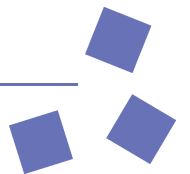




# The Customer Impact of Universal Metering Programmes

Report of research findings

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Prepared for:

Consumer Council for Water

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# 1 Executive Summary

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## 1.1 Research Requirement

Universal water metering of households is under consideration by some water companies and has already taken place, or is underway for others. While objective measures of the effects of compulsory metering are being gathered, this study was carried out to provide a more subjective account of the metering journey from the customer's viewpoint. It set out to understand the general impact on households of Southern Water's Universal Metering Programme (UMP) as well as the specific impact of the communications surrounding the programme, the installation process, and resulting changes in customers' bills. Impact was considered from the customer's perspective in terms of their understanding of the programme and why it is necessary, their attitudes towards, and concerns about it, and their attitudes and behaviour with respect to their use of water.

Given the need to explore customer views at different stages of their journey, six milestones were identified and customers were interviewed at each. These milestones started at a point before any targeted communications had taken place, through meter installation to receipt of the second metered bill. A mix of research methods was used.

## 1.2 Key Findings

### 1.2.1 Awareness, understanding and overall response to UMP (section 3)

- The findings suggest that the majority of customers are aware that the metering programme is taking place in advance of targeted communications, although for some customers, this was the first they knew of it. There is a high level of awareness of at least some of the reasons why it is necessary.
- Initial attitudes often depend on the expected financial impact of metered charging, and later in the journey, on the actual impact on bills. Most customers consider compulsory metered charging to be a fairer system, but those who expect to see/ have seen their bill increase, often feel that while it might be fairer for the wider good, for them personally, it seems unfair. Certainly, concerns about the financial impact of metering are uppermost in the minds of many customers and not just in larger households.

### 1.2.2 Installation (section 4)

- The process of meter installation is running smoothly for most customers with a minority experiencing small issues and just a few customers experiencing more significant problems and disruption.
- Customers vary with respect to whether they are inspecting their meter and some are concerned whether it is sufficiently accessible in order for them to read it themselves and monitor their water consumption.

### 1.2.3 Response to communications (section 5)

- The majority of customers are of the view that Southern Water has provided a large amount of information and even if they have not read it all, feel that the company has made a considerable effort to keep its customers informed. Moreover, the information is seen as easy to read and as having a friendly and reassuring tone.
- However, on closer discussion, it emerged that customers are often unclear or have an inaccurate picture about what they can expect with respect to metering and the decisions they have to make. Guidance on the potential size of their metered bills is seen as a gap to be filled so that customers can decide whether it would be of financial benefit to opt into metered charging at installation, to take up the changeover tariff (this aims to mitigate the move to higher metered bills for the first two years) and/or to try and reduce their water consumption.
- A number of customers report contacting Southern Water at different points in the metering journey, with mixed results; while some are very pleased with the response of helpline staff, others are frustrated by their apparent inability to understand the issues or give anything other than general advice.

### 1.2.4 Bills, billing and support (section 6)

- As might be expected, the larger households in our sample are more likely to expect and see an increase in their bill, but this is not always the case and some (both smaller and larger households) have been surprised to see an increase. While, for the majority, the water bill is one of their more affordable bills, a number are keen to point out that in the current economic climate, this does not

necessarily make them easy to afford and a proportion are concerned about paying their water bill if it rises significantly.

- The gradual process of moving onto metered charging is often a key message picked up by customers although the detail, for example, of the delay in ‘switching on’ of the meter and the changeover tariff is often hazy and sometimes incorrect. The option of being charged according to meter readings from the point of installation is not always known and if known, customers are uncertain how to decide about this.
- Features of the billing process seem to vary in their helpfulness. The ‘forecast bill’ provides a useful guide to water consumption for many customers who recall it. Information on bills comparing water consumption with households of various sizes is referred to but the findings suggest this can mislead customers into thinking that if their household’s use is below average, then their bill should not increase. They are unaware that if their unmetered bill was low, it is possible they will have a higher bill when moved onto a meter even if they are using less water than average. Other factors that may obscure what the size of bills will eventually be (and might give an unmerited sense of reassurance) include credits transferred from unmetered bills and changes to direct debits around the time of ‘switch on’.
- Prior to receiving their first bill, many customers are unsure about arrangements for paying their bills and there is a lack of awareness of specific schemes for customers requiring support in paying their bills.

#### 1.2.5 Effect of metering on water use (section 7)

- The research reveals a broad range of attitudes to water use and behaviour with respect to conserving water. The majority claim to be taking some action to cut usage and for many, these pre-date UMP. Others are taking measures as a result of metering and some anticipate having to do more if their bill increases. Yet others are unsure what else they can do or feel they have done enough and anything else will undermine their lifestyle. Indeed, among those who have seen an increase in their first/second bill, some are disappointed that their efforts have not had the hoped for effect on keeping their bill down.



- While many customers earlier in their metering journey are of the opinion that they will still be careful about their use of water even if their bill goes down, there are a few signs that a lower than expected 'forecast bill' has led some customers to become a little more relaxed.
- Most households claim to be doing simpler and well publicised actions such as not letting water run when brushing teeth, only filling the kettle to the required level or showering rather than having baths, while fewer customers are taking a larger number of measures including some that are more demanding.
- A number of potential obstacles seem to undermine water saving efforts including other members of the household who do not adopt such behaviours, perceived shortcomings in technology, financial constraints (meaning they cannot justify buying water efficient appliances), a lack of guidance on measures that would have greatest impact, lifestyle choices and the need to break old habits. There are signs in larger households that bill payers are making an effort to encourage children/ partners etc. to be mindful of their water use, with mixed results. However, those with disabled members in their household often find it difficult to make changes.
- Customers are generally very aware of the availability of water saving tips from Southern Water and other sources and while a few are still unaware of devices such as 'hippos', many want ideas that go beyond what they see as well known and largely common sense.
- The Home Saver Check, where experienced, is frequently valued for the guidance it provides on how to save water and sometimes, the reassurance given about levels of water use and the likely impact on the customer's bill.

### 1.3 Conclusions and Suggested Learnings

These are set out in section 9 in some detail in relation to, for example:

- The timing of communications about the metering process, the date of installation and the possible size of future water bills

- The importance of information received prior to installation when customers are most receptive to finding out what the changes mean for them
- The importance of striking the right balance in providing reassurance but also realistic information about the implications of metering for customers
- The potential for providing more opportunities for personal (ideally face to face) communications to ensure customers understand what is happening and the water saving measures they might take
- The need to communicate what the water company is doing to conserve water
- The advice given by helpline personnel to customers to give them greater guidance tailored to their circumstances
- The development of the water company website to provide easily accessible tools to help customers in managing their water use
- Attention to the trouble shooting aspect of installation to ensure any problems are quickly resolved
- The importance of providing customers with the means to estimate their metered bill and the likely effect of water saving measures on this
- Consideration of the need to opt into the changeover tariff and whether this might be automatic for those with bills that are a certain percentage higher than previously
- Consideration of the forms of financial support available to customers struggling with higher bills and how these are publicised
- The need to develop guidance on water saving measures that takes interested customers beyond current familiar advice
- Ways to bring other household members on board with water saving efforts.

## 2 Introduction

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### 2.1 Background

Two water companies in the South East of England are currently actively engaged in Universal Metering Programmes (UMP), with Southern Water being the most advanced and Thames Water due to begin a UMP programme shortly. Southern Water proposes to monitor the effect of UMP on key measurables such as reduction in demand for water, leakage detected and take up by households of various measures designed to support the transition from a water and sewerage charge based on rateable value (RV) to one based on water usage. A need was also identified for some assessment of the customer journey; how customers feel about the change, whether any concerns have been realised/addressed/not materialised and, importantly, has it changed the way they view or use their water services.

A combined team made up of Accent and Creative Research were commissioned by the consumer Council for Water (CCWater) to undertake a programme of research to address these issues and help inform future implementation by both Southern Water and other water companies.

### 2.2 Aims and Objectives

The business objectives for the project are as follows:

- To understand the impact on customers and households of the Southern Water programme and thereby enable CCWater to report on its effectiveness and any potential problems. This will enable lessons to be learned to inform the future roll-out and CCWater's discussions with other companies proposing compulsory metering programmes
- To capture lessons in terms of implementation, communication and the company support provided
- To provide CCWater with a rich evidence base of customers' experiences of being compulsorily metered
- To demonstrate how to devise and deliver compulsory metering programmes in the future, and particularly what mistakes to avoid.

While the overall aim is to explore what impact the Southern Water compulsory metering programme has had on customers, the specific research objectives identify the different forms this impact can take. They are to explore:

- awareness of the Universal Metering Programme and when this occurred; specifically, had customers picked up on the 'noise' generated by Southern Water via radio, local press etc. which began some two to three months before meters were due to be installed
- views on the style of the first personalised contact and the quality and usefulness of the information pack provided four to six weeks before installation including whether customers read it through and understood it
- likes and dislikes of the information pack
- understanding of what the company was proposing, and why
- experience during the implementation process including views on the courtesy of the installation team
- level of understanding regarding the meter, billing and how to use water efficiently
- views on the ease of access to information and help and whether any questions or concerns about the process were not covered by the communications
- views on the timing of communications about the metering process
- impressions of the first metered bill and whether it was what was expected
- views on the support provided through the transition – is the staged payment for new metered bills seen as helpful
- whether customers who were likely to receive higher bills with a water meter accepted the transition offers from Southern Water and, if they didn't, why this was

In addition, a number of other issues were identified for comparison pre and post meter installation. These are

- customers' attitudes to their water services
- attitudes to Southern Water
- whether customers have needed to contact the company about the programme and how many times
- views on affordability and fairness of bills and value for money of services
- has the meter changed the way bills are paid e.g. a switch to direct debit
- how customers think they will manage if their bills become no longer affordable
- awareness of options to help metered households on low incomes/with high water use for medical reasons
- whether the programme prompted customers to change their use of water and whether this was pre installation because the customer knew they were about to be metered or post installation
- did the first (or second) bill have any impact on their water use, if so what have they been doing differently
- whether they anticipate any changes in water use to be kept up over the long term and why.

## 2.3 Methodology

### 2.3.1 Research methods

The research took place over a number of months and adopted a mixed method, mainly qualitative approach. It was made up of eleven separate research strands that explored the views of customers at different stages of their journey, from before their meter was installed to after they received their second bill based on metered charging. The different data collection methods were used as follows:

- **Quantitative survey** – short, structured telephone interviews used where the prime aim was to assess levels of awareness of the metering programme in advance of targeted communications.

- **Semi-structured telephone interviews** where there was a limited range of issues to cover, taking less time but we needed to be able to explore responses.
- **Qualboards** – online bulletin boards in which a number of customers spread across different counties and areas take part over the course of a few days at times convenient to them.
- **Focus group** –to discuss the experiences of customers who do not have access to, or who prefer not to use, the Internet.
- **In-home depth interviews** were used at key points in the journey where, not only customers, but others in their household, were likely to be affected by the changes. Members of the household were visited in their homes and a proportion of these interviews were filmed.

### 2.3.2 Milestones along the journey

The views of customers were sought at different stages of their metering journey in order to focus on issues relevant to them at that point and thereby hopefully, capture their thoughts while still fresh. Six milestones were identified when research might usefully take place in order to address the range of research issues. These were as follows:

- **Milestone 1:** 6-8 weeks prior to installation of the meter

At this point, briefings will have taken place for stakeholders, local media, local community groups in the area, and customers may have become aware of the programme through word of mouth, media etc.

- **Milestone 2:** 4-6 weeks prior to installation

Various marketing communications, both mass and targeted, are available including the UMP advertising campaign, Mobile Exhibition Unit, and an information pack including a letter is delivered to households by the Customer Service Teams.

- **Milestone 3:** Installation of the meter

Along with the installation of the meter itself, customers receive a further information pack and a Customer Information Point is nearby, manned by Customer Service staff.

- **Milestone 4:** 3-6 months after installation

The next two milestones were combined for the purposes of the research. A 'switch' letter is sent to customers about three months after the meter is installed informing customers that their meter has now been 'activated' and the reading will, from that point, count towards their next water and sewerage bill. This is followed three months later by another letter advising them of their water consumption to date and likely water bill, and inviting them to opt for the transition or 'Changeover' tariff/ find out about the help that is available for those who have concerns about paying their bill.

- **Milestone 5:** 9 months after installation

Customers receive their first metered bill along with other information about water use and efficiency.

- **Milestone 6:** 15 months after installation

Customers receive their second metered bill along with a letter setting out their water use since the switch to metered charging.

Table 1 on the next page sets out the different research methods that were used at each milestone and when each strand was conducted. The duration of each type of discussion is shown in brackets.

**Table 1: Research methods applied to each milestone of the customer journey**

Milestone	Method	Timing
1: Pre-installation/ pre-marketing activity	200 telephone interviews (10 min)	October-November 2012
2: Pre-installation/ marketing activity current	Qualboard (over three days)	January '13
	Focus group with offline customers (2 hours)	December '12
	10 in-home depths (1 hour)	January '13
3: Installation	30 semi-structured telephone interviews (0.5 hours)	October-November 2012
	10 in-home depths (1 hour)	January '13
4: Post-installation – preparation for first bill	30 semi-structured telephone interviews (0.5 hours)	December '12- January '13
5: Post-receipt of first bill	Qualboard (over three days)	February '13
	10 in-home depths (1 hour)	Jan-Feb '13
6: Post-receipt of second bill	Qualboard (over three days)	February '13
	10 in-home depths (1 hour)	Jan-Feb '13

## 2.4 Research Sample

The aim was for the sample for each strand of research to be drawn from a mix of:

- socio-economic groups
- gender and age
- lifestage
- bill levels
- and to include a number of 'vulnerable customers'. For the purposes of this research, these customers included customers/ households who were in receipt of benefits, those who sometimes struggled to pay their bills, and those who



were themselves, or had a family member who was, disabled or had a chronic health condition.

The table below shows the intended sample structure for the semi-structured telephone interviews (based on 30 interviews) and demonstrates how we aimed to include a good mix of socio-economic group and lifestage; this pattern was followed for other strands of research (in-home depth interviews, Qualboards and the quantitative survey) although the number in each cell differed.

**Table 2: Sample structure applied to different research strands**

	ABC1	C2DE
<b>Pre-family</b>	3	3
<b>Family</b>	3	3
<b>Post-family</b>	3	3
<b>Retired</b>	3	3
<b>Vulnerable</b>	6 (as found)	

In practice, identifying and recruiting pre-family customers to take part in the research proved very difficult and they are therefore poorly represented in the sample. Details of the achieved sample for each strand of research are provided in the appendices.

Recruitment screeners were developed for each research strand and used by Accent’s telephone and in-field recruiters to check the eligibility of customers. Contact details for customers at the relevant milestones were provided by Southern Water and we are very grateful for their help with this. Given that the installation of meters does not always proceed according to plan due to unforeseen events, we found that on occasion, customers may have been recruited at one milestone but actually have moved on to the next or have been delayed at an earlier milestone. This was taken into account in the interpretation of the findings.

## 2.5 Nature of the Discussions

Discussion guides and questionnaires were developed for each research strand and these are included in the appendices. Copies of stimulus materials are included at appropriate places in the report.

## 2.6 Structure of the Report

The main part of the report provides the detail of the research findings. These are structured according to the various issues that the research sets out to address with findings from the relevant milestones reported under each issue. The findings are brought together in the final section as a series of conclusions and lessons that might be taken from the findings for future metering programmes.

The findings reported here are qualitative in nature and, as such, should be treated as broadly indicative of customer views and opinions. Nevertheless, care should be taken when generalising to the wider population of customers.

A range of verbatim quotes have been used to illustrate the findings in respondents' own language. Comments and questions from the moderator are shown in bold. Where a quote has been edited to improve the clarity, or where two quotes on the same topic have been combined from different parts of the discussion, this is indicated by the use of square brackets [ ]. Each quote is attributed in terms of the demographics of the customer and the milestone they have reached.

## 3 Awareness, understanding and overall response to UMP

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### 3.1 Introduction and key findings

- This section addresses the research objectives that relate to awareness of the metering programme and when this occurred, understanding of what the programme is intended to achieve and the general response to it.
- A high proportion of customers involved in the research had been aware of the programme in advance of the targeted communications; a good number had picked up on it through the 'noise' created by Southern Water in the media while others had been aware from before this as a result of more general publicity about water shortages. For some customers however, the information pack they had received was the first they had known about the programme.
- Customers were readily able to suggest why the metering programme was taking place with the main reasons given (often in combination) being;
  - To stop wastage
  - To save water for environmental reasons
  - It is a fairer charging method
  - It enables Southern Water to increase its profits.
- The first three elements reflect the explanation given for the programme by Southern Water and therefore there was little disagreement with this.
- The majority of customers considered compulsory metered charging to be a fairer system than the old one based on rateable value although customers who expected to see/ had seen their bill increase, often felt that while it might be fairer for the wider good, for them personally, it seemed unfair and they would prefer to be able to have the option of staying with RV charging.
- The fact that many customers would 'lose out' financially as a result of metering, and often those with families who could least afford to do so, led many to propose that Southern Water needed to demonstrate how it was matching customers' efforts to conserve water.
- Attitudes to the programme varied across the metering journey and often depended on expectations of the personal financial impact on customers and later in the journey, on the actual impact on bills. Most positive were those who were committed to the environmental reasons underpinning the programme and those who expected to gain/ had gained financially. The most negative were those worried about their bills increasing and how they would afford them, and also those who felt they had been led to believe they might expect a reduction in their bill but had seen the opposite. Those who were uncertain about the programme typically included those who were unsure how they would be affected by the new method of charging and those for whom, should their bill rise, affordability was not a problem.
- The financial impact of metering was therefore the principal concern for customers. In the early stages of the journey, such concerns were felt not only by larger households

but much smaller ones too because they simply had no idea how much water they used and what their bill might be. Later in the journey, concerns about the arrangements for billing and help that might be available were more to the fore and as some customers experienced or heard about leaks, this emerged as more of an issue.

### 3.2 Awareness of UMP

There was evidence that a high proportion of customers in our sample had been aware of UMP for some time prior to installation. At Milestone 1, i.e. in advance of any targeted communications, 80% respondents (n=200) said they had heard of the metering programme with half of these having heard about it in the last 3 months and nearly a third in the last month. About 38% of these (n= 160) thought they had been aware of the programme for over 3 months (13% for over a year).

A proportion of respondents from across the research felt they had been aware for some years of a move towards metering although this was often in the context of concerns about water shortages, for example, a number vividly recalled images of dried up reservoirs on the local television news. The offer of water saving devices such as ‘hippos’ by Southern Water were also recalled from before the metering programme.

*“I’ve definitely heard about it for a few years that this was going to happen. Because obviously in my situation I was thinking I don’t want it to go ahead... I knew it was coming; I wasn’t too sure where I heard about it. Probably in the paper or in the news or something. But I was aware of it and that’s been for a few years I think...”*

*... I think I’ve been aware that it has been a concern by the water board about the consumption of water. Because a number of years ago I got this, it’s like a blow-up bag you put in your cistern that can help conserve water.” (M2 Focus group)*

Other principal sources for the information that created this awareness were identified in the M1 survey as leaflets and letters (including some from Southern Water) and word of mouth (including friends and family); smaller numbers identified advertisements and features in the Daily Echo, Kent Messenger and on local radio including Heart London. These sources were also picked up by customers at other stages of the journey. The odd person had also seen a leaflet in a Post Office branch.

