ESTABLISHED WHAT CCWATER SHOULD BE FOCUSING ON AS ITS MOST IMPORTANT PRIORITIES MOVING FORWARD. WE NOW WANT TO KNOW HOW YOU THINK CCWATER SHOULD GO ABOUT ACHIEVING THESE AIMS

EXPLAIN THERE ARE SEVEN CORE PRIORITIES AND WE WILL EXPLORE EACH IN DETAIL

PRIORITY 1: EDUCATION OF CONSUMERS

MANY PEOPLE WE SPOKE WITH SUGGESTED MORE EDUCATION OF CONSUMERS ABOUT THE WATER INDUSTRY AND SERVICES GENERALLY WOULD HELP THEM TO ENGAGE WITH THE ISSUES

- How much do you know about water and sewerage services and the water industry generally?
- What kind of things do you think it is important for consumers to know about in order to have an opinion/outlook about their water services?

WAIT FOR SPONTANEOUS RESPONSES BUT PROBE ON/OUTLINE FINDINGS ARISING FROM PHASE 1 IF REQUIRED INCLUDING:-

- Awareness of service options
 - Information on metering, when it will become compulsory, trial options, how it can benefit consumers
 - Information about assistance that might be available (e.g. WaterSure tariff)
- Awareness of how to use/conserve water
 - What can/can't be disposed of
 - Ways to cut back on water usage (basic tips such as shower vs bath, turn off tap when brushing teeth, dual flush toilets etc)
 - Information on why hosepipe ban/conserving water can make a difference to supply
- How the water industry/CCWater operates
 - Who is responsible for what aspects
 - What CCWater can do for consumers
 - How/why pricing varies
- How should CCWater be communicating such information to consumers? Why do you think this would work well?
 - Their website (**SHOW PRINTED EXAMPLES WHERE RELEVANT**)
 - Direct mail (**THIS WOULD NEED TO BE ADDRESSED TO 'HOUSEHOLDER' IF FROM CCWATER AS CUSTOMER DATA NOT ACCESSIBLE**)
 - Social media (twitter; facebook etc)
 - Working with water companies
 - Media campaigns
 - Promotions (such as free water butts, eco flushes etc)
- How likely do you think it is that you would actually pay attention to such material?

NB. SOME OF THIS INFORMATION LIKELY TO ALREADY BE INCLUDED WITH WATER BILLS, HAVE THEY EVER NOTICED SUCH EDUCATION PREVIOUSLY OR PAID ATTENTION TO IT.

- Why would they be likely to pay attention to such information if it was coming from CCWater?
 - **PROBE** Do they think they would really pay attention to such material if received?
 - How likely would they be to proactively visit/engage with websites/social media regarding such issues?
- What benefits might result from CCWater doing this?

- How feasible do you think it is for CCWater to be doing this?
 - Is it realistic given CCWater's limited resources
 - Are there more economical ways for CCWater to increase the education of consumers?
 - Increasing pressure on water companies to provide more information (issues of impartiality)?
 - Increasing pressure on water companies to make CCWater information/website more prominent on bills directing people to existing information if interested?
 - Trialling wider communications campaigns in pilot areas rather than blanket increase?

PRIORITY 2: STRATEGIC PLANNING/SUSTAINABILITY

ENSURING CONSUMERS DO NOT EXPERIENCE LOWER STANDARDS IN THEIR WATER SERVICES/DELIVERY IN THE FUTURE WAS VIEWED AS A VITAL FACTOR WHICH SHOULD BE PRIORITISED BY CCWATER

- What kind of things do you think it is most important for CCWater to be doing to ensure that supply is maintained into the future? FOLLOW UP EACH PROPOSAL Why is this important?

WAIT FOR SPONTANEOUS RESPONSES BUT PROBE WITH FINDINGS ARISING FROM PHASE 1 IF REQUIRED:-

- Push for greater research/development into utilising natural resources, harvesting rainwater more efficiently and conserving water overall
 - Development of new water sources
 - Consider pros and cons of de-salinisation to stimulate debate
 - Consider options for pressurising developers to consider greywater/brownwater use in newbuilds
 - Taking ideas from abroad where water conservation/utilisation is better progressed and pressurising Ofwat/Government to consider
- How should CCWater be doing this/working with other organisations?
 - How feasible do you think it is for CCWater to be doing this?
 - What benefits might result from CCWater doing this?