*“The area we live in I think they’re doing the whole of North West Kent because my social networking and people at work talking about it, saying, ‘this is coming, we’ve just had it’. It became obvious that it would appear, that Southern Water*

*were in the process of rolling out a programme. So it wasn't a surprise, no." (M3 telephone interview, C1, Family)*

There were therefore indications that the majority of customers had picked up on the 'noise' about UMP in advance of targeted communications and sometimes, well in advance. However, on occasion, the interval between untargeted publicity and having a meter installed could be very short and for some, the first information pack and letter were the first they had heard about the programme.

### 3.3 Perceived reasons for UMP

In response to questions about why they thought universal metering was taking place, four principal reasons were given, sometimes in combination. In large part, these were congruent with the explanation given by Southern Water.

#### **To stop wastage**

Customers often thought that metering would make people more aware of how much water they use and would stop them wasting it. At M1, around two in five respondents (41% n =200) thought that such a programme would make people think about their water usage. Elsewhere in the research, a number described wasteful practices by neighbours or family members or were open about their own unthinking and wasteful habits.

However, this very concrete reason was often not linked to alleviating water shortages or not without prompting; rather, there seemed to be the feeling for some that it was simply wrong to waste such a resource, especially one that was so precious for many people – something of a moral dimension therefore came into the picture.

*"When you see adverts on television for children dying through lack of water. And I think to myself how, that can't really be right when we can just slosh a load of water down the sink and not think anything about it. I think that's one of the reasons we should be made to be careful with what we consume." (M6 In-home interview, Retired, C2DE)*

*"He's always said to me for years you can't be without water. People take it for granted he said..."*

*...When you see the programmes and that of Ethiopia and Africa and you think...and there's no water...that's something I've always thought about. Whether I've had a meter or not, wasting water it's not...we just chuck it on the garden and people have got nothing to drink. It just makes you think sort of thing." (M3 In-home interview, Post-family, ABC1)*

*“I think it’s a good idea – I think you take water for granted, don’t you? Just turn the tap on, some people may just let it run and run and run without thinking and have as many baths as they want, so obviously if there’s a shortage out there, it’s got to be monitored in some way.” (M4 Telephone interview, Vulnerable)*

*“Well because I think if people know how much they’re using and once they realise they will have to pay for the amount they’re using, most people would want to try and cut down and that can only benefit everybody really, can’t it? Because you do get a bit blasé about it, paying the same amount every single time - especially in the summer because you think ‘Oh I’m going to put the hose on for half an hour and water my plants’ but if you know you’re paying for that, you’re not going to do it, are you? Well most people wouldn’t anyway.” (M4 Telephone interview, Family)*

## **To save water for environmental reasons**

Many were very aware that with increased development in the South-East, past water shortages, and for some, climate change, there was a need to conserve water.

Customers at M3, for example, overwhelmingly accepted that metering was necessary and there seemed to be a high level of awareness of the threats of water shortages/drought and the pressure from increased population in the South East.

*“It’s purely to obviously save the water, that’s got to be one. Obviously, the main reason is we just can’t keep using the level of water that everyone’s using and with the environment as well, we’ve got to make sure that we do save all these things and save our environment.” (M3 Telephone interview, Family, ABC1)*

*“Like I said, to make it fairer for everyone and the environment obviously. We do have some very strange weather patterns in this country, there are a number of issues like that.” (M3 Telephone interview, Family, ABC1)*

*“I would think there’s some sort of concern now with so many houses, how the water supply is going to feed all the houses. That’s what I’m thinking, maybe not in our area so much but thinking about Ashford. There’s more and more houses being built but is the water system going to be able to cope with all these new buildings?” (M5 In-home interview, Vulnerable, ABC1)*

*“They’re trying to look ahead by doing this, saving water and making it available all year round rather than just maybe the nine months and you get that three months in the summer when you’ve got to be very careful. It’s good.” (M2 In-home interview, Family, ABC1)*

However, the previous summer’s rainfall prompted a few sceptical comments from across the research. The view of a number was that, given the periods of heavy rainfall, and water shortage, the problem must be one of storage and saving water at times of plenty for use at times of scarcity.

## **A fairer charging method**

A large number thought that metering was being introduced because it was a fairer system of charging compared to rateable value and would bring water into line with gas and electricity in respect of paying for what one uses.

*“If you think about it fairly, I’ve got five adults, my neighbour’s got two adults, why should they pay the same as me? It’s all on usage. If I was in their shoes, I wouldn’t be very happy.” (M3 Telephone interview, Family, ABC1)*

*“I just assume it’s so everyone pays for what they use rather than everyone pays the same and some people use more than others; I don’t know.” (M4 Telephone interview, Vulnerable)*

*“It’s like the electric and gas, isn’t it? You pay for what you use really. You can get a family of four paying the same as me, being a single person...I think you were being penalised if you were a single person as opposed to, say, a family of five or six which are doing probably washing several times a week.” (M5 In-home interview, Vulnerable, ABC1)*

*“Well I do think it’s fairer because at the end of the day there are people who don’t abide by the rules, they don’t not use their sprinklers or they do use their hoses. There are people that leave taps running and why should everybody pay for the ones that don’t do it? And it is based on size of the house, the current way is and there could be more people living in it than in the next house so why should the people that are only living with say 2 or 3 people have to pay for what 7 or 8 people are taking?” (M2 In-home interview, Retired, ABC1)*

## **Enables Southern Water to increase its profits**

There were a few who were more cynical, feeling that Southern Water would not be taking steps to meter all its customers unless it profited from doing so; for example, through lower water treatment costs if less water is used. The view was also expressed that if water companies receive less revenue as a result of water metering because most customers’ bills go down, then they will increase the cost of water because they will not wish to make less profit. One customer thought this had happened on the Isle of Wight.

*“I think it’s a major money making scheme. Used to be under the town council, and it was a fraction of the rates. My belief is once we’re all on it they’ll put the prices up as much as they want – same as the electric.” (M4 Telephone interview, Retired)*

*“However I think the whole change by Southern Water into the metering system is for the benefit of the shareholders rather than the benefit of the planet and rather than for the benefit of people living in this country.” (M4 Telephone interview, Family)*

*“So they make more money I expect...I can't see any more reasons. It's got to be money at the end of the day. They can charge people with a large family more money.” (M6 In-home interview, Family, ABC1)*

*“The overall effect for Southern Water will be a decrease in water consumption, so to ensure their overall revenue does not decrease . . . the unit cost of water will go up for everybody.” (M2 Qualboard, Retired)*

In addition, a couple of other reasons were cited by a small number of customers.

### **Helps the water company understand how much water is being used**

There was an idea put forward by a small number of customers that seemed to hint at metering being used to assess what was the total amount of water being used to help the water company with planning its resources.

*“It's fairer. It's just to estimate what people use individually.” (M5 In-home interview, Family, Vulnerable, C2DE)*

*“I suppose they're trying to get it so the whole country is on meters. They'll show the whole country how much water we're using. And you've got water tables and reserves and that all over the country so basically they can do... there's only four million gallons in that one and seven million gallons in that one, but we've taken so many millions of gallons out of that one because they're using more water than they are and they are. So it's economical isn't it? Just on the basis of how much of the water is being used over the whole country.” (M6 In-home interview, Family, C2DE)*

### **Enables Southern Water to invest less to meet demand**

One particularly engaged M2 Qualboard participant felt that by reducing the overall amount of water people use, this would negate the need for extra investment in the water infrastructure, resulting in a cheaper solution to increased demand.

There was little surprise at the reason that was given in the research for the change to metered charging.

*“Current levels of water use mean that water resources, such as rivers, are under serious pressure. This is likely to get worse with population growth and climate change. Metering means that customers will be more aware of the water they use because they are being charged on the basis of what they use. It is also fair for everyone to be billed in the same way and it should also result in customers using less water.”*



For many, the explanation made sense and confirmed what they understood to be the reason for the programme; they felt that it should indeed, result in people using less water. Those who expected an increase in their bills also understood the reasons but many said they would still prefer to have been given the choice of having a meter (i.e they would not have opted to have one). A number argued that water shortages should be tackled in other ways such as through infrastructure development, desalination etc.

### 3.4 Perceptions of the fairness of UMP

In terms of whether customers felt that compulsory metered charging was a fairer system, their views seemed to take both a personal and a corporate perspective. From their own viewpoint, while most accepted the principle that one should pay for what you use, it was clear that the idea of greater fairness was also tied up with the ability to pay. Those who thought they would see/had seen a reduction in their bill tended to think it was fairer, although they were also often very concerned about families, their usage and their ability to pay. The larger households (especially those with young families) as well as others who were worried about a higher bill, might often see it as fair in terms of the wider good, but for them personally, it was unfair. While recognising that it is fairer if everyone is metered, they would prefer to be able to opt out.

*“Like they said, it’s fairer to pay for what you use but I can’t comment on it until I get a bill. So I wouldn’t know what to think until I actually get it. If the bill is less, then I know I’m doing the right thing, you know reducing the water. If I’ve done all that and the bill is still higher then I’ll have something to say about it.” (M4 Telephone interview, Retired)*

*“I mean, that’s my major concern is how much – obviously, bills are going up everywhere and my wages aren’t going up but I mean I just can’t understand. I can understand why they did it but I can’t understand why it has to be compulsory, that everybody has to have this fitted and that’s it. It seems a bit unfair.” (M3 Telephone interview, Family, Vulnerable)*

*“Like a lot of people, I wish I didn’t have to but I suppose if one should do it, then the whole lot should do it. The disadvantage is obviously we’re paying more. Some single people may pay less but it is going to hit our households very badly.” (M3 Telephone interview, Retired, ABC1)*

*“It is fairer because there’s only two of you. It’s not so fair if you’ve got a large family.” (M6 In-home interview, Family, ABC1)*

There was an occasional comment about how customers should have been told about the metering earlier – this would have been fairer rather than ‘springing’ the change on them.

The difficulty faced by some customers because of metering led some to comment on the bigger picture and Southern Water's corporate responsibilities; some opined that it would be fairer if Southern Water demonstrated what it was doing to alleviate the problem of water shortages and it was not fair if customers were making the largest contribution. They wished to know whether Southern Water was trying to tackle the problem in other ways such as stopping leaks, building more storage and bringing in water from water-rich areas.

*"I think there's enough wastage of water from the water companies themselves before they start looking at the amount of water that's being used by other people... There's leaks everywhere, you see leaks everywhere in the roads. They're never in any hurry to come out and mend them. They say that there's going to be a hosepipe ban but if they got their facilities to store the water done properly in the first place, we wouldn't have that when we have all the rainfall in the winter. They need to manage it better." (M2 In-home interview, Vulnerable, C2DE)*

A few other comments related to the fairness of bills which still retained some aspects of the old system i.e. the bill was based not only on a household's usage but retained elements such as the standing charge and highways drainage; indeed, a couple of customers thought that part of the bill was calculated using the rateable value system.

*"As for putting the water meter in and having the audacity to work some of it out on rateable value, I think is a bloody cheek. It's either all or nothing, you can't have rateable value and a water meter." (M4 Telephone interview, Vulnerable)*

*"It's all charged on the banding of your house, the standing charge. And your sewerage and the surface water and all that is done on the banding of your house." (M5 In-home interview, Post-family, ABC1)*

### 3.5 General response to UMP

#### **Before metering**

At M1, a quarter of those who were aware of the introduction of compulsory metering (n=160) considered it a good idea. When all 200 respondents were asked about the possible benefits, 2/5 thought it would make people think about how they used water and roughly a fifth thought it could save people money and reduce the risk of water shortages. This range of reactions was fairly typical across milestones 1 and 2.

Across the research, some customers had considered opting for a meter before the programme and were therefore pleased to have the decision taken from them (especially if they then saw a reduction in their bill). Otherwise at this stage, there was a

general, sometimes begrudging, acceptance that metering was happening – customers had no choice and they simply had to accept it. The hope of many was that they would not see higher bills and that it would solve the problem of water shortages.

*“It seems to be a good idea but I hope in the long term that it does not lead to higher water bills.” (M2 Qualboard, Family)*

*“In my eyes, if it’s proven that it’s going to help create a solution then why not? ... What is the problem, how – what are the figures, what is this going to prevent, how much is it going to help? I suppose, as it is being rolled out across this area, you believe that it is what you need to do because it is going to have a solution I suppose and you’re just gullible enough to perhaps go along with it because everybody’s doing it and it’s happening.” (M2 In-home interview, Pre-family, ABC1)*

However, some would have preferred to have seen more consultation and ideally, the option not to be metered.

*“Should have been able to have an ability to opt out – initially at least. And also giving people the ability, the chance and the knowledge to discuss things, improve things and whether they can oppose things and who they can discuss it with, where they should go and what they should do.” (M2 Qualboard, Family)*

### **After meter installation**

At milestones 3 and 4, customers were often happy to admit that metering had forced them to be more aware of their use of water and therefore the programme might deliver what it sets out to do. Many, even families, were hopeful that metering would deliver lower bills because they were taking steps to reduce their water use and some had been reassured in this by contacts they had had with Southern Water.

*“I was a little bit against it because I didn’t know whether it was going to save me money or not but now I’ve heard stuff about it, the guy’s been round, I’ve spoken to the guy from Southern Water and what have you, I’m all for it. I think it’s alright.” (M3 In-home interview, Family, ABC1)*

*“The positives for families without children, is that it’s saving them money. The negatives are that the families that have got children, possibly, is that it goes against them, but we don’t know until the first bill comes through. At the end of the day, in the economic times that we’re in, everyone is trying to save pennies.” (M3 Telephone interview, Family, ABC1)*

While some M4 customers had noticed and taken on board the ‘forecast bill’, others were still unsure about whether their bill would increase or fall, and were hoping that if not the latter, the bill might stay the same.

## After metered billing

Once they had received at least one metered bill, many, largely those who had seen a reduction, were supportive, and sometimes probably more so than previously, because they were now relieved at the outcome.

*“Nine months in, I am happy about having a meter = I feel more in control of our water usage and the bill has confirmed that our water controls (eg. rain water butts) are useful.” (M5 Qualboard, Post-family)*

In the opposite camp were those who were now more likely to feel that compulsory metering was unfair and that they were being ‘ripped off’. Some were particularly aggrieved if they felt that they had been misled in some way by earlier messages that suggested that as long as they were careful with their water use, they would not see large increases and bills might stay the same or even fall.

*“The whole advertising campaign they brought in was misleading because they said that you will save money, it will be cheaper for most families. It is not cheaper for families. It’s only cheaper for single people and couples but for families, it’s just a blatant rip-off.” (M6 In-home interview, Family, C2DE)*

*“Misinformation largely – inaccurate claims of reduced water bills, overestimation of potential (water) saving... Just made me worry about my bill when the transitional tariff ends.” (M6 Qualboard, Family)*

*“The forecast included an average water usage for a person and our actual usage for three people was less than the average for two, but the overall bill was still greater than without the meter - how can this be fair?” (M5 Qualboard, Post-family)*

**Across the customer journey**, the most **positive** about compulsory metering were those customers who could see the environmental reasons underpinning the change (these were often the people who claimed to be doing a lot to save water already) as well as those who could see that their bills were likely to fall or, who had already seen a reduction. The customers who were **uncertain** about whether UMP was a good thing were those who were unsure whether their bills would rise or fall and were worried about the impact on the affordability of their bills and their lifestyle if they had to cut consumption drastically. Customers who either expected to see or had seen an increase in their bill might also feel equivocal but this group might accept the necessity of the programme (assuming it works and water use is cut) and for them, affordability was not a problem. The most **negative** about UMP were predictably, those who were fearful that their bills would rise and who thought they might struggle with paying them

and, customers who had actually seen their bills rise and were either concerned about their affordability or disgruntled because they could not understand why this should be the case.

*“And at the moment we are using enough water for one and a half people with a garden. And it's costing more. So it didn't take long to do that did it, to cost more. And I'm not, I don't shower 3-4 days a week, because I swim in the mornings and I go and shower at the pool.” (M5 In-home interview, Post-family, ABC1)*

Among the more negative customers were also the most cynical who foresaw that even if they were better off at first, bills would need to rise anyway because Southern Water will see a drop in revenues and will need to cover the cost of the metering programme somehow.

*“I had concerns because I understand that the bottom line for any private company is to make money . . . My concerns have been proven to be so with the unfair implementation of the meters.” (M5 Qualboard, Post-family)*

Perhaps unsurprisingly, there did seem to be something of difference in views based on socio-economic group, with ABs found particularly among those with greater environmental concerns and fewer worries about affordability.

### 3.6 Concerns about metering

#### **Before metering**

A possible increase in their bill was customers' main concern in advance of metering and otherwise, there were few concerns (at M1 over half had no concerns). However concerns about their bill were not confined to larger households; those who might be expected to see a reduction were also sometimes worried; either because they had no idea how they might fare or, because they had heard from others that they could be worse off. Indeed, at this stage of the journey, talking to family, neighbours and friends (many of whom had now been through the experience) about what might happen was an important source of information and often coloured what they expected to happen and how they felt.

*“We had concerns as soon as it was mentioned we were being compulsory metered. My father said it would go up significantly as we had our family.” (M6 Qualboard, Family)*

*“I wasn't keen on the idea because my sister's on a water meter and she pays probably £20 more than me a month so it's the fear of obviously the water bill*

*going up in price but if it wasn't that, if it was going to stay the same then I wouldn't have a problem with it." (M2 In-home interview, Family, Vulnerable, C2DE)*

If customers had read the first information pack, they might feel reassured about certain of the messages in this such as the fact there should be little disruption during installation and help would be available with moving to metered billing for those whose bills are higher.

Leaks were not raised spontaneously as a cause of concern and when prompted, many had not even considered them as an issue. However, a couple of customers had experienced leaks in the past that had been sorted out and a couple also commented on how neighbours or other residents in their area had experienced leaks around their meter since installation. The overwhelming view was a leak alarm was a real asset assuming that it worked effectively.

### **After meter installation**

Once their meter had been installed, customers' concerns turned to their first bill and how this would be organised, with many uncertain about 'what happens now?' (see also 6.7). A few worried about 'other people' taking 'your' water, especially if they have a tap outside their house.

*"The other thing is, how does anyone stop anyone else using your water? This sounds really awful but we have a lot of travellers come here. Can someone just plug into your water supply and use your water and you be charged for it?.. I've seen them in people's, in the ground, under manholes taking water out and filling butts up. I work over the hill and I've seen them doing it. Someone will be paying for that water I guess. That worried me." (M2 In-home interview, Family, ABC1)*

*"See that's one thing I've been aware of, we've got a tap out there, an outside tap out the front. I keep on thinking we need to put a lock on there, somebody's going to steal our water." (M6 In-home interview, Family, C2DE)*

Some had also heard the odd story about faulty meters (occasionally their own) or a story featured on the radio about overcharging and a fight for compensation.

### **After metered billing**

At this stage, those whose fears about rising bills had been borne out were sometimes concerned about the squeeze on their household and how they would cope once the

changeover tariff expired. Some now worried about how else they could cut their water use if they feel they have taken large measures already without sufficient effect on the bill. This included a few who had discovered that they were paying more even though their usage was below average. Wastage through leaks was now seen as more worrying than previously especially for those whose bill had risen.

Even if customers had not seen a rise in their own bill, several voiced the concern that prices would rise for everyone in the longer term.

*“If people were previously encouraged to install meters on the basis of lower bills, . . . when everyone is on a meter, the prices will go up for metered users.” (M5 Qualboard, Retired)*

*“I’m just a bit worried about the future if the per unit is going to go up just like the electric and gas where they’re announcing massive, massive profits and not passing it on to the customer. They’re saying they’re struggling for costs, this, that and the other.” (M3 In-home interview, Family, C1)*

## 4 Installation

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### 4.1 Introduction and key findings

- This section focuses on customers' expectations and experiences of installation
- While a few customers had some concerns about the process of meter installation prior to it happening, most had been reassured by what they had read in the first information booklet and did not expect any disruption.
- Indeed, the experience of customers largely followed this pattern; most were very pleased that the installation went smoothly while a minority were a little less impressed. Just a few customers in this sample experienced significant problems and disruption.
- Some customers had inspected their meter and others intended to do so if they felt it necessary; however, there were signs that some were unaware that they could do so or felt that access would not be easy. Some would like to have been able to view their meter inside their house in order to monitor water consumption.
- It was pointed out by a number of customers that while they could check on their consumption by looking at the meter readings, they needed more information about how to translate those figures into an estimate of their bill.
- Questions were raised by a few customers about why some houses in their road had not been metered (often after some time).

### 4.2 Anticipation of the installation process

Customers who had received and read the first information pack were generally not concerned about what was involved in installation because it reassured them that there would not be any disruption although a couple of people at M2 were worried about the possibility of 'collateral damage' to their property. They wanted to know the likelihood of disruption to their own home as well as the immediate area surrounding it.

A few customers had an expectation that they would have further personal contact from Southern Water about when and where installation would take place and in general, the desire was for a clearer indication of the date. However, others seemed to know when their meter would be installed and for a small number of customers, this was because someone came to the door on the day to inform them.

*"They said they were going to fit a meter and they said they would knock on the door on the day they fitted it but no-one ever knocked on the door; they just fitted it." (M6 In-home, Family, ABC1)*

There was clearly much variation in the interval between the delivery of the information pack and installation and some were surprised at the short interval between the two (in



some cases, the following week) while others were surprised at the protracted interval (in one case, after a few months, a customer had received a second pack).

*“It was installed by stealth almost. We didn’t really have much notice. There was something, ‘water meters are going to be arriving soon’ and it was pretty much the next day there was a guy there popping them in. There was no time to even respond to anything.” (M4 Telephone interview, Family)*

*“I wasn’t expecting the installation for another couple of months, but then it was the following week that the guys were outside – that’s why I questioned them.” (M4 Telephone interview, Post-family)*

*“I’ve had a letter I think before Christmas with the first introductory pack, and this week I’ve had the same pack sent again, so part one has been sent twice, so I was a bit like ‘oh, okay, whatever’, put it aside. I did read that they would contact you when they’re going to make an appointment and seeing as I haven’t heard anything and I’ve had duplicate information, I assume that it’s not happening yet.” (M2 In-home interview, Pre-family, C1)*

One customer voiced a concern about shared pipework with his neighbour; his assumption was that unless he paid for new pipes himself, he would be charged for the water used by his neighbour.

### 4.3 Experience of installation

For the majority of customers, their experience of installation seems to have been a positive one. Many had hardly noticed that installation had taken place even if they had been at home at the time; it was quick, not too noisy, and the area was left at least reasonably clean. In the M3 telephone interviews shortly after installation, customers were asked to rate Southern Water on the level of support provided leading up to and during the metering process and the vast majority were very positive about this. Out of a possible score of 10, just over half gave a score of 8 or higher, and over two-thirds gave a score of above 6.

The courtesy and behaviour of the workmen was commented on positively in the majority of cases. Some had hardly noticed that they had been there while a few had spoken to them. For example, customers might have been told when the water was going off and coming back on again and if necessary once it was turned on again, to run it to clear any debris in the pipes. Where there was contact, the workmen were described as courteous and pleasant, and they were sometimes pitied for working in very cold conditions.

*“No problems at all; [the] water wasn't off for long, [the] stop cock [is] outside so [it's] easy to fit the meter. [The] workmen were very nice guys.” (M4 Telephone interview, Family)*

The issues that arose for the minority of customers included the following:

- Not everyone was informed about the need to turn off the water (even if they were in at the time) and some were then surprised to find brown water coming out of their taps. Some concern was expressed about the possibility of being in the shower/ doing washing etc. at the time and these customers felt it was important for householders to be kept informed so they could avoid using water at the time of installation. In one case, a customer was making dinner for her children and turning off the water was not convenient another woman claimed her shower had been broken as a result of water being turned off when she was unaware of this.

*“We were told that we were going to have meters put into the road but we weren't actually told a specific day so of course we didn't even know the water was going to be turned off. They just turned up and started doing it which I thought was a bit off really. I could have been in the shower if it's in the morning or I could have had the washing machine on which would have mucked that up.” (M3 Telephone interview, Post-family, C2DE)*

- Access to properties was occasionally impeded by workmen's vehicles or holes were dug and not covered which meant that an area could not be used. Some customers were a little unhappy especially when it was left like this overnight.

*“We did actually ask them to move because I was looking after my grandson and my wife was out and I knew she was coming back but they were very good about it. They said, ‘Can you just give us five minutes?’ and I said ‘yes’. They just then moved away from the driveway, and they left the area tidy.” (M3 Telephone interview, Family, C2DE)*

*“They were in the way, like their lorries, they were in the way a bit. It was a bit awkward because we all have drives here, and they did disturb quite a few people because they were in front of drives, but it was unavoidable I'm sure. I did have to wait in my car for 10 minutes, which was a bit of a palaver because I had to pick up my son from school.” (M3 Telephone interview, Family, ABC1)*

*“We got a small pack through the post, didn't give any dates. And then we see there was something on the lamppost at the end of the road. And I come in from work one day or my wife phoned me while I was at work one day and said ‘oh you won't be able to park on the drive tonight because they're putting the water meter in’. And that was it, it was pretty straightforward, wasn't it?” (M3, In-home interview, Family, Vulnerable, C2DE)*

- ‘Making good’ after installation was not always up to scratch for some; one woman described how her meter had been ‘buried’ so she had no access to it and some comments were made about the mud that was left. However, a couple of customers were happy to hose the path down themselves.

*“It was a bit muddy but you would expect that when they have been digging, it was okay.” (M3 Telephone interview, Post-family, Vulnerable, C2DE)*

*“They were all good, very clean, very good. I was here all the time, I think it just took about ten minutes. A bit muddy when they finished because it was raining but we washed that down with a hose.” (M3 Telephone interview, Retired, Vulnerable, C2DE)*

- Other incidents that were more disruptive were where workmen had apparently broken a pipe which led to the flooding of a living room, repairs to the floor and no water for a day; in other cases pipes banged and the water was not turned on again after installation had taken place. These were often very traumatic incidents for the customers concerned.

*“When I first heard, I was concerned about the extra cost (even though we were told it was likely to be cheaper) and the disruption of having it fitted... the workmen broke the pipe which meant no water for 24 hours as well as water coming up through the floorboards and most of our living room having to be taken up for repair.” (M6 Qualboard, Family)*

*“They said ‘right, we’ll get someone sent straight out to you to see what the problem is.’ But obviously there wasn’t a plumber local – I think he was having to come from London way.” (M4 Telephone interview)*

- There were also a few longer lasting problems around installation; in one case, a family’s meter was not functioning properly and it took some months to get it replaced and in another, it took a week to get a damaged stopcock fixed and a meter put in, and in yet another, leaks took time to resolve.

*“Eventually they rang back and said the contractor did actually run out of meters. They then took another week and a half before the same contractors came back. Second time it was fine.” (M3 Telephone interview, Family)*

*“It was found because of the very, very excessive water bill. They came out, it was 10 days before they actually came out. They took a reading when they did it and left. I had to then ring a number for I presume the head office or whatever and they left it a week and sent somebody out to read it. I didn’t have to be in because they can do it outside. They read it and actually come and knocked on the door and said to me ‘I’m very sorry but the leak, it still has a leak’ so all we’re assuming is that it was somewhere else as well as the one they repaired so they’re going to have to come back. So they had to come back and consequently they had to dig it all up again and dig the garden up and go through and they*

*replaced part of a pipe or something. So as I say, I was not happy but I will say, they did put the garden back as it was.” (M5 In-home interview, Family, ABC1)*

- In a few cases, customers had experienced some frustration with Southern Water personnel who had not seemed to appreciate the problem and as a result, it had taken some time to resolve it.

In addition to their own accounts of problems, stories were also related of other people's/ relatives' problems with their meter and issues of getting compensation.

Overall, about half the sample of customers (n=30) who had recently had their meter installed thought that the installation process had turned out better than they had hoped – they had been expecting some impact and yet there had been little or none. Others had had no expectations or did not expect it to be a problem and were therefore pleased that on the whole, it had gone smoothly. The small number who had specific complaints were clearly less satisfied but the following quotes are more typical.

*“The pathway was dug up in the morning, the water meter fitted and the pathway put back by the time we got home from work.” (M3 telephone interview, Family, ABC1)*

*“No, not a problem, they arrived, they did it, they went.” (M3 Telephone interview, Retired, Vulnerable, C2DE)*

*“I wasn't expecting anything, it just all went very smoothly, no problem at all.” (M4 Telephone interview, Vulnerable)*

*“I would have expected a long disconnect time. They were so quick, fast, did it as painlessly as possible. Probably because it's something so horrible, they probably thought 'you know what, let's install this as painlessly as possible' which they did.” (M4 Telephone interview, Family)*

#### 4.4 Interest in, and functioning of the meter

For most of those interviewed, their meter had been installed in the pavement outside their property and there had been no need to make an appointment to assess where it might be located. On the whole, they were satisfied with this, understanding that this was where the water came into their property/ where the stopcock was located. There was however a small number of customers who would like to have had the meter inside their house in order to check on it more easily, as with the gas and electricity meters. One customer spoke of having had the meter fitted in her kitchen.

*“It would be nice to be able to see what you're spending. Because if you have say like a gas or electric meter, you can see what you're spending. .. well with*

*the water meter, you're still not aware, it's more for that you know, it seems more for their benefit than it does ours...*

*... Because with all the electric companies and that, even without key meters they're sending you out smart meters so you can see what you're using and where you can save. But obviously, with the water you can't because it's in the middle of the pavement." (M3 In-home interview, Vulnerable, C2DE)*

Various levels of interaction with the meter were found:

- some customers had inspected their meter, checking to see if it was working or set at zero or to make sure there was not a leak

*"He went and had a look to make sure it was set because it says 'Your meter has been set at zero' so unless you looked yourself, you wouldn't have known that but yes, I didn't go and look at it but my husband did." (M3 Telephone interview, Family, ABC1)*

*"We've read it a couple of times. Just to see how quickly it was going up and to see if it was working. One of the neighbours has had problems, water leaking out of it so we checked ours to see if we had a problem." (M3 Telephone interview, Family, ABC1)*

In fact one customer had to check her meter because it was suspected that she had a leak (she did) and found this rather difficult to do

*"Because I couldn't see. I had to get on my hands and knees, get down and look in and I'm thinking is that going round, is that little thing going round and round and it was. So I presume there's numbers there as well and I would have had difficulty reading the numbers." (M5 In-home interview, Family, ABC1)*

- others thought they might at some point want to check on its readings especially if they wanted to query a bill

*"I will do. I do the same with gas and electric, I go out and read the meter and sit there with my calculator." (M6 In-home interview, Family, C2DE)*

- others were unaware they could access their meter or did not think it would be possible to access it - this was sometimes due to the difficulty of bending down/ seeing the figures, and sometimes thinking they needed a special tool to open the lid.

A number of customers felt that more guidance should have been given about accessing the meter.

*"Yes I want to, I've not tried yet. I am confident and competent although it would be courteous I think, to be shown." (M3 Telephone interview, Family, ABC1)*

*“Well, that is a bit tricky seeing as it is underground, well it is on the path, a communal path, but I suppose when you think about it, you should have access like your electric and gas. You have got your keys for them to open and read them, so I suppose just to make sure we are getting the right bills and things, it would be nice to be able to double check.” (M3 Telephone interview, Post-family, Vulnerable, C2DE)*

*“The first three months they just leave it to settle... I can't see mine because it's buried in the road. Which is the other thing; they can apparently read it with drive-by technology – wonderful, saves the cost of reading it etc. When they send a bill saying I've used 793 litres and I say 'what, I can't possibly'. But I've got no way of...*

*... You can lift it? Didn't you lift it?*

*... You can just lift the lid and look at it...*

*... Well nobody's told me that. All I know is, it's buried in the road at the top” (M2 Focus group).*

A few customers at various milestones commented on the fact that not everyone in their cul de sac/street seemed to have had a meter installed and they wondered why this might be. They felt it was unfair if some houses were left out.

As several customers pointed out, while being able to read one's meter was one thing, it was pointless unless you were able to understand what the reading meant, how to translate that into your water use and then into an approximation of what you might have to pay; i.e. how much you would be charged for those units (see also 6.9).

*“I am a bit concerned about not being able to understand the meter and how much I'm going to be paying.” (M3 telephone interview, Family, ABC1)*

## 5 Response to communications before and at installation

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### 5.1 Introduction and key findings

- This section covers customers' response to the various targeted communications they received. It looks mainly at the clarity and understanding of the content but also the design of the materials and how customer friendly these were deemed to be.
- The majority of customers were aware that Southern Water had provided a large amount of information and even if they had not read all of it, the company had made a great effort to keep their customers informed.
- The first information booklet entitled, 'Your new water meter is coming', was the piece of information that was most likely to have been read, with large numbers claiming to have at least skim read it and others having kept it to be 'read later'. This, like the follow-up booklet, 'Your new water meter is here', was seen as easy to read and as having a friendly and reassuring tone although this second booklet was often not read as closely or may not have been received at all.
- On closer discussion, it became clear that customers had either not engaged with the first booklet sufficiently to get an accurate picture or had misunderstood some of the more important information about what they should expect and the decisions they had to make. It was also felt to be missing guidance to help customers gain some idea of what their future bill might be, partly to enable them to decide about opting into metered charging at installation or to try and mitigate the higher charges.
- Of the various other ways used by Southern Water to create awareness and engage customers in the programme, the lamp-post signs had a high level of impact and created some sense of expectation. Information points available before and at installation were only occasionally noticed and very seldom used. Similarly, the majority of customers had not encountered a member of the customer service team going from door to door although when they had talked to one, the encounter was often reassuring.
- A number of customers had contacted Southern Water at different points in the metering journey, in relation to installation problems, concerns about how they would be billed and whether they could afford their new bill, and about any forms of help they might apply for with their bill; customers with disabled members in their household were often particularly concerned about the impact of metering on their bill.
- The performance of the helpline staff received a range of responses; some found them helpful and reassuring while others were frustrated by their inability to understand the issues or give anything other than general advice
- There was little evidence that the Southern Water website had been visited and where a customer had sought specific information, he was unable to find it.

## 5.2 Awareness of communications prior to installation

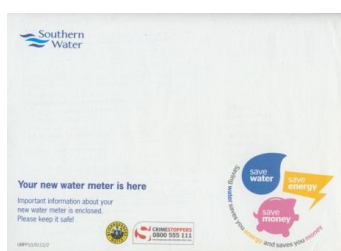
The general impression of many customers across the stages of the journey was that Southern Water had put out lots of information before installation took place and it was up to customers to read or access it.

*“I think they went to great lengths to make sure we were all very well informed.”  
(M4 Telephone interview, Post-family)*

*“We were very well informed, there was lots of warning and lots of letters through and stuff like that before it was all happening, and after it had been done to let us know it had all been done. It was very good.” (M4 Telephone interview, Family)*

The communication that made greatest impact was the first information pack sent out with the intention of arriving 4-6 weeks before installation, and in particular, the booklet entitled, ‘Your new water meter is coming’, sometimes along with the letter that accompanied it. The booklet was recalled by most, at least skim read by many and if not read, often put aside to be read later (this did not always happen however). The other pieces of information in the pack were often noticed but there seemed to be little engagement with them and the ‘pop-up cube’ that accompanied the pack was rarely even noticed which suggests that it may not always have been distributed. The take-out for a number of customers looking at the various items was that it might be better to incorporate all the essential information into a single guide because this was where they had directed most of their attention.

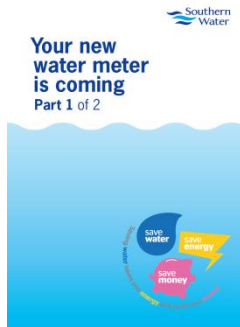
## 5.3 Response to the pre-installation information pack



As the first personalised contact from Southern Water, it appeared that customers were keen to find out what metering would mean for them and even if not read then and there, retained the pack to refer to later. Discussion of the pack revealed that while it provides an easy and reassuring introduction for many, certain points are not explained well and some customers struggle to understand them.



### 5.3.1 The booklet



For those customers who had skim read the booklet (probably the majority), the overwhelming impression was that the booklet is full of information, clear and easy to understand and has a friendly, persuasive and reassuring tone. Similarly, those who read it, felt the letter was customer-friendly.

*“Did read it all, found it an easy read, well laid out and felt all the questions were answered. Found it was written in a friendly tone.” (M2 Qualboard, Family)*

*“Tone of the letter is friendly and customer orientated.” (M2 Qualboard, Retired)*

When asked about any messages that they recalled from the booklet, various suggestions were made although often these were mentioned by just one or two people and some could recall little.

- A meter will be installed – you have no choice

*“I mean the question a lot of people were asking in the questions and answers was ‘do we have to have one?’ and of course we do according to Defra, but if I was given the option, I probably wouldn’t have had one.” (M3 Telephone interview, Post-family, C2DE)*

- You will be charged based on consumption

*“That I would soon have a meter installed and would be charged per unit used.” (M2 Qualboard, Family)*

- Why it is happening – it will reduce consumption and conserve supplies
- Contractors (who are sub-contractors) don’t need to come into your home
- You should think about saving water to save money

*“Water meter is coming. I should reduce my water usage. Meters are being rolled out to all customers.” (M2 Qualboard, Family)*

*“It said it will be installed in 4 to 6 weeks. It might be an idea to fill your kettle up and it might take 10 to 15 minutes to do, but in the long run it's going to save you money and it gave you a few tips like ‘take showers instead of baths’, that sort of thing, if I remember correctly.” (M3 Telephone interview, Post-family, Vulnerable, C2DE)*

- How a water butt might help
- There is a phased move to metered billing/ new pricing structures

*“I can remember it was about how they were going to phase the usage of water onto your bill, it'll be gradual and then you can query it or something. You weren't going to change straightaway. I was quite happy with that.” (M3 Telephone interview, Family, ABC1)*

*“I remember the stuff about billing, that was quite distinct. Well, I was interested in that because it was my money so I felt it was explained clearly as well, I quite liked seeing that. I can understand complex things as well. I felt it was well presented, I remember it catching my eye.” (M3 Telephone interview, Family, ABC1)*

- Bills will be capped if necessary

*“The only thing I remember that was good is there was a bit where they said that if the price of water you purchase goes over and above your last fixed charge bill, they would cap it at that rate. So there will be no horrible prices for water coming through. I very much hope that it [the bill] will be less than normal because I live on my own so I don't get through much water.” (M3 Telephone interview, Post-family, ABC1)*

- How to contact Southern Water including there is a customer care line you can call.