PRIORITY 3: WATER QUALITY/SUPPLY (WATER ON TAP)

CONSUMERS HAVE STATED THAT CCWATER NEED TO MONITOR CURRENT QUALITY AND SUPPLY OF WATER AND ENSURE STANDARDS ARE MAINTAINED

- What do you think are the key things CCWater need to be doing to ensure water quality and supply is maintained on behalf of consumers? FOLLOW UP EACH PROPOSAL Why is this important?

WAIT FOR SPONTANEOUS RESPONSES BUT PROBE WITH FINDINGS ARISING FROM PHASE 1/EXISTING POLICY IF REQUIRED:-

- Monitor what is being put into the water (e.g. fluoride; agricultural run-off)
 - Working with water companies to look after the network overall
 - Ensuring explanations/information is provided on arising issues and reasons behind actions such as hosepipe bans
 - Making sure there is fair distribution across the country
 - Ensuring that greater pressure is put on water companies to invest in dealing with leakages (**SHOW CURRENT LEAKAGE POLICY IF RELEVANT**)
 - Ensuring that financial penalties for not meeting leakage targets are enforced but costs of paying such fines are not passed to consumer
- How should CCWater be doing this/working with other organisations?
 - How feasible do you think it is for CCWater to be doing this?
 - What benefits might result from CCWater doing this?

PRIORITY 4: SPEAKING UP FOR WATER CONSUMERS

OUR INITIAL RESEARCH HAS SHOWN THAT CONSUMERS WELCOME THE IDEA OF HAVING A CONSUMER REPRESENTATIVE BUT MANY ARE UNAWARE OF CCWATER

- What do you think CCWater should be doing to raise its profile?
 - How feasible do you think it is for CCWater to do that?
- How do you think CCWater can best represent the opinions of consumers? Why?
- How do you think CCWater can support vulnerable customers? Why? (**EXPLAIN CURRENT POLICY IF RELEVANT**)
 - Raise awareness and take-up of support and assistance (e.g. WaterSure tariff and special assistance register)
 - Evaluating impact of policies/systems on vulnerable groups (e.g. impact of compulsory metering etc)
- What benefits might result from CCWater doing this?

PRIORITY 5: SEWERAGE ISSUES**MAKING SURE THERE ARE POLICIES AND SYSTEMS IN PLACE TO DEAL WITH SEWERAGE ISSUES WAS RAISED AS AN IMPORTANT PRIORITY FOR CCWATER**

- What kind of things do you think it is important for CCWater to be doing within the industry and with consumers to ensure sewerage issues are dealt with? FOLLOW UP EACH PROPOSAL Why is this important?

WAIT FOR SPONTANEOUS RESPONSES BUT PROBE WITH FINDINGS ARISING FROM PHASE 1/EXISTING POLICY IF REQUIRED:-

- Making sure the sewerage system is sound and water companies have continuity plans in place
 - Ensuring that water companies are dealing with sewer flooding efficiently and quickly
 - Supporting consumers in disputes with water/sewerage/insurance companies over who has responsibility for resolving problems/paying for them
- How should CCWater be doing this/working with other organisations?
 - How feasible do you think it is for CCWater to be doing this?
 - What benefits might result from CCWater doing this?

PRIORITY 6: VALUE FOR MONEY/PRICES PAID

MOST CONSUMERS WE SPOKE TO FELT THAT WATER AND SEWERAGE SERVICES RECEIVED ARE WORTH THE PRICES THEY PAY. HOWEVER THERE WAS STILL A ROLE FOR CCWATER TO PLAY IN ENSURING CUSTOMERS CONTINUE TO GET A FAIR DEAL. ADD FOR SOUTHWEST: AND THAT IN SOUTHWEST MORE SHOULD BE DONE TO EQUALISE CHARGES COMPARED WITH THE REST OF THE COUNTRY

- How do you think CCWater should go about ensuring consumers are receiving value for money? FOLLOW UP EACH PROPOSAL Why is this important? **(SHOW AVERAGE BILL HANDOUT IF RELEVANT)**

WAIT FOR SPONTANEOUS RESPONSES BUT PROBE WITH FINDINGS ARISING FROM PHASE 1/EXISTING POLICY IF REQUIRED:-

- Monitor bill levels and work with water companies/Government to make sure that any price rises by water companies are fair
 - Greater promotion/explanation of water meters and how they can benefit smaller households
 - Represent consumer views where policy such as compulsory metering can be economically detrimental to consumers
 - Explain to consumers where their money is going and how/why it may differ across the country
 - Greater pressure on water companies to promote existing availability of assistance such as WaterSure (Welsh Water Assist in Wales groups)
 - Monitor current eligibility criteria
 - Research/evaluate options for competition to stimulate debate
- How should CCWater be doing this/working with other organisations?
 - How feasible do you think it is for CCWater to be doing this?
 - What benefits might result from CCWater doing this?