Those who read the booklet more closely, often offered a more critical response on the grounds that it does not provide information they seek. Moreover, others who were asked about their understanding of specific points came to the conclusion that they had not readily understood some of these (as some of the comments above indicate). The areas where there seemed to be confusion concerned

- When the meter would be installed
- Timings associated with the ‘switch on’ of the meter and the first metered bill

*“Yes, I read it several times. Yes, well it was quite informative, like I say, the part of it that says how your future billing is going to be was, I am not that thick, but I didn't understand a lot of that – ‘after three months ...’ Other people said ‘it is not*

*until after a year', you listen to others and you go back to read the leaflet and you think 'I am not entirely sure'. That bit, I didn't find very helpful as to how and when we start by the meter readings." (M3 Telephone interview, Post-family, C2DE)*

- What the changeover tariff is
- Opting for metered charging from installation
- Whether bills are likely to rise or fall

*"We've all asked that question. It says here, 'as households move to metered charges, about half will see their bills go down and about half will see an increase in their water bills'. It doesn't tell you anything... So it doesn't really answer its own questions." (M2 Focus group)*

*"But I think it's too persuasive without actually giving you the information you need to know, which is what's going to happen financially, when, what do I need to be considering, perhaps the fact that they will be installing these meters, you're not going to know exactly when and more of a personal touch needs to go into it. Yeah, I don't think it's very clear." (M2 In-home interview, Pre-family, ABC1)*

Some felt that the booklet seemed to give priority to less important information whereas the more important detail was packed into page 6, headed 'How will I be charged'. The section about the changeover tariff was identified as one which was far from clear (see also 5.5).

#### How will I be charged

We want to give you time to adjust to having a meter, so we will not convert you to metered charges until about three months after your meter is installed. We will inform you of a date nearer the time.

Your new meter will start recording the water that is used as soon as it is installed so when we convert you to metered charges the meter will not start with a zero reading. You will only be charged for what you use from the time you change to metered charges.

You can request to change to metered charges when your meter is installed, but please be aware this means you will not be entitled to opt for our 'changeover' tariff or apply for our support tariff. If you decide to wait until we change you to metered charges, we will not be able to back date metered charges to when your meter was installed.

All our customers will be given the opportunity to choose a 'changeover' tariff for paying their water bills. This means that if your metered bill is higher than your old bill, we will reduce your bill for the first two years – and you do not have to pay the difference. This is to help you adjust to paying for your water when you are paying for what you use.

If you need additional help in paying your bill then there are a number of schemes that can give you financial assistance, including our support tariff, New Start, Water Direct, Southern Water Charitable Trust Fund and the WaterSure tariff.

WaterSure provides financial assistance to customers who receive specified means-tested benefits who use large amounts of water for essential purposes. If you would like more information about any of these schemes, you can contact us on 0333 2003 013.

Your meter will measure how much water is used in cubic metres (one cubic metre = 1,000 litres). There is a unit charge for each cubic metre of water you use, and a unit charge for each cubic metre of wastewater you return to the sewerage system.

Bills are calculated on the basis that only 92.5% of water supplied goes into the sewers, because some is used in the garden or evaporates. In addition, we make a standing charge for each service to cover our customer service costs. We also charge for highway drainage and surface water drainage.

6

In the M2 focus group and Qualboard particularly (but also elsewhere), a few questioned whether the booklet was appropriate for those who might have visual impairment or specific problems with understanding (in particular for the elderly) and

indeed, a woman with cognitive impairment in the group found the information over-long and insufficiently clear.

*“I like to glance through something and it kind of has this overloading effect. I’ve got this part and so on and I’m reading through this. This by itself I could probably be okay with but then there’s this and I’m thinking ‘well I’ve got to digest this too’ and a lot of it crosses over and then I’ve got to check if it does. I know this sounds petty but it makes a difference of whether I bother or not. And yes, it refers to things that I don’t understand, the fact that I don’t do iTunes and what have tunes got to do with this? And then you know, they mention the shower head thing there but there’s no picture of a shower head thing anywhere. It’s just it feels very fragmented.” (M2 Focus group)*

*“I thought it’s – I thought it was well written, easy comprehensible language, yeah, and that was it. I don’t think it was very – to the eye I don’t think it was very appealing, it’s quite a lot of information – it’s quite a lot of writing to actually want to sit down and – seeing as this is the first piece of text you get that’s telling you, it’s quite a lot. As you’ve pointed out there’s many bits that I haven’t even read, I think it’s a lot to digest, or even want to read when you’ve just got in from work, and it’s the case of the first one I think I’ve got sitting in my handbag still, that I will look at when I’m at work and I haven’t had the opportunity to.” (M2 In-home interview, Pre-family, ABC1)*

### 5.3.2 Suggested improvements to the booklet

In terms of improving the booklet, a few suggestions were made, particularly in the focus group. It was proposed that the order of the information could be changed to give priority to the information that it is critical to know; in one lady’s case information about the financial help that might be available.

*“And maybe prioritise information so that things you don’t have to do can be right at the end. And say whether that was a free phone number or how much it is to ring because we all know with phone lines now we could be on there for hours. And more information on the financial, each financial support thing because actually I think my illness this year has involved forgetfulness and all sorts of mental problems so I suppose, I do need things to be very clear but I like it all there really and I think there are many people like me like that anyway.” (M2 Focus group)*

*“I found this whole safety-first thing a bit strange to be so close to the front of the book there, in light of the fact that this has only just come through the post, this is the first you’ve heard about it, obviously cold-callers and everything is publicly known, but I thought to have that promotion at the front rather than details on why we need this to happen and what will happen, a bit strange.” (M2 In-home interview, Pre-family, ABC1)*

Many customers would like to have some means of finding out/ estimating what their metered bill/direct debit was likely to be, even at this early stage. This could remove

some of their anxiety and possibly give them reassurance about opting in for immediate metered charging or, if their bills are to rise, think about ways to mitigate the higher cost.

*“When I first moved into my house and I contacted the gas board they said ‘yeah, we’ll set you up on a standing order of £x a month because that’s about the figure for that kind of house with that number of people’. Fine. ‘We’ll adjust it after the first year’ or whatever. There must be some way of being a little bit more specific because giving you the options, ‘you can opt for this’ or ‘you can opt for that’, ‘if you opt for this you can’t opt for that’. Oh. So that’s why I didn’t even think about going straight onto the meter reading though I’m hoping in the long term it will save. Because it says, ‘oh if you do that, you can’t have any other help’ and you think, ‘oh well, but I don’t know’. At least I know what I’m paying now. It’s not an unknown, could be higher, and could be lower, hmmm.” (M2 Focus group)*

Another idea was to include ‘case studies’ to illustrate how different sizes and types of household had been affected by metering; this might include the effect on their bill and measures taken to reduce this.

*“I think what might have been useful here would’ve been illustrations from people who had gone from ordinary supplies to meter and what was the impact it had on them. And then we could sort of measure ourselves against that. That would’ve been quite helpful. It just lacks illustrations.” (M2 Focus group)*

### 5.3.3 ‘Save-It’ fold-out leaflet



This fold-out leaflet was neither noticed nor read by everyone. A few described it as rather ‘childlike’ with its bright colours and illustrations and on occasion, the question was raised as to whether it was aimed at children. It was mainly criticised however, for the elementary nature of its water saving suggestions which were largely seen as common sense.

### 5.3.4 'Help your water footprint'



The offers for discounted water butts/ watering cans etc. from B&Q were viewed variously as helpful and signalling that Southern Water was trying to help, and not very useful because customers thought it likely that they could find better offers elsewhere/ via the internet. The comment was also made that including the offer gives an impression of junk mail.

*"I felt that the inclusion of this B&Q leaflet made the mailer more like junk mail. The booklet was the key thing and enclosing clutter with it reduces its impact and perceived importance." (M2 Qualboard, Retired)*

### 5.3.5 'Pop-up cube'



Only a couple of people had noticed the pop-up cube and generally, the point of this was not well appreciated. One customer recalled the 'pop-up' cube and how it had interested him at the time; he had wondered how it had come through the letter box and then made the connection with the information pack. He felt it was useful in differentiating the pack from the 'junk mail'.

*"There was a little cardboard cube, a coloured cube that sort of flattened and then they put it through the letter box without an elastic band and it popped up. And I was sitting there saying 'how's that got onto my ...?' and it wasn't until I worked out that it flattened. And that sort of got my attention and it said 'water meter' and that's what lead me to this [the pack]. I would've looked at it anyway...but there is a tendency as everyone says, with so much junk mail..." (M2 Focus group)*

## 5.4 Response to second information pack; booklet and letter



We found a number of customers at several milestones who had not received this second pack at the time of installation or any other notification. Most of these had been expecting to receive it (based on the first pack) and as a result, some were unsure whether their meter had been installed or not and therefore how to estimate when they should receive the next communication.

*“No, the only thing is we haven’t received this. We don’t know the exact meter reading and the exact day it was put in but obviously that would probably come with the first bill. But maybe the day, if somebody put out a card the day everybody had it done saying, ‘right your meter is installed on 2<sup>nd</sup> December’... and then you would know that three months from then, 2<sup>nd</sup> March, we’re going to start getting the bills or whatever.” (M3 In-home interview, Post-family, C2DE)*

As with the first booklet, those who had engaged with it in some detail, thought it ‘self explanatory’, informative, straightforward, nicely laid out and useful. The few messages that were recalled included:

- There could be bubbles in the water after the meter is installed
- You could opt in to immediate metered charging or wait (3/6 months)
- There was going to be phased billing of the new charges
- How long before the bills ‘kick in under the new policy’

*“There was a booklet and I think there was a letter as well explaining that it was set to zero and that they wouldn’t be billing us for a certain amount of time until it settled in and we would continue to have a water bill. It’s just general information on saving tips, how to save water as well, little tips and hints.” (M3 Telephone interview, Family, ABC1)*

- How you can delay payment for 6 months

*“Just about the options, that you can have a direct meter reading, or delay payment for six months or something like that.” (M3 Telephone interview, Post-family, C2DE)*

- Contact details in the event of queries e.g. if there are problems with the water supply.

However, there were indications that this booklet was not read as closely as the first and there seemed to be a number of reasons why this might have been the case. Firstly, some felt that the second pack looked so similar to the first that they were unsure that it would say anything different especially if they felt they had been given a lot of detail already. Secondly, a few customers had had an opportunity to talk to someone (a customer service team member or installer), and thought they must have been given the key information they needed.

*“Literally, what the young man said when he knocked on the door is what is in the leaflet, which is probably why I didn't take too much notice of it.” (M3 Telephone interview, Post-family, C2DE)*

Finally, there were those (often customers who resented the compulsory installation), who felt that now that the meter had been fitted, there was nothing that could be done about it and they just had to wait until the first bill.

*“Yes, we did receive that, I think because I was not particularly happy about having a meter, I really only glanced through it.” (M3 Telephone interview, Retired, Vulnerable, ABC1)*

*“I haven't read it yet, I haven't had time. To tell you the truth, it doesn't seem very important. It's been fitted and that's it. I think we simply accept that it was inevitable, it was going to happen sooner or later.” (M3 Telephone interview, Post-family, C2DE)*

*“The water companies have forced these changes on the consumer. As we don't have a choice, it didn't seem necessary to read up on it.” (M3 Telephone interview, Family, ABC1)*

It was notable that there were a small number of customers who said that they did not understand what was in the information and furthermore, from some of the messages taken out of the booklet, it appears that they were not alone in this.

*“I have still got it, I read it but it don't make no sense to me, I don't understand it - I dunno, just that it tries to explain what is happening.” (M3 Telephone interview, Family, C2DE)*

*“It was [clear] except for that bit, the bit that's saying it's going to be billed in three months time and I thought, 'well what for? For what we've used now or for what*



*we're going to use after three months?' It wasn't very clear to me anyway." (M3 In-home interview, Retired, ABC1)*

One customer made the point that he was surprised that this booklet specifically did not mention about how the billing would work since this was a key message he had got from the first booklet.

*"It [the first booklet] then went on to say, the first quarter or three month period they wouldn't do that, it would be duty free or something like that, and I expected them to emphasise that again in what they put through the door after it was installed and they didn't or at least I didn't notice it. The more detailed bit about billing was in what was posted to us directly in a matter of two or three weeks before, in 'the water meter is coming' pack. The pack was put through the door at the point of installation, I don't recall that repeating the stuff about billing which I'd expected them to, because I thought it was quite important." (M3 Telephone interview, Family, ABC1)*

A few customers suggested that it would be helpful if some of the detail from the second booklet was also included in the first.

*"Bits of that, obviously about the meter readings, about the changeover period and also about how the bills are going to be set up, if that was in the first pack. Because obviously all my questions were at first, obviously I can't see the meter so that would have put my mind at ease." (M3, In-home interview, Family, Vulnerable, C2DE)*

## 5.5 On-street communications

In terms of other methods of engaging with customers, the lamppost signs heralding installation were frequently mentioned quite spontaneously and seemed to have made some impact. However, the Mobile Exhibition Unit and Customer Information Points were only very occasionally noted and rarely used. At least one customer said they had specifically looked for such a unit in order to ask questions but to no avail. Few encounters were reported with the Customer Service Team.

*"Or if that supposed information site that 'will be in your area' was a bit more prominent and a bit more visible and a bit more findable, that may have been full of useful information, showing films all over the place, I don't know. As I said, I couldn't find it. I may have looked in the wrong place, it may have been around somewhere but it certainly wasn't readily available to me." (M2 Focus group)*

## 5.5.1 Lamp-post signs



The pink water droplet signs that were flipped to reveal their blue reverse side at installation were mentioned spontaneously on a number of occasions although not everybody noticed the change in colour and wording on the signs, seeing them as mainly about telling residents that metering would be with them soon. While it was noted by one customer that there was a space to write in the date of installation (*sic*), this was not completed; another noted that something was written in but it was ‘fuzzy’ and illegible. For the most part, they were viewed positively; they made some impact and customers could track the progress of the installation through a neighbourhood.

*“Yes we noticed them. I didn't particularly read them, I just thought they were to do with the water, we knew it was coming. I quite liked seeing it around because I thought it emphasised it, there was a bit of a build-up locally, people saying ‘we have had our meter, have you had yours?’ So I think having the signs up was quite helpful really.” (M3 Telephone interview, Family, ABC1)*

*“From my experience, it was really clear because they put notices up all up and down the road on the lamp posts to say that it was coming in bright pink letters. We also got notices put through the door as well.” (M4 Telephone interview, Family)*

However, it was noted that they were not on every street, that because they were often in place for some time they might become damaged and torn off by the poor weather, and for those who were driving, they were not easy to read.

*“There were blue ones on about every 4th/5th lamp post, it said something like, ‘Water meters being installed’ or ‘Water Board work’, something like that. A bit flimsy, after a day they were all bending, but from what I remember, you knew exactly what was going on.” (M3 Telephone interview, Post-family, Vulnerable, C2DE)*

On an odd occasion, they caused a little surprise because they appeared in advance of distribution of the first information packs or very quickly after.

*“We were really shocked weren’t we, that it was going to be absolutely so imminent, they said next three weeks didn’t they, at the time?...”*

*...We feel a bit like we’ve been forced. I mean obviously, we have no input in that at all, do we? We’ve just been told.... You feel like we live in a nanny state now and we are told what we can do when we have to do it, we’ve got no choice in the matter.” (M2 In-home interview, Family, ABC1)*

Overall, they were seen as a useful means of communication but something of a lost opportunity to inform customers about the date of installation<sup>1</sup> and the location of the information point.

### 5.5.2 Information from the customer service team



On a small number of occasions, customers had had a member of the team come to their door and hand them the information pack although it was not always clear whether this was before installation or at that time. In a few interviews it seemed the teams were making an effort to talk to customers while others thought they were simply posting the information through letter boxes.

*“And I saw him go down the road and he had a whole wad of them and he was literally just making sure people weren’t just popping them through the door so they were going out of their way to try and make a point and be customer facing with everybody.” (M2 In-home interview, Family, ABC1)*

It was also sometimes unclear whether customers might have mistaken the installer for a member of the customer service team or whether there was some confusion with the contractors delivering the Home Saver Checks because a few customers talked of the customer service team offering advice about saving water.

*“He put a couple of water bags in our loos because we have a large overflow so that cut it down a bit. He advised us on a few things. Generally it was perfectly*

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<sup>1</sup> We understand that Southern Water were advised by the police not to include the date of installation in case it led to con men trying to gain access to customers’ houses posing as contractors.

*amicable, no problem at all...He was very efficient, I thought.” (M4 Telephone interview, Vulnerable)*

Where a member of the team was recalled prior to installation, the sort of messages that were picked up were that someone would come to see them about where the meter might be fitted and that for the first three months *‘there would be no charge’* as Southern Water just wanted to see how much water they were using.

### 5.5.3 Information points – Mobile Exhibition Unit (pre-installation) and Customer Information Point (post-installation)



While noticed by a few customers, these had been rarely used; one customer had enquired whether his lead pipes would be changed as part of the installation process; a woman had asked about compensation for her shower being broken by the interruption in the water supply during installation. In neither case did the customers feel those manning the unit were helpful on account of being told that Southern Water could not help.

*“I tried to do on the vans that were parked various places and they didn’t really want to know. They were a little bit ‘Well, it’s one of those things that’s happened’. The fact that I had to pay to have a new shower put in didn’t seem to worry them.” (M3 In-home interview, Vulnerable, C2DE)*

The approach of staff on different units may have varied if the following reports are accurate; for one customer, the unit seemed to be a token gesture while for another, it was highly effective.

*“It was kind of like, ‘let’s park this out here, no-one’s going to come past but on the off-chance someone’s going to come by and pop in, we’ve ticked the boxes.’ That’s what I felt about it. There wasn’t a concerted effort on their part to come and see people’s views and explain the reasons behind it... apart from profiteering of course...I don’t feel they provided enough, they did enough to tick the boxes, but you had to go out of your way to get that information.” (M4 Telephone interview, Family)*

*“The people that were outside, there were two guys and two women, they were more than helpful just to let whatever questions we had, they were willing to chat as well.” (M3 In-home interview, Family, ABC1)*

When customers who had not seen them were told about the units, there was support for the opportunity to talk to someone from Southern Water face to face and a number thought they might like to have taken advantage of it. However, there was an expectation that they would not be available outside working hours which meant that many customers could not do so.

## 5.6 Contacting Southern Water

Where customers had felt they needed to contact Southern Water to request further information, they tended to do so via the telephone helpline.

### 5.6.1 Helpline

At each milestone, there were a number of customers who had contacted Southern Water using the helpline number. There were very few instances of customers having to contact Southern Water more than once; usually this was where a problem needed sorting rather than a query. The nature of the queries understandably changed over the course of the customer journey.

At M1, about 4% of customers (n=200) said they had contacted Southern Water about compulsory metering. At M2 and M3, any contact seemed to be about concerns around the size of future bills, and at M3 specifically, issues with the meter installation.

Concerns about the potential size of bills were not only expressed by larger families but also by small households (in one case concerned about 'going back to war time living').

The impression given by those customers who had contacted Southern Water with a concern about their future metered bill was that they were told there would be a 'period of adjustment' to the new charges. In some cases they might be advised that their bill was likely to rise but not in all cases where it was realistic to assume that it might.

There was little sense that customers came away with a plan of action or specific advice although they might have been reassured by messages such as 'wait and see' or 'carry on as you are', or by the prospect of there being potential sources of help.

***“So do you know what that process is and how it works and whether you've got to do anything?”***

*No. We've just got to do exactly how we've been doing sort of thing. I pay every week...*

*...Yeah cause you rang them up, didn't you?*

*... Yeah and they said to still continue doing that, that's not a problem. The lady I spoke to on the phone also said that you won't go onto the meter straightaway. Although its on 0 and from that time it will be up, you won't get charged how many units you use. Not straightaway.*

### **So when are they going to start charging?**

*I think it's a gradual process. As far as I'm aware over the next 18 months...but gradually and then I imagine after that you'll be on the meter and you'll get charged for what you use...*

*...I'm dreading it." (M3 In-home interview, Post-family, ABC1)*

From M4, the contacts changed to being more about billing, including the size of bills (forecast and actual), methods of paying and help that might be available with paying bills. These issues are picked up again in the next chapter (6. Bills, billing and support).

*"So I rang them and spoke to a very nice young lady and explained that I live alone, I'm quite careful with water and have a water butt in the garden. She said 'you really are paying too much then, let me look into it...' and she did. I got a letter then and it had gone down considerably. So I was quite pleased with that." (M4 Telephone interview, Vulnerable)*

A customer had called Southern Water about whether his higher than expected bill, was correct.

*"Yes but got stock and not very convincing responses from Southern Water. Never achieved a sound answer as to how an average family now pays double – rather than less, as was used in the justification." (M6 Qualboard, Family)*

One of the customers involved in the in-home interviews at M6 should by the time of the interview, have received her second metered bill but she and her husband were still receiving unmetered bills (along with their neighbours) and attempts to find out why, had left them frustrated and confused. She had tried to get through to the helpline without success and then written a letter instead; however, a phone call some time later from Southern Water, followed by a letter, had failed to clarify the situation.

*"I ended up writing a letter saying roughly what I just told you. And I waited, I think it was a good few weeks for a reply; I had a man phone me saying that he was upset to think I hadn't been able to speak to anybody on the phone. And he tried to explain to me what was going on. He couldn't understand this. I said, 'that says to me, I haven't got a meter but I've got one installed. He didn't understand, he said 'oh you might find you're in credit'. .. Then I had a letter a couple of weeks after that, telling me something completely different but I don't know where that letter is, I'm sorry. So I was just totally confused so I thought, 'okay I'll carry on paying what they want me to pay and I'll carry on till next month' when I get another one of these [unmetered bills]. (M6 In-home interview, Retired, C2DE)*

The main reasons given by customers who had **not** made contact with Southern Water before and around meter installation were that they felt they had been given a lot of information and any questions they had were probably addressed in this (this was especially the case if they had not read it). Some were also sceptical about whether the company could advise them at all. For example, on the issue of opting into metered billing from the point of installation, it was questioned whether, since the company had no data on their usage levels, it was in a position to help (it was suggested by another customer that they should be able to provide information based on statistics across customers). Others, worried about their future bills, felt their concerns (about having a meter) could not be addressed by Southern Water so there seemed little point in contacting them.

A number of customers were dismissive of helplines in general, both in terms of accessing them (the cost, ease of getting through to speak to someone) and in terms of the quality of the response (it depended on who you spoke to).

*“No, after reading the pack there was nothing further I wanted to know or understand.” (M2 Qualboard, Post-family)*

*“At the end of the day we had enough information. The choice to look at it is down to us. They gave us what we needed.” (M3 telephone interview, Family, ABC1)*

*“It was a bit vague really, wasn't it? Well they sent out the leaflets and it was up to us to read it, obviously. I've had my hands full, so I just get on with day to day business and accept that the water meter is here to stay. I can't see how the water board could have done any more really. I think they've done what was expected of them, it was up to me to read it.” (M3 telephone interview, Post-family, C2DE)*

*“Actually, I suppose I should ring up and find out but I hate ringing call centres because it depends who you get, whether you get the right answer or not to be perfectly honest.” (M2 In-home interview, Retired, ABC1)*

## 5.6.2 Website

While there was some awareness that the address of the Southern Water website had been included in the information, only one or two customers had consulted it. One woman said that her husband had tried to find information on the website when they first heard about the programme (through word of mouth) and had been unable to find out what they wanted to know. This was about when and where the installation was taking

place and what the metered tariff would be so that they could judge how they would be affected.

Customers who took part in the M2 focus group as non-internet users found the number of references in the information to the internet and YouTube frustrating as they did not know if they were 'missing out' on useful details.



## 6 Bills, billing and support

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### 6.1 Introduction and key findings

- In this section, issues around billing are covered including the perceived affordability of bills, understanding of transitional arrangements for moving on to metered charging, understanding of bills and areas where greater clarity is needed.
- While as might be expected, larger households were more likely to expect and see an increase in their bill, this was not always the case; some families were hoping to see a reduction in their bill especially if they had had contact with Southern Water. With the arrival of their first bill, while it was mainly families who saw an increase (some of whom were disappointed by this), there were also smaller households who had previously lived in houses with low rateable value who saw their bill rise.
- For the majority (but not all customers), their water bill was one of the more affordable bills although a number were keen to point out that in current economic times, this did not necessarily make them easy to afford and a proportion were concerned about paying their water bill if it was to rise significantly. While some hoped that Southern Water might be able to help them pay, others doubted if they would qualify, and thought they would have to look at finding ways to save water (although some were unsure how they might do this).
- Customers frequently had some understanding that the process of moving onto metered charging was a gradual one that would give them time to get used to it. Many had some appreciation that this involved a delay before their meter reading counted towards their bill and some knew something of the changeover tariff; however, the detail of both of these was often hazy and sometimes incorrect. The option of being charged according to meter readings from the point of installation was not always known and if known, customers were uncertain how to decide about this.
- Sources of information about these mechanisms included the booklets, the 'forecast bill' and helpline staff, but many customers had not gained a clear picture of the process from these. The sample included a number of customers who had opted for the changeover tariff.
- Many of those who recalled receiving a 'forecast bill' found it useful as a guide to their water consumption and likely bill; a number were surprised by the amount of water they were using.
- Levels of engagement with bills seemed lower as customers focused on the amount they had to pay. Some suggested that bills could be simplified to show essential information. Information comparing water consumption with that of various sizes of household had often been referred to and some felt this had misled them into thinking that if their household's use was below average, then their bill should be lower or about the same.
- Other factors that obscured what the size of bills would eventually be (and might give an unmerited sense of reassurance) included credits transferred from unmetered bills and changes to direct debits around the time of 'switch on'.
- Prior to receiving their first bill, many customers were unsure about the arrangements for paying their bills and whether things would continue as under the old system. Most

were already paying by direct debit.

- There was a lack of awareness of specific schemes for customers requiring support in paying their bills and when such customers had contacted the helpline about this in advance of getting their bills, they tended to be given general information about what might be available and eligibility, and told to come back once they had received their bill and found they had difficulty paying it.
- Arrangements for billing during the move to metered charging was an area where many customers experienced much confusion. In addition to wanting an idea of their metered bill as soon as possible, they identified a number of other points on which clarification was needed.

## 6.2 The effect of metering on bills

### Expectations before billing

The survey at M1 showed that a third of respondents (n=200) thought that their water bill would increase (a fifth felt it would increase 'by a lot'); a little less than a third expected a decrease and the same number did not know what to expect.

Unsurprisingly, perceptions of how having a water meter would impact on bills was associated with household size. More than two in three respondents in a household with one or two people thought their bill would come down, including 50% of those living alone. By comparison, almost two in three (63%) of those living in a household with five or more people thought their bill would increase, including over half (53%) who thought their bill would go up a lot.

The findings from the qualitative research strands largely supported this finding with many larger households expecting an increase e.g. a family of four expecting to see their bill rise to £700 from £500, and many one and two person households expecting their bill to go down. However, as with the M1 survey, the picture was not clear-cut; in the face of the unknown, some smaller households feared a rise/ thought they would pay about the same (e.g. a retired man living alone who thought his bill would remain about the same because of the additional cost of 'hiring the meter') and some larger households hoped to pay the same or even to pay less. It was noticeable that where family customers had had dealings with Southern Water, either through the helpline or

visits for the Home Saver Check<sup>2</sup>, they sometimes had expectations of lower bills providing they followed advice to save water.

*“I was a little bit against it because I didn’t know whether it was going to save me money or not but now I’ve heard stuff about it, the guy’s been round, I’ve spoken to the guy from Southern Water and what have you, I’m all for it. I think it’s alright.*

***Do you expect your water and sewerage bill to go up, down or stay the same and why do you think this?***

*I’m expecting it to go down initially, purely because I’ve told the boys about saving water, the ways we do stuff, we have showers every day we don’t stand there for as long and stuff like that. I think it will go down.” (M3 In-home interview, Family, ABC1)*

In contrast, a few who needed to use more water for a disabled family member were very concerned about the potential increase in their bill. A customer who had spoken to the helpline and then had a home visit, had been told that he could see a four-fold increase.

*“We had a gentleman come round and he discussed the whys and wherefores. I was rather shocked actually, he gave us an estimate of what our bill should be. We usually pay about £40 a month. He looked at it and estimated, based on how much water we use bathing our handicapped daughter and so on, that it might end up being as much as £170 a month. It was a shock.” (M3 telephone interview, Retired, ABC1)*

### Experience after billing

Once the first bills were received, while it was mainly family households that saw an increase, it seemed not to be confined to these. Moreover, some of the smaller families who lived in properties with a lower rateable value were surprised at the increase especially as they sometimes felt they had been led to believe that all customers could save by going onto metered charging.

*“It has been a bad experience for us as our bill has more than doubled.” (M5 Qualboard, Family)*

*“The whole advertising campaign they brought in was misleading because they said that you will save money, it will be cheaper for most families. It is not cheaper for families. It’s only cheaper for single people and couples but for families, it’s just a blatant rip-off.” (M6 In-home interview, Family, C2DE)*

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<sup>2</sup> These are in fact provided by a sub-contractor although customers see them as from Southern Water

## 6.3 Perceived affordability of water bills

### Before billing

The survey at M1 showed that half of respondents (n = 200) agreed that they found water/ sewerage charges affordable, with a further quarter disagreeing or strongly disagreeing with this. This picture was borne out in the qualitative findings; the majority of those who were being charged according to rateable value seemed to find current bill levels affordable, while there were a few who were very unhappy (for example, water could exceed fuel costs).

*“Nothing’s affordable at the moment, the way things are. So it works out mine is about £45 pound a month that I pay, which for the amount of water we use is disgusting.*

***So what are you sort of comparing that with to make you feel that it’s...***

*Well I’m paying more in water bills than what I’m paying for my electric.” (M2, In-home interview, Retired, C2DE)*

Those customers on lower incomes were, unsurprisingly, less likely to think their water bill affordable.

The M1 survey showed that of the third of the sample (n=67) who expected their bill to increase, nearly half thought they might struggle to pay or would be unable to afford it while two-fifths felt that they would find it harder to pay but would manage to do so. The qualitative findings suggested that while families were often most concerned, smaller households also sometimes worried about affordability; the state of their financial circumstances being a key factor in this.

In the qualitative research, customers were asked what they might do if they found their bills rising significantly; some of those without affordability issues were sanguine about a possible increase in their bill and accepted that they would have to pay it. Those who were concerned about their ability to pay were either hopeful that some help might be available from Southern Water or sceptical about the company’s ability to help because they were not on benefits.

*“I would love Southern Water to be able to help me but how do you go about that sort of thing, I don’t know. I mean, I am not a scrounger, we live off our pension and this is it.” (M3 Telephone interview, Retired, Vulnerable, C2DE)*

*“I’ll write and complain... I very much doubt that Southern Water will be able to help. They’ll just say, ‘tough luck, this is the new system, that’s what you are going to pay’. Again, the consumer has no choice.” (M3 telephone interview, Family, ABC1)*

Some thought they would need to try and cut their water usage, however, some were unsure how this might be achieved.

*“We will try and cut down if we can, I don’t know how. You still have to do your washing and jobs. You could put a brick in the cisterns, I suppose.” (M3 Telephone interview, Family, C2DE)*

*“Use less water! – take shorter showers, shallower baths, use short flush on the toilet whenever possible.” (M2 Qualboard, Retired)*

For those who expected that their bills would stay the same or decrease in size, the assumption was that a higher bill might signal a leak or something amiss with the meter which they would want Southern Water to investigate, especially if it was a significant increase. The idea of changing their behaviour to use less water tended to be a secondary consideration although one that they would have to consider if the meter was working correctly and there was no leak.

*“I would certainly contact Southern Water because I would be concerned, because I am fairly certain/adamant that it should go down. I would be questioning the integrity of the meter or leaks or things like that. I am very confident that the bill should certainly not be higher and it ought to be lower. I would expect them to come out and check the meter - I don’t know pressure test or whatever, I would, because I know my water usage is not high. I would assume that there would have to be a fault somewhere in the system and I would expect them to fix it, or if they thought it was something we were responsible for and they weren’t going to fix it, I would at least expect them to tell me it was there responsibility.” (M3 Telephone interview, Family, ABC1)*

### Experience after billing

Those whose water bill had gone down obviously found them more affordable and some questioned why they had not opted to have a meter before.

*“Originally I thought ‘oh my God, this means we’re going to be paying a lot more than we did originally’. But we have found that it’s significantly cheaper than we had before...I’ve often said, ‘why on earth did we not have it done before?’” (M6 In-home interview, Post-family, ABC1)*

After their second bill, many families, some of whom had seen their bill double, were concerned that their bill was less affordable; they worried about how they would manage when the changeover tariff came to an end.

*“Definitely less easy to afford. Like most of the UK, we are struggling with our finances at the moment and having to pay so much more for water doesn’t help... I would have accepted a small increase as an incentive to save water but not a 100% price hike... predictably, we were all ripped off.” (M6 Qualboard, Family)*

*“No it’s harder to afford and will only get worse as the real pricing structures kick in... I should think it is highly unlikely that many households will pay less under the metering system as it seems impossible to decrease our usage without installing costly e.g. grey water recycling systems.” (M6 Qualboard, Family)*

However, there were some households who felt that despite the increase, their bill was still affordable.

## 6.4 Transitional arrangements and the changeover tariff

### 6.4.1 Understanding pre-/at installation

As noted at 5.3.1, many customers picked up from the first information pack that they were being ‘eased into’ the new method of charging and took much comfort from this, seeing it as giving them time to adjust to having a meter and higher bills. However, they were unclear on the detail of what was involved and were aware that their knowledge was hazy. In fact, several customers seemed to have misunderstood what was involved. Their understanding at this early stage of the process of moving onto metered charging is summarised below.

#### **‘Switching on’ of the meter**

Most customers at M2 and M3 were aware that they were not being charged on the basis of their meter reading from the point of installation; however, not all were aware that the interval before metered charging was three months.

*“I think I read somewhere that said it is not going to be activated for some time and then they will take a reading but to be honest, it was hard to see exactly what they were doing.” (M3 Telephone interview, Post-family, ABC1)*

A couple of customers seemed to assume that the first three months of being on a meter was ‘free’ i.e. they did not appreciate they were still being charged according to the old rateable value system.

*“Yes, I believe it is that after the first three months of not paying anything, it is then three months at a reduced rate to sort of ease us into it a little bit at a time, because we are one of those households that will struggle with the new system.” (M3 Telephone interview, Retired, ABC1)*

*“My assumption is for three months there is no charge and then I am expecting to see a bill with some kind of reading and the changed amount coming through.”  
(M3 Telephone interview, Post-family, ABC1)*

One customer felt that the ‘free’ period was something they had paid for previously under the old system as it happened to coincide with the two month payment ‘holiday’.

*“I was a bit bemused that they said we get three months before they charge us to see what our usage is, but our next few months are free anyway because we pay every 10 months. I think we’re being a bit hoodwinked here because I’m not getting three months free. I think we get a bill at the end of a quarter, don’t we?”  
(M2 In-home interview, Family, ABC1)*

Some customers were aware that they could opt to be charged according to the meter reading as soon as it was installed but they were unsure how to decide whether it was in their interests to do so. Others preferred to wait to see if there were any problems with their meter or to see what their usage was. A number of customers expected there to be further communications from Southern Water, possibly someone to get in touch with them, to help them decide on these matters.

### **‘Forecast bill’**

Few customers at M2 and M3 were aware that they would be receiving a forecast of their bill although the quote below is from one of the exceptions.

*“I think it is about three months after they have fitted it, they give you a forecast anyway or whatever they call it so that should be any day now. I think the meter is activated but like I said they do two to three months of monitoring it and then they tell you what sort of usage you are doing and whether you are using too much or whether you are about right for a two person family - I believe. I am in the dark really as far as that goes.” (M3 telephone interview, Post-family, C2DE)*

Once reminded about the ‘forecast bill’, there was some recall that perhaps this had been in the information provided but some felt that they would like to have a clearer picture of this earlier.

### **Arrival of the first bill**

Few could say when they expected to receive the first bill – the date of three months after fitting of the meter was sometimes cited (confusing it with the ‘switch on’) but also some suggested it would be at the start of the financial year. Customers often seemed to select a month up to which they had paid under the old method of charging.

***“When do you think you're going to get your first bill that's based on metering?”***

*I don't know to be honest. I should imagine in April when the new sort of financial year starts, then we should get a bill set out for the year which is how it usually works...*

*... We could ring them and ask them...*

*... Yeah. But I would imagine it would be in April when the new bills come in.”*  
(M3 In-home interview, Post-family, ABC1)

When they discovered that it would be nine months after installation before they got their first bill, this caused some consternation.

*“Okay, which would be a huge shock. For these people who are not aware like myself, at this stage, they could be receiving a bill in six months, well nine months, that is extortionate compared to what they currently are paying, or on the other hand it could be slightly less... Yeah, that worries me quite a lot, that's a long period of time of going without knowing what those values on those meters means in money terms, and where you stand.”* (M2 In-home interview, Pre-family, ABC1)

## **Changeover tariff**

The changeover tariff was rarely known by name although customers sometimes recognised it when prompted; given that there is little about the tariff in the first information booklet and some customers had not read the second, this is perhaps not surprising. While customers had some understanding that it would help keep their bill at a lower level, they tended to be unaware of the mechanism for doing this and often made incorrect or incomplete assumptions about it.

*“Is that the bit that comes after the three month grace kind of thing, yes I have. Basically, what I understand is that you get three month grace and then there is a period where you are given a bit of a leeway if the usage is high.”* (M3 Telephone interview, Post-family, ABC1)

*“I think I read something that said about they'd let you get used to it or something, and it's not until after the third reading or something that they actually charge you for what it should be, so whether that means they're going to say actually, this is what you should be paying this month, so you have like three prompts until you actually then pay on the fourth, I'm not sure, but that's how I interpreted it. They're going to ease you in.”* (M2 In-home interview, Pre-family, ABC1)



## 6.4.2 Recall and understanding post-installation

Here, we look at customers' knowledge once they had their meter 'switched on' and received their 'forecast bill' based on their first three months water use; some customers had also received the first bill and some the second.

### 'Switching on' of the meter



Many recalled the letter informing them of their meter becoming active and this was often expected based on their earlier reading, although for those who had assumed their meter was switched on at installation, it was something of a surprise.

*"Well, I expected it because when they put the meter in, I remembered something about having to look out for it." (M4 Telephone interview, Vulnerable)*

*"I think I was a bit surprised, but pleased they told me...I think it just took me by surprise that they told me it was switched on...I thought it was going to be switched on straightaway." (M4 Telephone interview, Post-family)*

The mention in the letter (and in the second information booklet) that they should expect a 'forecast' bill in three months seemed to have rarely been picked up however.