PRIORITY 7: CUSTOMER SERVICE (RIGHT FIRST TIME)

IT WAS ASSUMED BY MANY CONSUMERS IN OUR INITIAL RESEARCH THAT CCWATER WOULD OFFER SUPPORT/ADVICE/MEDIATION IN DISPUTES WITH WATER COMPANIES AND SHOULD CONTINUE TO DO SO WHEN RELEVANT.

- How do you think CCWater should support customers in this way? FOLLOW UP EACH PROPOSAL Why is this important?

WAIT FOR SPONTANEOUS RESPONSES BUT PROBE WITH EXISTING POLICY IF REQUIRED:-

- Help water companies to improve their customer service
 - Ensure water companies/Ofwat refer dissatisfied complainants to CCWater
 - Act on consumer's behalf where relevant
 - Provide a CCWater case manager to each complainant
- **EXPLAIN CURRENT COMPLAINT TIMELINE/SYSTEM IF RELEVANT**
 - What benefits might result from CCWater doing this?

CURRENT RESOURCE ALLOCATION

CCWATER HAS TO MANAGE ITS RESOURCES AND BUDGET EFFECTIVELY AND CERTAIN ASPECTS OF IMPORTANCE REQUIRE DIFFERENT LEVELS OF INPUT. SHOW RESOURCE DIAGRAM

- To fulfil its remit and responsibilities, how do you feel about this distribution of resources
- How, if at all, do you think this should be altered? **(NB. THIS ALLOCATION IS FLEXIBLE AND WILL ALTER AS PRIORITIES AND EVENTS EVOLVE)**
 - Why/why not?

CONCLUDE

- Is there anything we haven't covered within the session which you think it is important to feed back to CCWater as it reviews their priorities?
- Thank and Close

CCWater: Customer Expectation

Topic Guide - Business: May 2012

INTRODUCTION

Confirm

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 - The Consumer Council for Water (CCWater) has represented water and sewerage consumers in England and Wales since October 2005
 - Respondent name
 - Business Type (Industry/Employees/Size)
 - Water/sewerage company – any issues?
-

EXPLAINING WATER INDUSTRY STRUCTURE

- Have you heard of CCWater before this research?
 - How did you hear about CCWater
 - What do you know of CCWater and what its role is?

EXPLAIN THERE ARE 10 WATER AND SEWERAGE COMPANIES AND A FURTHER 14 COMPANIES WHICH SUPPLY WATER SERVICES ONLY (WITH SEWERAGE SERVICES SUPPLIED BY ONE OF THE 10 WASC)

- Explain roles of water industry key stakeholders

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SPONTANEOUS CONSIDERATION OF CCWATER PRIORITIES

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- What do you think CCWater should be doing on behalf of business consumers?
 - Is opinion based on experience of a particular issue, general interest/awareness, media coverage etc.
- Why is this an important issue?
- How do you think CCWater's involvement could benefit businesses? What result/improvement should it be working towards?
 - How could it be achieving this?
- **After each issue covered, probe** What else should CCWater focus on?

Use 'potential priority sections' detailed below to probe specifics for certain areas if mentioned.

If participant does not mention anything, these sections can be used as a prompt.

POTENTIAL PRIORITY 1: VALUE FOR MONEY/PRICES PAID

Should value for money/prices paid be a priority for CCWater? Why/why not?

- Do you know how much you pay for your water and sewerage services?

IF YES: How do you feel about what you pay for your water/sewerage services?

- Are bills a concern? Why/why not?
- Are they affordable? Why/why not?
- Are they fair? Why/why not?
- Should CCWater concern itself with competition on behalf of businesses? Why?

NB: From 15 December 2011, businesses served by water companies in England which use more than 5000m³ (cubic metres) of water a year have been able to change their water supplier if their business premises meet certain criteria. The water which businesses receive stays the same but they are billed by a different company which will have its own rate of charge, and this same company produces bills and deals with customer service. (Note that at the moment sewerage services are not part of this and would still be provided by the original sewerage company).

In Wales the situation is different and for customers served by Dŵr Cymru Welsh Water and Dee Valley Water businesses need to use more than 50,000m³ (cubic metres) of water a year to be able to change their water supplier if their business premises meet the relevant criteria.)