## 'Forecast bill'



Many of those at milestones 4, 5 and 6 recalled receiving this especially, if they had had a home visit and it had been mentioned as part of this. The forecast seemed to be very helpful in giving customers an idea of what their bill would be and enabling them to think about the effect of any water saving efforts they had made to date. Those now expecting a lower bill were obviously very pleased.

*"We were definitely looking forward to the point when we could see all this hype about putting in water meters is all going to save us money and all the rest of it, yeah we was looking forward to that, and that was quite encouraging when it turned out to be so." (M4 Telephone interview, Vulnerable)*

*"It's interesting to see, because you can see how it's going to go up I suppose, if that makes sense, and it makes you prepare for it rather than 'here's your bill and this is how much you've now got to pay'." (M4 Telephone interview, Vulnerable)*

*"Well actually I thought it was less. I was expecting it, I was quite worried about how much it would go up by but at the moment, like the letter says on the first reading, it looks like it's going to be an extra £60 and obviously if it changes over time, they will adjust the figure again." (M4 Telephone interview, Family)*

Views differed in terms of how clear customers found the information in the forecast but most seemed to be able to identify the essential information.

*"I found it quite difficult actually because you had to read the whole lot before you could find out how much it is costing you....I think it should have all been on the first page, like an account. Amount used, how much it costs right in front of your nose so you know and don't need to read all the other stuff. ..Then they give an annual estimate of how much it would cost based on your consumption so far. The information was there, but it was difficult to winkle it all out. That's how I feel about it." (M4 Telephone interview, Vulnerable)*

Some commented that it made them aware of how much water they were using (in particular compared to average daily consumption), with some customers so surprised that they had then compared their consumption with neighbours.

*"I think as well, I was a little bit surprised at how much water we used in an average day, I think about 320 litres, which considering we're quite careful to turn off the tap when we're cleaning our teeth and doing all the things we should do, I certainly didn't have any conception of how much water is going down the plug hole." (M4 Telephone interview, Family)*

*"Oh yes, I remember that! That was a bit frightening. 750 litres a day or so. We're using about half as much again as their average." (M4 Telephone interview, Vulnerable)*

*"Very useful...Because we use a lot more water than I thought we did and we need to do even more to save water. We compared it with friends and neighbours, as you can imagine. We still seem to use a lot of water." (M4 Telephone interview, Family)*

*"I think I compared my letter with a neighbour's letter... she'd come above average as well." (M4 Telephone interview, Post-family)*

A customer discovered that she had a leak as a result of a very high forecast and wished that a reading had been taken earlier; another customer that she had been sent a forecast for the wrong meter (again, she checked because the meter readings did not tally).

*"I think I would have been happier if they picked the leak up sooner so if I hadn't have had to wait all that time not knowing there was a leak. So if perhaps when they installed them, if they'd read the meters perhaps sooner rather than waiting for six months or so, I think that could have been picked up. Because in the road that I know, next door, they had a very bad leak, their bill's £1000 something. The man over the road and his was twice, he's had the leak twice." (M5 In-home interview, Family, ABC1)*

## 6.5 Changeover tariff

Here, we look at understanding of, and response to, the changeover tariff in a little more detail. As noted at 6.4.1, customers often had only a vague understanding and often had the wrong idea about it. Even those who had rung the helpline concerned about a possible increase in their bill and been told about the tariff had little detailed recall of it shortly afterwards. It was sometimes assumed that bills would be held at the level of the previous bill for a time or capped at this level, rather than reduced from the new level. In one case, a customer suggested that from what he had read, Southern Water would be paying people to switch to a meter.

*"There's going to be a payment, by the way it reads, there's going to be a payment to every person that turns over, when they turn onto the water meter. I can't believe that myself, I can't believe they'd turn around and pay people because they're switching over to meters." (M2 In-home interview, Retired, C2DE)*

*“I picked up on the changeover tariff. I think I’m getting confused now actually because I thought it would be one of the options at the end of the three months, it would give you a reading and let’s say it was more than what you were paying on a monthly basis, and then there would be some sort of credit on that. That was one of the options. There were three options altogether but I found it sort of confusing as to which one would be best for me. And I found the language wasn’t very clear... but that was my understanding. And then you could regulate what you wanted at the end of the three months having had that initial reading. That was part of the changeover.” (M2 Focus group)*

Not surprisingly, a few were very pleased about the tariff based on their skewed understanding.

*“That’s probably what I understand is some period of grace of some sort but I skimmed that in the initial pack, I can’t recall the details to be honest. I know I was left with the impression that I wouldn’t have a higher bill during that period even if we’d used more water, so either if the meter reading was lower, I think we would be paying a lower amount, but if the bill was higher because of the meter then we would pay the old figure. It seems exceptionally generous to be honest. Private companies usually do nothing but grab. I am sure they are being driven to do that by Ofwat the water regulator, I am sure they are being encouraged to do that rather than being generous. It seems fair enough.” (M3 Telephone interview, Family, ABC1)*

*“Well it says in there, doesn’t it, three months, but if you do the changeover tariff then you can hold off for the two years so if you take that, obviously it’s not going to go up, hopefully it’s not going to go up but it will take the two years for you to get used to it anyway... Yes, so you know your bill’s going to be the same roughly for the next two years.” (M2 In-home interview, Family, Vulnerable, C2DE)*

In the M2 focus group, the participants tried to interpret the information provided in the first information booklet about the tariff but it seemed that in doing so, they confused it with the decision to opt into metered billing from the point of installation. It seemed very difficult for customers to decide whether they would be better off opting for one or neither of the options put before them.

*“The only thing I’ve noticed – ‘this means that if your metered bill is higher than your old bill we will reduce your bill for the first two years, and you do not have to pay the difference’. Does that mean then, at the end of the day we’re not going to pay anything more than we should’ve paid?..*

*... For the first two years...*

***Did anybody else notice that?***

*... Yes...*

*... Well that was the point that I made. I remembered two years from somewhere. It obviously gives you a chance to develop good habits. If your bill would’ve been more...*

... Because obviously that's the worry, that we're going to get a massive bill...

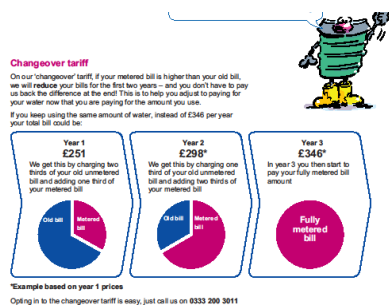
... so it doesn't matter, we don't need to worry about ringing them up and saying 'oh we'll go on to the meter readings now right away' because they'll look at that and they'll be adjusted, have I understood that correctly?"

"I don't really understand it. It says here 'you can request to switch to metered charges when your meter is installed but please be aware that this means you will not be entitled to opt into our changeover tariff'. It's all a bit, you know, I don't class myself as a fool but I'm finding it all a bit hard to follow." (M2 Focus group)

"I think because it's not clear in the beginning, people are not actually fully understanding about their bills. It's an easy option for them to say we're going to reduce it because actually we don't even know what the figures are going to be to start with. They're not trying to pull the wool over our eyes but they're trying to make out obviously that they're doing us a favour when actually we don't know if they're doing us a favour yet because we haven't received our bills so I would be very, I wouldn't take any notice of that, to be honest." (M3 Telephone interview, Family, ABC1)

The mechanism for going on to the tariff was another point of uncertainty with some thinking that they had just a three month window in which to decide if they wanted to opt into it and others thinking that it would be applied to everyone's bills. The customer quoted below had only found out later that customers with higher bills would not be automatically put on to the tariff.

"There's nowhere on there that says you have to ring up. They put a number on there and automatically presume you're going to ring them up... The question should have been, 'if you want this to happen to you and save yourself £20 or £30 a month, ring up', but they didn't say that. So they're blatantly ripping off the larger families who didn't read the booklet." (M6 In-home interview, Family, C2DE)



The information provided about the tariff on the 'forecast bill' was confusing for some customers including how the amounts shown across the pie charts related to the direct debit that they paid. A couple of customers felt that the information provided about the changeover tariff gave the impression that the transition takes place over three years

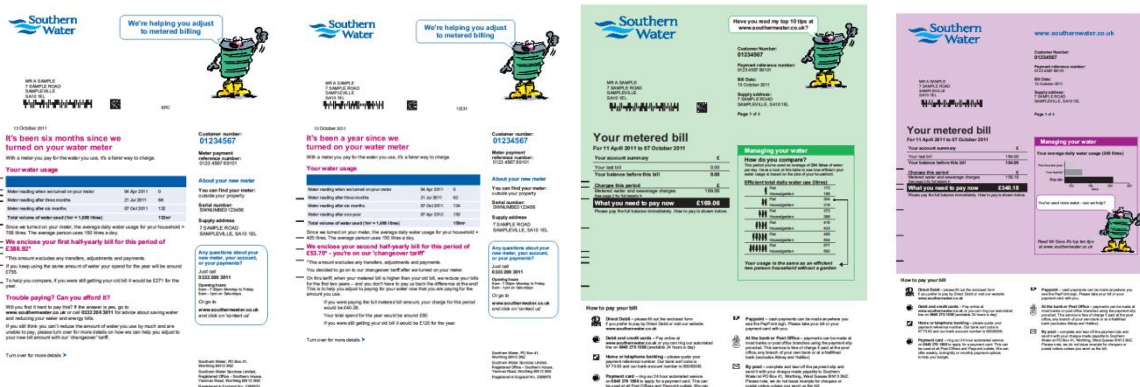
and this was seen as misleading because it is just two years before the customer is on fully metered charging.

*“I explained to them [neighbours] - ‘they’re on the number, phone the number and you can change it – there’s a changeover tariff’. People didn’t understand although it seemed quite clear on the actual thing. But even I had to read it three or four times before I could completely understand what they were getting at.” (M4 Telephone interview)*

*“Yes, this is the one with the pie charts on the back? It just confused the life out of me... I consider myself an intelligent human being. It was all this about the switching over in terms of the bill. I didn’t come away thinking ‘right, I understand that’. I was confused about the timescale it was going to take. In fact for me there was such a saving of going on the meter that I phoned them up and went fully [metered]... I just pay the metered bill now.” (M4 Telephone interview, Post-family)*

There were a few mentions of opting into the changeover tariff among family respondents with higher bills including one customer at M6 who thought they had been put onto the tariff without asking. Another had been able to opt in after paying their first bill because they had not understood the need to opt in and were indignant that this had not been made clear. Occasionally, a customer felt their bill had not risen sufficiently to make opting in worthwhile or that they would rather keep their billing simple and just pay what they owed.

## 6.6 Bills and letters



Overall, few customers seemed to pay much attention to their bill or its accompanying letter unless they were not as expected i.e. they thought the bill was too high.

*“Because I must have read this and said, you know, ‘that is how much I’m going to be charged’. Oh I don’t know. I just don’t really look at my letters, I just look at*

*what I've got to pay and just pay it, unless it's really extortionate, then I query it.” (M5 In-home interview, Post-family, ABC1)*

Many felt that the bills and letters looked clear and could be understood (especially if the sum owed had come down) but others felt that the amount of information could be simplified and reduced to focus on the essentials e.g. water used, cost, reduction from changeover tariff, the total amount due.

*“Too much information, a little overwhelming and busy. The relevant information – amount used and cost – could be made clearer and simpler to see.” (M6 Qualboard, Family)*

While generally, the style of bills was seen as friendly looking (and an improvement for a few on bills received from other utilities), some were of the opinion that getting the content right was more critical. The ‘dustbin’ motif was also dismissed by a number of customers as rather silly (though clearly memorable!).

*“I think sometimes when you look at these bills, you think, 'I don't really know what that is'... Because sometimes you think, 'that's double dutch to me', same as with gas.*

***What specifically, do you find hard to get your head round?***

*Everything, like the volume of water returned to the sewer, what's that...53...the previous reading, the current reading...total volume of water used = 53.0...so what's the square? I don't even know what that means!*

***Is it cubic metres?***

*Cubic metres? m3 is that what that means?” (M6 In-home interview, Retired, C2DE)*

*“Cartoony friendly face... that's all I can remember, all I can remember is that stupid dustbin.” (M4 Telephone interview)*

The comparison of the bill with different household sizes stood out and was perceived by many to be the most useful piece of additional information on the bill. However, as some noted, it did not help predict the size of the bill and some felt it could actually be misleading; some customers expected that if their consumption was below the average for their size of household, then they could expect their bill not to rise. Some also found it inaccurate.

*“It says our usage is the same as a one person household with a garden, which it's not because I used 241 litres a day...”*

*... Yeah, told us on the front page there. On that side...*

*... Oh yeah, right. 241 litres. And somebody with a house and a garden is 188. So that's 60 more, 60 litres a day more which is a third of that, so we're using a third more. But there are two of us. We're hardly an efficient one person household if we're using a third more." (M5 In-home interview, Post-family, C2DE)*

*"And we're sort of like how we are, we're average. We are average so...so that was good, it's nice to know that we weren't abusing it, if you like, abusing the recommendations and guidelines if you like. I see it more like a recommendation. I get told off if I don't stay below it. I get penalised..."*

*... Well if you stay within those guidelines and they've got their calculations or estimates that's there for a four people house, then we should be alright." (M6 In-home interview, Family, C2DE)*

*"If I am an average or below average user, then why has my bill doubled?" (M6 Qualboard, Family)*

Many of the customers in the sample had found their account in credit when they moved over to metered billing and this sometimes made comparisons between their previous and new bill difficult. If they were paying by direct debit, this could also obscure the underlying amount of their bill. These circumstances seemed to make it difficult for them to get a clear picture of what their new bill was and what they might need to pay in the future once the credit had been used up.

*"There was a bit of a mix up because our meter wasn't working to start with. We kept going out there to try and see how much we were actually using. So it wasn't working, it just kept staying at 0 and we thought 'oh this would be nice'. It's got to catch up eventually! So it would have been April 2012. And we had a bill in May and then we had another one in August. But we carried on paying with direct debit, just carrying on but, you know, the same as what we were paying on the normal water rates but we're actually in credit so at the moment we seem to have been using less than they'd anticipated so it's alright at the moment." (M6 In-home interview, Family, C2DE)*

The 'purple' bill signalling that a household had used more than 20% more water than in the previous billable period had not been received by any customers at M6. If they received such a bill at some point, their expectation was that it would evoke surprise and make them suspect a leak or other problem – they did not anticipate that it might signal a sudden increase in their water use. While the idea of bringing the change to customers' attention was viewed positively, some were unsure if the different colour was sufficient to alert customers and felt that something stronger was needed.

*"You're not going to know, are you? You're just going to think 'oh that's a pretty colour'."*



**So what do you think they need to do to kind of make people sit up and take notice?**

*Well, they need to put something on the top of the page or in the middle if it's folded. As you unfold it or take it out of the envelope, there needs to be something in red." (M5 In-home interview, Post-family, C2DE)*

## 6.7 Arrangements for billing

Many customers, prior to receiving their first bill, were unsure of the arrangements for billing and payment and posed many questions about it; for example,

- Will they receive monthly/ six monthly bills?

*"I'm not even sure how you're going be charged. Is it going to be from the beginning of January until the end of January then your bill's going to come in for January?" (M2 In-home interview, Pre-family, ABC1)*

- Will their direct debit be adjusted monthly to reflect consumption?
- Will they continue paying as presently e.g. consistent amounts by direct debit spread over 10 months or weekly by putting money onto a card? If so, how will this be worked out?

*"I expect like most people, I pay on a monthly direct debit, 10 months a year, you know. If it's £380 it's £38 a month. If they're going to send me a half yearly water bill, it's not very clear. It does mention about continuing with monthly payments, but are they going to send me that and say 'in that case we estimate your annual figure will be £x and we're going to start charging you so much a month from now'? That's not clear as to how...what I don't want, I expect like most people, I pay most of my bills monthly, is because I don't have to worry about the winter gas bill or the summer electric bill or whatever. It's a nice, easy feeling to know exactly where I stand. What I don't want is in six months' time to get a letter from the water board saying, 'you owe us £400 or £420'..."*

*... I think that's what we're all worried about...*

*... Yeah exactly. I mean, I'm hoping that in the long term, because there's only two of us in our house, that it will go down. But I don't know and I won't know till I start getting the bill. As I said, I might get the first bill and say 'that's alright' or I might go 'oh my god!'" (M2 Focus group)*

- What happens if, under the old system, you have paid six months in advance and you switch to metered billing in this period or during your two months direct debit 'holiday'?

*"Well as I say, only about those people that have the February/March off, how does that affect them because if they're going to start... It says here they will*

*start calculating from the time the meter goes in so will they spread that cost again over the 10 months or what will they do, I don't know...*

*...Well, the thing is, that's what I don't know how they sort it out because this February and March...*

### **Are your holiday months?**

*... Yes and I rely on that money and if they're going to start metering me, if it's going to be paid quarterly then at the end of the quarter which will be April, I'm going to be stuffed basically." (M2 In-home interview, Retired, ABC1)*

*"I don't know what happens to the half year we've already paid because we paid that obviously in advance. It's paid from October last year to April this year and then you pay the other half April to October you see." (M3 In-home interview, Retired, C2DE)*

- What happens if your bill goes down and you are in credit – is money returned to you?

The timing and content of information about direct debits appeared to cause some confusion and might have led to some complacency about the need to be careful with water use because customers assumed that the change in direct debit after 'switch on' would be reflective of their bill. A couple of customers picked up that the new direct debit was for 12 rather than 10 months and felt that Southern Water had not been open about this.

*"I think at the time - I see it as 'your next payment of £41.16 is due'...I thought 'oh that's good because previously it was £49'. But only recently did I look at it again and see that it had gone from ten monthly instalments to 12 monthly instalments. So actually it probably hasn't gone down by that much. At the time I just saw the number and saw that it was a lesser payment than it was before." (M4 Telephone interview, Family)*

In terms of customers who chose to switch to paying by direct debit as a result of metering, in fact the majority of respondents seemed to be paying by direct debit already. There was one mention at M4 of a retired customer who had switched to paying by direct debit and one customer who was on a payment plan to clear arrears.

*"Because we are not on any benefits there is nothing else we could do, just pay slowly. Instead of paying every six months, we can pay monthly so we do not have to pay that big amount in one go." (M4 Telephone interview, Retired)*

## **6.8 Other forms of financial support for customers**

There was little informed knowledge of ways in which Southern Water might be able to help customers struggling to pay their bills. A few customers picked up in the first

information booklet that there was something about support being available and a few had made enquiries on their own behalf about any help they could draw upon.

More generally, a number of customers expressed hope that support would be available for larger families, disabled people and those who needed help, with the proviso that this did not give them licence to waste water.

*“I think there is a responsibility in Southern’s approach to ensure people who are more vulnerable are able to afford their water.” (M2 Qualboard, Post-family)*

*“I guess the only thing would be for very large families or where there are particular needs, medical needs. I can’t think of one at the moment but that sort of thing, then I would expect or hope there to be favourable consideration of cost in those circumstances, but they should still be encouraged not to waste any water.” (M3 Telephone interview, Family, ABC1)*

*“I think it’s yes, a fairer way. However I think there should be some sort of reduction per child. But then you’re going back to like the Poll Tax age where it’s like per head, isn’t it? But then you’ve also got the ones who’ve got more medical needs as well. You know, there should be a leeway for discounts for like, your medical needs. You know, smaller children.” (M6 In-home interview, Family, C2DE)*

A number were dismissive of help being available for their household either as a result of enquiries they had made or the assumption that help was only available for those on benefits.

Some of the more vulnerable customers were pleased that they might be helped and a few had at least been somewhat reassured by the response of Southern Water. The customer anticipating a possible fourfold bill increase had been told that he might be able to get help from a charity.

*“There will be nothing I can do. I will just have to pay it ... I was told to ring up if it was too difficult. They mentioned something about putting me onto this charity to see whether there is any extra income that can be used to pay it. I believe there is assistance for those who can’t afford it. I was told to contact them in extreme circumstances.” (M3 Telephone interview, Retired, ABC1)*

A customer, with a chronic skin condition also received a positive response from Southern Water.

*“So I asked them how this would affect me. Their guy said, ‘when it actually comes to being charged for it, they’ll see what your first bill is and then cap you back to your last bill because of your medical condition. And we’ll get a doctor to examine you.’” (M4 Telephone interview, Vulnerable)*

Similarly, a woman concerned about a likely bill increase was pleased that there might be schemes to help those who are struggling; she was told to call again once her bill came in.

*“I did feel slightly reassured when I came off the phone like I wasn’t just getting this water meter and my bills were going to go up by however much, that was tough. I did feel the woman on the phone was very helpful.” (M3 Telephone interview, Family, Vulnerable, C2DE)*

However, the experience of others who had looked into getting help suggested that the process might not be straightforward. For example, a customer who looked after several adults with learning disabilities in her home and who was very concerned about the increase in her bill (£200 so far), was unwilling to put each of them through an assessment in order to prove that she deserved to be helped.

*“Yes, I wasn’t happy because I thought blimey; well that’s not what the words I used, I swore but yeah. So yeah. I did phone the water company up to see if they could - if I could get a percentage off, you know, because of the people who live here and that and they said no.*

**Okay, and on what basis wouldn’t they let you do that?**

*They just said no, we don’t have the facilities to give you a discount. But then my boss tells me differently so... she’s going to look into it for me, get a percentage off – just like 10, 20 per cent of your bill or something.*

**Right. I mean there is something called WaterSure, which is – it’s where, I think if you’ve got – it’s usually within the family, a dependant who has some disability that needs help to...**

*Yes, they sent me this paperwork but they had to have a letter from the doctor to say what was wrong with them, so – and I thought that was invasion of privacy and confidentiality stuff so I didn’t fill it out.” (M5 In-home interview, Post-family, ABC1)*

Another vulnerable customer had contacted Southern Water after receiving his ‘forecast bill’ and becoming worried. The customer described how the member of staff “seemed to know what I wanted to do, but it didn’t happen”. He had spoken to several people before getting the information he needed through a Home Saver Check.

*“There’s so many schemes and I’ve been on the phone so many times I get a bit confused. What I’m saying is they could make it a bit easier.” (M4 Telephone interview, Vulnerable)*

When the availability of a social tariff was generally raised with customers, while some accepted that part of what they paid supported a social tariff, others felt it unfair especially if they were concerned about facing higher bills themselves.

## 6.9 Information/ clarity required

It is in the area of the financial arrangements around billing that much of the confusion lies for customers and where greater clarity is required. Customers often spontaneously identified the information they required and at other times, the discussion led them to conclude that they needed more/clearer information on specific topics. There was a keen desire to have an idea of the effect of metering on one's bill earlier than six months after installation.

*"Yeah, if you had a bit or prior warning that your bill, when the meter does kick in, is going to go up. But we don't know now, we've got no idea.*

*We don't and everyone says 'when these meters go in it's going to be terrible' but they don't know because...*

*... Most people just assume that your bills going to go up." (M3 In-home interview, Post-family, ABC1)*

We have brought the requests for more information together below.

### Pre-receipt of bill

- How to interpret the meter readings i.e. working out one's likely bill from the number of units used

*"So they're only going to be taking whole cubic meters that you use. Now cubic meter is obviously a meter, by a meter, by a meter, but if you're a family who all have baths three times a day or something, and lots of washing machines going, a cubic metre's not going to go very far. But if you're just a couple of people like we are and you are in a house, a cubic metre's quite a lot. But again, are they going to charge 50p for a cubic metre or £50, we don't know." (M2 Focus group)*

*"I haven't even got an idea how the reading will come out, so say for example, say the figure's 542 that shows on my meter, what does that mean in monetary terms. Are we going to be told that information?"*

#### **Would you like to know that?**

*Yeah, of course, because if I'm going to make a conscious effort to see whether I'm using too much water, or actually is my current standard of living sufficient that my bills aren't going to go up, well we might just save a couple of pound or pence, you know so yeah, that would be interesting to know. And to make that*

*decision of 'oh, do I continue my direct debit or' – yeah, that side of it." (M2 In-home interview, Pre-family, ABC1)*

*"They send us all through these things they're going to do but they don't say how much they're going to charge. Now if they was to come up and say we're fitting a water meter in, this is going to be fifty pound per square thousand litres, which is what they're coming through with, well that's more expensive, so they've got to come up with a price that they're going to charge per thousand litres, because they say the average person uses in the region of three thousand six hundred litres a day, that's with their baths, their washing..." (M2 In-home interview, Retired, C2DE)*

- How water usage relates to other elements of the bill including sewerage, as well as the standing charges

*"That's the thing; it doesn't actually give any indication of how much you will be paying. Because obviously there are three basic things. At the moment you've got your water cost, the sewage and drain water costs – which I don't think is going to change but it's not very clear on that to be honest. Yeah obviously, the amount of water you use they can monitor and meter and give you an exact figure as opposed to a general one based on rateable value, but as I say the sewage and rain water disposal. As I said, is that directly linked to what you get in, i.e. the amount of waste water going out is directly related to what's coming in. or is that again just a general figure and then there's a standing charge. I've got no idea and I mean, I could work out roughly how much water I'm using but I have no idea what they're going to be charging for it. So until they come along with a bill and I either say 'that's alright' or I look at it and go 'oh my god, look at that', I'm not going to know where on earth I am." (M2 Focus group)*

*"I can't afford to pay £40 odd a month – It's just impossible. I'm paying £31 now and that's a struggle. Your water bill used to include everything but as far as I can see on that letter, it's [waste water] not included." (M4 Telephone interview, Vulnerable)*

*"You don't get what you read on the meter, that's my biggest grudge with it all. You should be able to have a way of knowing exactly what you're going to pay." (M4 Telephone interview, Retired)*

- How to estimate one's likely bill, possibly based on the number of people in the household and how they use water
- How one should decide if opting for immediate metered charging is right for you – for example, does Southern Water have customer statistics to draw on that would give a guide?

*"But then we might wish in these three months, if we'd have known it was going to be a lot cheaper, that we'd asked now to be metered instead of being charged..."*

*... Yeah you should have the option...*

... But you don't know because there's no pricing...

... No way of knowing...

... See that's where I got confused, I mentioned it earlier on, is that the option that we're given either to wait three months or to go straightaway and there was...

... You've got no information to make that decision on." (M2 Focus group)

"Like with the billing, you know, till I get my bill I'm guessing. Do I want to switch? I don't know, I haven't got enough information." (M2 Focus group)

"Just that, the point at which you go onto metering was a bit complicated. It's confusing, in the letter, it was a bit confusing. That you could do it now, you could do it later on, or you could do it in your next bill. It wasn't very clear, it was confusing." (M3 Telephone interview, Post-family, C2DE)

- When/how do you need to let Southern Water know that you wish to opt in for immediate metered charging?

"Well mine, as I said, was installed last Friday. Does that mean I couldn't ring them up tomorrow and say 'I've decided to go onto a metered reading' after it's been installed?.. Did I have to ring them Friday or Monday or something? Well in fact it would have to be Monday because it didn't finish 'til six o'clock Friday night... but as I say, the main point is I wouldn't know whether to change because...but if I never found out what the current rates are etc., is it now too late to find out? Again that's not clear." (M2 Focus group)

## Post-receipt of bill

- When and at what level direct debits will be set especially if there is credit to be used up
- Whether it is in your interests to go onto the changeover tariff and what you need to do
- How water is measured; several types of unit ( $m^3$ , litres and the relationship between them) are often not understood

"I don't get all this litres. I don't know what all that is. That just throws me. Just tell me in English." (M5 In-home interview, Family, Vulnerable, C2DE)

- How one is supposed to use the table comparing water use by size of household and does it help you estimate the size of your bill?
- Specific information about the different forms of help that are available and who is eligible for these.

## 7 Effect of metering on water use

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### 7.1 Introduction and key findings

- This section considers how customers used water and the impact of metering on their attitudes and behaviour. It also describes the constraints on customers with respect to conserving water, and in particular, the difficulty of involving other members of the household in their efforts. Finally, it covers customers' response to the information about water saving provided by Southern Water.
- Customers exhibited a broad range of attitudes to water use and behaviour with respect to conserving water. The majority claimed to be taking some actions to cut usage and for many, these pre-dated UMP. Others had taken measures as a result of metering and some anticipated having to do more if their bill increased. Yet others were unsure what else they could do or felt they had done enough and anything else would undermine their lifestyle.
- Among those households who were newer to the idea of conserving water, it was the installation of their meter that seemed to trigger greater awareness of their water use/wastage in some and prompted them to be more careful. However, others were waiting for their first bill (or 'forecast bill') to see if it was necessary to take any or take further action. Indeed, the 'forecast bill' had alerted some customers to the need to cut their use if they wished to control their bill. For those who had seen an increase in their first/second bill, some were disappointed that their efforts had not had the hoped for effect on keeping their bill down.
- While many customers earlier in their metering journey were of the opinion that they would still be careful about their use of water even if their bill was lower than previously, there were a few signs that a lower than expected 'forecast bill' had led some customers to become a little more relaxed.
- Most households claimed to be doing simpler and well publicised actions such as not letting water run when brushing teeth or only filling the kettle to the required level or showering rather than having baths, while fewer customers were taking a larger number of measures including some that were more demanding.
- It was clear that for some customers there were a number of obstacles to conserving water including, persuading other members of the household to adopt such behaviours, perceived shortcomings in technology, the financial constraints of buying more water efficient appliances (including a shower for some), guidance on measures that would have greatest impact, lifestyle choices and the need to break old habits. There were signs in larger households that bill payers were making an effort to encourage children/partners etc. to be mindful of their use of water, with mixed results. However, those with disabled members in their household often found it difficult to make changes.
- Customers were generally very aware of the availability of water saving tips from Southern Water and other sources and how these had been around for a long time. While a few customers were still unaware of devices such as 'hippos', many wanted ideas that went beyond what they saw as well known and largely common sense.
- Several customers had had a Home Saver Check and they had generally found these very useful for the guidance they provided on how to save water and sometimes, the reassurance they gave about their levels of use and likely impact on their bill.



## 7.2 Perceived use of water

At each stage of the metering journey, customers were asked about their use of water and whether they had changed their use as a result of metering or whether their patterns of use had been laid down previously. Across the research, we found customers who claimed:

- always to have taken care with their use of water; this was sometimes seen as a ‘generational thing’ relating to their upbringing or a result of experiences living overseas, working on ships/boats, camping – often, circumstances in which water is in short supply

*“I don’t clean cars and I don’t water the garden. We started getting plants that don’t need a lot of watering, things like that, that like the dry. So long gone are the busy lizzies... See my generation were brought up by parents that went through the war, so all of those things were what you did anyway.” (M2 In-home interview, Retired, ABC1)*

- to have taken some measures as a result of metering and were aware that they might need to do more (especially if they found their bill excessive)

*“The kids will put a towel on their hair, have a bath, one round here, one here and put three straight in the wash, and you think ‘that can be dried and it can go another day or two’. Things like that, just cutting back and trying to save on the washing and cut the baths, showers. Not saying we’ve got to go around smelling but it’s just, ‘have a shower instead of running a full bath’. And the same with the dog. I used to give her a shower with the hosepipe out there in the better weather. I won’t be doing that. That will be cut back and things like that.” (M5 In-home interview, Family, Vulnerable, C2DE)*

The customer quoted below had installed showers and dual flush toilets when metering was first announced, in advance of installation.

*“It’s an investment, isn’t it? You’re investing in your own self. It’s like insulating the loft or putting in double-glazing. In the end it’s going to reduce your bills and if you don’t start working on it from day one, it’s too much all at once.” (M6 In-home interview, Family, C2DE)*

- to have taken measures and were now unsure what else they could do (some were concerned about this, especially the families)

*“A lot of water usage was from the shower, we’ve put one of those showerheads on that pulses so it uses less water. We’ve also got an egg-timer in the shower – makes you stay in there five or ten minutes, no longer. Some of the water in the sink downstairs is retained in the bowl and used for watering plants.” (M4 Telephone interview, Family)*

*“As I say, turning the tap off when we’re cleaning our teeth but there’s no way I could cut my washing down because it’s a full load every time so it’s not as though I’m just putting a few bits in to do a wash so basically that’s really all I can think of and perhaps, which I’ll probably hate, is leaving my washing-up bowl full that bit longer, things like that.” (M2 In-home interview, Family, Vulnerable, C2DE)*

- to be using water as always in the hope that their bill will not rise (hoping they are not profligate; if it does rise, they may need to reconsider)

*“I am already very careful with using water at home so I do not expect the meter to change the way I use water.” (M2 Qualboard, Family)*

*“I think we’ll wait for the first bill to come in on the meter and I’ll consider the action to take from there. Well, we will sit down when we are having dinner one day and say, ‘like I have got the new water bill in and it is a bit higher than necessary, so come on guys, shower instead of bath, you know, just be a bit more vigilant, don’t clean your teeth and let the water run etc.’ We will come across that later.” (M3 Telephone interview, Family, C2DE)*

***“How much do you think about the water at present?”***

*To be honest I don’t, I’m really bad. I normally put the shower on and I’ll leave it running for five minutes without even thinking about it or I leave the tap running and my other half is always saying to me ‘Why have you done that?’ and I don’t even think about it, so I suppose I probably will start thinking about it now.” (M2 In-home interview, Pre-family, ABC1)*

*“We could probably tighten a little bit but it probably wouldn’t be a lot less I wouldn’t have thought...”*

***Do you expect that you might have to consider changing your water usage when the meter’s installed?***

*...I don’t want to have to...*

*...I think probably most people will carry on as normal...*

*...I don’t want to be a mad lady with a saucepan collecting every drip out of the tap...*

*And then see what your bill comes to.” (M2 In-home interview, Family, ABC1)*

*“Probably but I won’t really know until my bill comes in as to whether I need to make any changes or not. So I don’t think personally that I do waste water.” (M3 In-home interview, Retired, ABC1)*

- to be using water as always and not expecting to change their behaviour as they feel it would impinge on their lifestyle too much – some of these customers may actually regard themselves as careful with water already

*“So I thought, 'oh it's no use going out there and reading it, I'll end up being like...a nervous wreck if you like, that's too much you can't use this, you can't use that. Whatever we use, we use and that's it.” (M6 In-home interview, Retired, C2DE)*

*“I am already very careful with using water at home so I do not expect the meter to change the way I use water.” (M2 Qualboard, Family)*

### 7.3 Attitude to the use of water

Here we look at how attitudes to using water changed over the course of the metering journey, from before the meter was installed, to after it was fitted but in advance of the first bill, to after the first bill.

#### **Before metering**

The survey at M1 indicated that around two in three respondents (64% n =200) felt they were careful about the amount of water they used and around one in four (23%) said they were concerned about wasting water and took steps to reduce their usage. By comparison, around one in seven (14%) said they did not think about how much water they used.

In the qualitative research at M2 (i.e in advance of metering), a large number were also claiming to be careful about how they used water, attributing this to the way they were brought up or their concerns about the environment. They described steps they had been taking for some time. Furthermore, some of the customers interviewed later in the journey looked back at water saving measures they had taken long before metering (such as the use of water butts).

However at this stage, there were also those who used a lot of water. One mother described her use of water thus:

*“I do use a lot of water. I do, I'm excessive. There's probably about six showers a day in my house.” (M2 Focus group)*

In addition, she rinsed off plates before putting them in the dishwasher (with the tap running) and ran the tap before filling the dog's water bowl (because of lead pipes). She recognised that her family would need to change its behaviour and that ideally, they should start doing this from now (she thought her meter may have just been installed but since she had not had a second information pack was uncertain).

While the first information pack seemed to alert customers to think about their use of water, there was little sign that they were making changes because of metering at this point, and of course, for some, it was just a short time before the installation of their meter.

### **After meter installation**

The full range of customers described at 7.2 were found at M3 and M4. A large portion of the sample claimed to be fairly conscientious in their use of water; taking showers more than, or in place of, baths, watering the garden/ cleaning the car with water collected in butts, putting 'hippos' in the toilet cistern and widgets in the shower head, and so on. They often claimed not to have changed their behaviour as a result of metering but to have been using water sensibly for some time.

Several customers stood out as being particularly conscientious and concerned about their use of water, in part because of the effect on their bill, but they said they had always adopted a careful approach.

*"The only thing we do more now is run off the cold water when we're going to have a shower into a jug and use that either to water the plants or with all this bad weather we've had at the moment, we use it to flush the toilet." (M3 Telephone interview, Post-family, C2DE)*

*"I don't like waste. We have what we call our 'drought strategy', where we drain off the bath into watering cans and put that in the water butts. When we shower, we turn off the taps between soaping and rinsing. Turn off the taps when we wash our teeth. We wash up in a bowl and we don't have a dish washer because I think that uses a lot of water. I wait until I have a proper load in the washing. (M3 Telephone interview, Post-family, C2DE)*

Other however, were aware that having a meter installed had made them more conscious of the extent to which they used and wasted water and many described how their mindset was changing.

*"Having a meter, it makes me think a little bit extra and there are just odd places where I, as I said, I perhaps use one less sinkful for let's say, washing. When you do hand washing, I might think I'll do two rinses instead of three and when you clean your teeth, you turn the tap off until you want to run your brush under the water again. It's just little things like that that I now do that I didn't do before." (M3 Telephone interview, Retired, C2DE)*

*"I would run the tap when I cleaned my teeth, I would run the tap and rinse things and I have stopped doing that now. If I want to wash the steps or something I would have just turned the hose on. Now I use the washing up water, little things*

*like that, don't flush the loo so much and don't use the washing machine so often." (M3 Telephone interview, Post-family, C2DE)*

*"It has made me more aware though especially when I'm doing the washing up. Sometimes I leave the tap running instead of letting the sink fill up with water. So things like that, have made me more aware.*

**So have you started doing things differently then?**

*Yeah, sometimes, when I remember. I think it's just good to get in that mindset of not doing that, when you're brushing your teeth you just remember to turn the tap off and things like that." (M3 In-home interview, Family, Vulnerable, C2DE)*

*"We turn the tap off when we clean our teeth which we didn't really do prior to that, we have got a toilet with a saving flush, we take showers rather than baths, and we just had a really lovely freestanding bath installed and I haven't used it because I feel, 'Oh my gosh, this will take so much water to fill', and you look at things so much differently because you think... and I mean, we have got a big garden, and prior to having the water meter installed, we did go and buy two very big water butts and we are using those. But I use a whole water butt just to water the garden for one day, so how many do I have to put all around my garden to water my garden? That was one of the main things on my mind, what am I going to do with my garden if we get a really dry summer?" (M3 Telephone interview, Post-family, C2DE)*

*"I'm always sort of like, I like my baths, it's like 'no I won't have one now. I'll just have a shower in the morning like normal'. So I'm more aware of what we're using and everything like that. Yeah, just makes you more aware." (M6 In-home interview, Family, C2DE)*

While some had made changes to their behaviour in the hope that these would be enough, there was also a sense that many were waiting for their bill to see how drastic their behaviour change needed to be and were still rather half-hearted in their actions. They often hoped that they would not have to change their lifestyle too much. Others were not taking specific measures but felt that their use of water was reasonable and they were not profligate. These customers did not think that they had changed their behaviour as yet as a result of being metered although some thought they might have to if their bill increased.