- How important is it to have choice in your water and sewerage provider?
- How likely would you be to consider switching to another provider?
 - Why/why not?
- Is this as important an issue for CCWater to consider as others?
 - Why/why not?

POSSIBLE ACTIONS

- How do you think CCWater should go about ensuring businesses are receiving value for money? FOLLOW UP EACH PROPOSAL Why is this important? PROBE WITH CURRENT FINDINGS/EXISTING POLICY IF REQUIRED:-
 - Monitor bill levels and work with water companies/Government to make sure that any price rises by water companies are fair
 - Explain to businesses where their money is going and how/why it may differ across the country
 - Greater promotion of choice of supplier for eligible businesses
- How should CCWater be doing this/working with other organisations?
- How feasible do you think it is for CCWater to be doing this?
- What benefits might result from CCWater doing this?

POTENTIAL PRIORITY 2: WATER QUALITY/USE (WATER ON TAP)

- Should the safety and quality of water coming out of the taps be a CCWater priority?
 - How do you feel about the quality/safety of their own water supply?
 - Is safety and quality of tap water still a concern or a battle that has been won? Is *maintaining* quality as important as *improving* quality?
- What about having a constant and reliable supply of water?
 - Are there any issues or concerns around maintaining supply/ensuring consumer efficiency in their water use?
- Should CCWater concern itself with leakage issues? Why? What is it about leakage that CCWater should be involving itself with?
- Why should CCWater prioritise leakage levels of water companies?
 - How important is it for them to fulfil this type of role?
 - Is it within its remit as a consumer representative
 - What about the role of Ofwat?

PROVIDE FACTUAL DATA ON LEAKAGE LEVELS, TARGETS AND ECONOMIES OF SCALE, EXPLAIN THAT THIS IS HOW COMPANIES ARE EXPECTED TO DEAL WITH LEAKAGES AT THE MOMENT

- Does this make a difference to how important you think it is for CCWater to prioritise this issue on behalf of domestic and business consumers? Why/why not?
- To what extent, if at all, should CC Water be pushing Ofwat/water companies to raise the bar on dealing with leakages?

POSSIBLE ACTIONS

- What do you think are the key things CCWater need to be doing to ensure water quality and supply is maintained on behalf of consumers? FOLLOW UP EACH PROPOSAL Why is this important?

PROBE WITH FINDINGS ARISING FROM PHASE 1/EXISTING POLICY IF REQUIRED:-

- Monitor what is being put into the water (e.g. fluoride; agricultural run-off)
 - Working with water companies to look after the network overall
 - Ensuring explanations/information is provided on arising issues and reasons behind actions such as hosepipe bans
 - Making sure there is fair distribution across the country
 - Ensuring that greater pressure is put on water companies to invest in dealing with leakages (**EXPLAIN LEAKAGE POLICY IF RELEVANT**)
 - Ensuring that financial penalties for not meeting leakage targets are enforced but costs of paying such fines are not passed to consumer
- How should CCWater be doing this/working with other organisations?
 - How feasible do you think it is for CCWater to be doing this?
 - What benefits might result from CCWater doing this?

POTENTIAL PRIORITY 3: SEWERAGE ISSUES

- Is sewer flooding a concern? Why/why not? What about flooding issues generally?
 - Do you think it is likely to be more or less of a concern in the future?
 - Why/why not?
- Should CCWater prioritise interest in sewerage and sewer flooding? Why/why not?
- What should CCWater's position be?
 - How important is it for a consumer body to play a role in this? Why/why not?

POSSIBLE ACTIONS

- What kind of things do you think it is important for CCWater to be doing within the industry and with businesses to ensure sewerage issues are dealt with? FOLLOW UP EACH PROPOSAL Why is this important?

PROBE WITH FINDINGS ARISING FROM PHASE 1/EXISTING POLICY IF REQUIRED:-

- Making sure the sewerage system is sound and water companies have continuity plans in place
 - Ensuring that water companies are dealing with sewer flooding efficiently and quickly
 - Supporting businesses in disputes with water/sewerage/insurance companies over who has responsibility for resolving problems/paying for them
- How should CCWater be doing this/working with other organisations?
- How feasible do you think it is for CCWater to be doing this?
- What benefits might result from CCWater doing this?

POTENTIAL PRIORITY 4: SPEAKING UP FOR WATER CONSUMERS

- Do businesses need an organisation to represent them? Why/why not?
 - What should it be saying? To whom?
- How visible should CCWater be?
 - Is it important to just be there or should it be high profile?
- What do you think CCWater should be doing to raise its profile?
 - How feasible do you think it is for CCWater to do that?

POSSIBLE ACTIONS

- How do you think CCWater can best represent the opinions of businesses? Why?
- What benefits might result from CCWater doing this?

POTENTIAL PRIORITY 5: CUSTOMER SERVICE (RIGHT FIRST TIME)

- What do you mean by 'customer service'? What does it mean to you?
 - What do you think about the service provided by water/sewerage companies? Good/bad? Why?
- What, IF ANY, issues are a concern, probe:-
 - Day-to-day service/support; Service in relation to unusual circumstances/need; Billing issues; Complaint handling
- Do you think CC Water should play a role in this aspect of the water industry? Important/Useful/Necessary?

POSSIBLE ACTIONS

- How do you think CC Water should support customers in this way? FOLLOW UP EACH PROPOSAL Why is this important?

PROBE WITH EXISTING POLICY IF REQUIRED:-

- Help water companies to improve their customer service
- Ensure water companies/Ofwat refer dissatisfied complainants to CCWater
- Act on business's behalf where relevant
- Provide a CCWater case manager to each complainant

POTENTIAL PRIORITY 6: EDUCATION

- How important is it for CCWater to act not only as a voice FOR domestic and businesses consumers but also a voice TO consumers?

POSSIBLE ACTIONS

- What kind of things do you think it is important for businesses to know about in order to have an opinion/outlook about their water services? PROBE ON AND OUTLINE FINDINGS ARISING FROM PHASE 1 AROUND:-
 - Awareness of information on eligibility criteria for businesses to change supplier
 - Awareness of how to use/conservate water; what can/can't be disposed of
 - How the water industry/CCWater operates
 - Who is responsible for what aspects
 - What CCWater can do for businesses
 - How/why pricing varies
- How likely do you think it is that you would actually pay attention to such material?
- Why would they be likely to pay attention to such information if it was coming from CCWater?
- What benefits might result from CCWater doing this?

- How should CCWater be communicating such information to businesses? Why do you think this would work well?
 - Their website
 - Direct mail
 - Social media (twitter; facebook etc)
 - Working with water companies
 - Media campaigns

- How feasible do you think it is for CCWater to be doing this?
 - Is it realistic given CCWaters limited resources
 - Are there more economical ways for CCWater to increase the education of businesses?
 - Increasing pressure on water companies to provide more information (issues of impartiality)?
 - Increasing pressure on water companies to make CCWater information/website more prominent on bills directing people to existing information?
 - Trialling wider communications campaigns in pilot areas rather than blanket increase?

POTENTIAL PRIORITY 7: STRATEGIC PLANNING/SUSTAINABILITY

- Should CC Water be focussed on ensuring business and domestic consumers do not experience lower standards in their water services/delivery in the future?
 - Why?
- What kind of things do you think it is most important for CCWater to be doing to ensure that supply is maintained into the future? FOLLOW UP EACH PROPOSAL Why is this important?
- PROBE WITH FINDINGS ARISING FROM PHASE 1 IF REQUIRED:-
 - Push for greater research/development into utilising natural resources, harvesting rainwater more efficiently and conserving water overall
 - Development of new water sources
 - Consider pros and cons of de-salinisation to stimulate debate
 - Consider options for pressurising developers to consider greywater/brownwater use in newbuilds
 - Taking ideas from abroad where water conservation/utilisation is better progressed and pressurising Ofwat/Government to consider

- How should CCWater be doing this/working with other organisations?
- How feasible do you think it is for CCWater to be doing this?
- What benefits might result from CCWater doing this?

REVEAL CCWATER'S 5 CURRENT PRIORITIES

- How does this compare to the priorities identified by participant?

- Check for anything **not** on CCWater list that respondent suggested
 - Explain if known, why this is not on the CCWater list
 - Do you still think that this should be a priority for CCWater? Why/why not?

- Check for anything on CCWater list that respondents **did not suggest**
 - Explain why this is included
 - Do you feel that this should be a priority for CCWater? Why/why not?
 - Is it as important as the priorities already identified by them? Why/why not?

REVIEW PRIORITIES

- In light of examining CCWater's actual priorities:-
 - What do you think CCWater priorities should be moving forward?
 - What should it be trying to achieve?

REVIEW ACTIONS

- For any priorities not spontaneously covered, go back to each section and explore potential actions

CONCLUDE

- Is there anything we haven't covered within the session which you think it is important to feed back to CCWater as it reviews their priorities?

- Thank and Close