*"At the moment, until I see that, I won't believe it, so I do realise we've got to save water and obviously there's got to be certain measures put in. However, I think it will more or less kick off perhaps when the first bill starts materialising and people can see what it actually entails really and how much you are using." (M3 Telephone interview, Family, ABC1)*

*"Let's see when we get our bill in..."*

*... Yeah, once the first bill comes in we'll know if we have to make more changes..."*

...Someone said their bill had gone down and I was surprised...

**So you won't do anything too drastic until you get the bill?**

*Yeah. I don't see that we're very wasteful of water. I really don't. But then you'll see when you get your bill in and if you are truly..." (M3 In-home interview, Family, Vulnerable, C2DE)*

Customers often expressed some frustration that they did not yet have an idea of their bill while some of those at M4 had found the 'forecast bill' helpful, either in highlighting that they were using more water than they expected or that they seemed to be doing well. Indeed, some of those who now anticipated a higher bill, said they had put in place further measures to help save water although most claimed that they had already been trying to reduce their use.

*"My partner, when he washes the dishes, he pours them over first before he washes them; so he'd leave the water running to do that. I've told him just to fill the bowl up and do it that way rather than leave it running. We tend to share a bath rather than have separate ones. Not...brush our teeth for as long. Doing a shorter flush on the toilet." (M4 Telephone interview, Vulnerable)*

*"Yes, when my son's here, we've got a big roll top bath and we don't now tend to soak in the bath now. We haven't got a shower, you can't stand up in the bath, but we both just have it quarter full or whatever, because it will take the whole tank otherwise." (M4 Telephone interview, Post-family)*

There were a small number who were aware that they used water more liberally and had not yet changed their behaviour; watering plants in their much loved garden, taking baths as well as showers. Some admitted that their attitude to using water was possibly 'careless' and they might need to improve their approach although they were a little unspecific about how.

*"Probably fairly careless, if I am going to be honest. Knowing that we were going to go on to using a meter, it will do us no harm. We will be more careful as to how we use the water... It makes one think a little bit. It's very difficult to say what we may/may not have changed. It's just the sort of thing where you leave something rinsing for a long time, you just turn on the cold tap and let it go, you would have to think a bit more carefully." (M3 Telephone interview, Retired, ABC1)*

However, there were a small number who also thought they were not making excessive use of water and hoped to be able to carry on as they were without seeing a rise in their bill, feeling that their use was what was reasonable to keep a household healthy. They thought that they might express their anger at Southern Water if they found they had much higher bills.

*“No, not at all. You've still got to have a shower, or bath to keep clean. At the end of the day, we use the water to wash our clothes, wash our plates after eating, and to have a shower or bath, and occasionally during the summer, water the garden, that is it. We are an average family that want to keep clean, keep healthy and just do the normal things that a normal household will do. We do not leave the hose on 24 hours a day to make sure that the grass is green, so the average use of water has not changed since the meter's gone in. So if the bill does go up, I will be very annoyed.” (M3 Telephone interview, Family, ABC1)*

## **After metered billing**

At M5, most of those interviewed were small households who had seen a bill reduction and often put this down in part to water saving measures. Those who had seen increases in their bill had a range of attitudes to their water use; refusal to try and reduce a bill that had doubled because it could be afforded; uncertainty about how to save more water (using less than the average already), planning to cut down their use.

*“I'm paying more than double. The size of the bill won't make me change the way I use water because we still have to wash clothes and bath or shower.” (M5 Qualboard, Family)*

The lady with residents living with her had seen a large increase in her bill and was trying to encourage water saving but had given up on more extreme measures such as flushing the toilet with bath water.

*“I was even keeping the bath water in and flushing the toilet with it, you know having a bucket? So I kept a bucket by the bath, and instead of flushing the toilet so I was using that. Not very nice.”*

**No. So how long did you keep it up for?**

*Uh probably two or three months.” (M5 In-home interview, Post-family, ABC1)*

By M6, some customers were surprised and a little unhappy that their efforts had not led to a reduction in their bill while others seemed to accept that there was not a lot they could do with a family to save water and therefore planned no further changes.

*“I think our house will just continue to use what it needs without trying to be too wasteful.” (M6 Qualboard, Family)*

*“We have cut down as much as we feel we can – the bills remind us to be careful.” (M6 Qualboard, Family)*

Others were persisting with the measures they were taking, although the occasional comment was made that one's efforts could lapse from time to time.

*“I’d be reluctant to clean the drive now because I think that would use an awful lot of water, whereas I’ve done it before.” (M6 In-home interview, Post-family, ABC1)*

*“Yes, with renewed efforts when the bill arrives! It’s not always easy to use less water and sometimes tempting to just get the hose out rather than lug a watering can around.” (M6 Qualboard, Family)*

#### 7.4 Anticipated response to lower bills

Many customers early in the metering journey expected their bills to stay about the same or to be reduced but they said they did not see this as a reason to consume more water; rather a cause to celebrate paying less and using the money in other ways. Indeed, they often felt that having a meter would make them more vigilant regardless of the size of their bill and its affordability and they felt this was a positive step.

*“If the bill goes down we will obviously be happy, but I think at the end of the day, I mean any change in the house we make would be reflected in what we pay, that would give an indication as well when we try different things to save water, we should see an impact... we would just be glad that we are paying less because we are conscious of saving it.” (M3 Telephone interview, Post-family, ABC1)*

*“Now we have started to be more careful with water we will carry on, it’s a habit now. I save water from vegetables, I save water wherever I can, it’s that routine ... when I am washing up, I use a washing bowl and then I go and put it in my water butt.” (M3 Telephone interview, Post-family, C2DE)*

*“No, we’ll use less. The less you use, the less you pay. Even silly things like when I’m cleaning my teeth I turn the tap off now, whereas I used to run it all the time.” (M4 Telephone interview, Vulnerable)*

One of the vulnerable customers felt that while she would be relieved if her bill was lower, she would be sceptical and worried that her next bill would be higher – she would therefore want to keep her consumption in check. The comment was also made rather tellingly, that if, unexpectedly, a bill came down, they would not be letting their children know!

*“Of course I won’t use any more water than I do now . . . I don’t waste it now so why should I in the future?” (M2 Qualboard, Post- family)*

It was interesting that a customer noted that his father’s bill had gone down drastically as a result of metering, only for it to creep up again subsequently – it was unclear whether this was due to his becoming more relaxed about his water usage.

*“I think for the first bit they did see a bit dramatic drop but I think it’s kind of about the same now. Dad was quite happy I remember for about a year.” (M2 In-home interview, Family, ABC1)*



Indeed, a few customers whose bills were expected to fall according to their 'forecast bill', thought that they had become a little more relaxed about the amount of water they used and suspected they might even increase their consumption as a result of their lower new bill.


*"The fact that the bill dropped so much, led me to think 'well I can't be using that much water'...I was conscious of the time I spent in the shower and I was very disciplined about washing using the washing machine. I would only do full loads. I'm being perfectly honest with you now, I am now less disciplined about both of those things. The way I see it, I could use twice as much water and it would still be costing me less money. So what the heck, just get those bits washed, you need them clean so get them washed – even if it's only a quarter of a load, put a mini-load on and don't worry about it. So yeah, it's definitely changed my usage and maybe not in the way that you would want me to." (M4 Telephone interview, Post-family)*

*"The fact it's made a difference to our bill is good, we were thinking we can't get the paddling pool out in the summer, but we're not using huge amounts anyway, so it's not making that much of a difference – we could be more easy going." (M4 Telephone interview, Family)*

## 7.5 Measures taken and anticipated to cut down water use

Throughout the research, numerous ways of saving water were mentioned by customers, either things that they were already doing or things they thought they could do if they needed to do more to save water and cut their bill. They are set out in the table on the next page with those on the left being the easiest and most commonly mentioned actions and those on the right being actions adopted by more dedicated water savers and therefore less often.

**Table 3: Behaviours/ measures taken by customers to cut water consumption**

Most common measures					Least common measures	
More showers than baths	Dual flush toilets/ more efficient white goods	Less rinsing when hand washing clothes	Sorting out dripping taps	Thinking about whether to use paddling pools/ not using them		
Shorter showers, shallower baths	Washing car with bucket/ at the car wash/ not washing car/ washing at unmetered house	Children/ family sharing baths	Installing multiple water butts	Planting plants that need less water		
Full loads in dishwasher/ washing machine	Bowl in sink for washing up	Watering garden using water from butts or watering cans	Using timer in shower	Looking into having rain catcher		
Not letting water run when teeth brushing, cleaning vegetables, rinsing plates		Fitting devices to cut water use; 'hippos', tap aerators, shower widgets	Less/ no hosing down of pavements/ steps/ patios	Investigating using internal well as water supply		
			Collecting wasted cold water for recycling	Washing the dog less		
			Flushing toilets less often	Turning off the shower while using soap/ shampooing		
				Using hand gel after using the toilet		

When customers were thinking about what other measures they could take should their bill increase, they might typically mention some of the less common actions but for the most part, they considered they might do more of the more well known things and do them more conscientiously such as shorter showers, not doing small clothes washes to get them 'out of the way', buying more water butts, not using the hosepipe to clean your car.

*“There is other ways if you think about it. Like with the washing up, as soon as there's a bit of washing up we fill the bowl up whereas really, we're going to have to let it build up a little bit then we'll have to do it, much as you don't like it hanging about.” (M3 In-home interview, Family, Vulnerable, C2DE)*

*“Using a watering can and not a hose for the garden and a bucket for the car things like that, don’t leave taps running.” (M2 Qualboard, Family)*

*“I will be more conscious, take steps to keep it at a minimum.” (M2 Qualboard, Post-family)*

However, others were unsure what other measures they could take.

*“I have always been careful. I mean, water is essential, isn’t it? I mean in the last five to ten years I have looked at the adverts and things and always tried to conserve water. Silly little things like switching the tap off, turning it off when cleaning your teeth, using waste water from the bath, trying to use waste water in the garden and other things like that. So I would say I am at least 75 % there already, you know what I mean? ... I can’t think of anything I could do that I don’t already do before.” (M3 Telephone interview, Post-family, C2DE)*

Many customers had little idea of which measures would result in the greatest savings and indeed, it was this sort of information that they wanted. In the absence of this, some spoke of how they were investigating the impact of different measures themselves or how they planned to monitor the effect of these.

*“When I had a shower the other day I actually put the plug in to see how much water I used and it was less than I’d use for a bath, so I’ll just stick to the shower. Because I’d heard some people saying showers used more water than baths.” (M3 In-home interview, Family, Vulnerable, C2DE)*

*“What I shall do is when it’s up and running, I shall keep account of whether we’ve had a shower and whatever and like I pay monthly, so I will then try and work out how much we’re using to what it’s costing so we get a rough idea of what we’re going to be using and how much... see at the moment, you’ve got a bill and you pay so much a month then you know where you are, but with the water meters, you’re not going to know what you use until the bill comes in and that’s going to be, could be a downfall for a lot of people.” (M3 In-home interview, Vulnerable, C2DE)*

## 7.6 Barriers to saving water

A major obstacle to cutting a household’s use of water was the sometime difficulty of carrying other members along in making efforts to save water. This is covered in detail at 7.7. However, customers felt that there were other obstacles preventing them adopting certain measures. We have grouped these according to a number of themes.

### Technology

- the lower volume flush on toilets provided by installing a ‘hippo’ is not always sufficient to remove waste, meaning that it has to be flushed more than once

*“We tried to use one in the toilet but we felt it to be unhygienic.” (M6 Qualboard, Retired)*

*“They sent me a water hippo – never asked for it. Threw it away, all modern WC’s have been engineered to use minimal water, use the hippo and you increase the chance of blockage.” (M6 Qualboard, Post-family)*

- the effect of widgets in the showerhead/ aerators in the taps was not always liked and sometimes thought to be damaging

*“Fitted a showerhead aerator but the family disliked the effect it had on the shower water pressure, and after about two months it started leaking in any case, and so was removed.” (M6 Qualboard, Family)*

- the time for hot water to come through the pipes or heat up (e.g. with combi-boilers) meant that water could be wasted waiting for it

*“I think I’m more careful than them two or my wife. She’ll go and turn the shower on and wait a good couple of minutes for it to warm up properly in the bath in the mornings when she gets up to go to work and stuff like that so she’ll leave the shower on and then eventually get in the shower so there’s a bit of waste there.” (M3 In-home interview, Family, ABC1)*

*“And I begrudge every drop of water that goes down the sink while I’m waiting for the boiler to heat the water. If I just want hot water. And I do begrudge every drop that goes down.” (M5 In-home interview, Post-family, C2DE)*

*“Suffer from a dilemma with our boiler. It is a brand new combi... we turned the ‘pre-heat’ function off to save money on gas – but this then means the water needs to run to get hot! So do I save water, or gas?” (M6 Qualboard, Family)*

- the lack of (affordable) technology to help recycle grey water.

## **Information**

- the need to have information about which are more water efficient behaviours e.g. dishwasher vs hand washing of crockery etc.
- and about the levels of consumption of different actions so that customers had an appreciation of which changes would have greatest impact

One suggestion was that it may be helpful to produce a guide outlining what appliances or activities in a person’s household use the most water.

## **Financial**

- to afford the installation of a shower, efficient white goods, a dishwasher

- a customer had looked into using an internal well for their water supply but thought it would take several years to pay for itself

*“We have an internal well in our house which I have tested... it passed all tests so I looked at the costs of a pumped system in the house but it looks like it would take five years at least to recoup the money so I am still undecided.” (M6 Qualboard, Family)*

### **Lifestyle/ necessity**

- there were practices that some customers were simply not willing to give up because to do so would be ‘a step too far’ e.g. dividing their wash into different colour loads, doing the washing up before it piled up, washing sports kit immediately, flushing the toilet after every use, having the occasional deep bath

*“I don’t think I would be able to, other than like leave a load of plates sitting on the side and do one huge wash but as I say, that’s just not possible and that’s not something that I’d even be willing to do.”*

#### **So it’s like lifestyle choices?**

*“Yeah, and it’s like a case of you have dark washing, you put a dark load on.” (M2 In-home interview, Pre-family, ABC1)*

*“But, no I spent what, 27 years in the navy and I showered in there, we didn’t have baths in the navy. So I like the luxury of a bath, I like to...”*

*... He likes to read in the bath...*

*... I like to read, have a cup of tea and a sandwich.” (M5 In-home interview, Post-family, C2DE)*

*“There’s not much I can do when my son and daughter need a bath or a shower after playing football. They need to keep clean. I’m not going to say to them, ‘you’re dirty, but you can’t have a shower’... The attitude towards water isn’t going to change, because the lifestyle is not changing.” (M3 Telephone interview, Family, ABC1)*

*“We’ve got a 9 litre loo cistern instead of a 12, so that saves 3 litres on a flush, but I’m afraid I still full flush and I do waste water there probably... I do like my loo to be clean.” (M6 In-home interview, Family, ABC1)*

- the requirements of particular household members e.g. children to have baths, extra clothes washing for those with medical conditions

*“The kids are young and therefore we have lots of washing to do and they are unable to take a shower but we don’t run deep baths for them. Unfortunately, with a growing family our usage is most likely to increase however careful we are.” (M6 Qualboard, Family)*

## Habit

- It can simply be very difficult to break patterns of water use that have developed over the years such as flushing the toilet unnecessarily and running deep baths (see also 7.7)

*“ And constantly flushing the chain. She’d put a small bit of tissue down the toilet and flush the chain...*

*... Blow her nose put the tissue, flush the chain whereas I would leave it...*

*...You’ve just got to try and make them more aware not to flush the chain.*

### ***Have you tried to do that at all already?***

*Yeah, or saying to them that they don’t need to keep flushing the chain. ‘Unless you’re going to the loo you don’t need to flush the chain’.” (M3 In-home interview, Vulnerable, Family, C2DE)*

## 7.7 Getting the household on side

Bill paying customers were only too aware that it needed a concerted effort from everyone in the house if they were going to have an impact on their bill by saving water. This not only meant their offspring (whether young children, teenagers or adults) but also often their partners, who might be less conscientious than themselves. Many had tried or anticipated trying to encourage/exert pressure on them to do more.

*“I am getting there, I am really moaning at my husband leaving the tap running, and I say, ‘turn the tap off’. My daughter is really good, I say to her ‘be really quick in the shower and don’t stand under there for ages, you know, lapping it up’.” (M3 Telephone interview, Post-family, C2DE)*

A number felt that any attempts on their own part to conserve water were undermined by teenage or grown-up children who did not contribute to the bill and it would only be once they had grown-up/left home that the customer could take serious steps to reduce their water use. Others felt that their children were too young to take in messages about saving water.

*“We all try to cut down but it’s hard as there isn’t a huge amount of opportunity to do so. I keep reminding my three year old to turn off the taps whilst hand washing etc.” (M6 Qualboard, Family)*

*“Well I think with children there’s not much you can save. If it was just me and my wife then there’s certain things you can change. But when you’ve got children it, I mean my youngest is a nightmare in the bathroom.” (M3 In-home interview, Vulnerable, Family, C2DE)*

In one case, a vulnerable customer in rented accommodation only had a bath available and was concerned about the amount of water her children used and their lack of awareness to be more careful.

*“They don’t sort of think. They run a bath because we haven’t got a shower obviously, they’ll run a bath and it will be a massive bath and just little things like that that they don’t think about, so I am concerned about it.” (M3 Telephone interview, Vulnerable, Family, C2DE)*

They were however taking some steps to reduce water use such as sharing baths, turning the tap off when teeth brushing and she was going to ask the landlord to fit a shower (he was reluctant) and a ‘hippo’.

In several households where the family were interviewed in their homes, there were indeed signs that parents were ‘encouraging’ offspring to change their habits and they (sometimes children, sometimes adults) were listening. In some cases, customers thought that their offspring were possibly more conscientious than others in the household especially when it came to smaller measures such as not filling the kettle more than necessary or running water while teeth brushing.

*“They have told me about saving water to save money and all that but that’s about it...”*

*... We told you not to run the tap when you clean your teeth...*

*... Yeah. Sometimes you’ll forget but I don’t, I always switch it off. Until I need it...*

*... She’s probably more conscious than we are really.” (M6 In-home interview, Family, C2DE)*

*“I’ve told them about it, I’ve told them habits must change i.e. leaving the tap on while they’re brushing their teeth and they’ve started to cut that out. We had a guy from Southern Water the other day was telling us about the egg timer he’s got that sticks on the wall. I’ve said to them as soon as they get in and turn the shower on, they turn it up, I think it’s four minutes so as soon as the timer runs out, that’s it, they come out. So they’re starting to adapt and starting to change. They’re getting on alright with the changes...”*

***And what do you think boys about using less water?***

*...Good.” (M3 In-home interview, Family, ABC1)*

***“So what did you tell them?***

*Cut down on the baths because we haven’t got a shower. So we have only got a bath. So everybody has a bath everyday. But we’ve just said, ‘don’t fill it up so much’.” (M3 In-home interview, Post-family, ABC1)*

*“Yes, we’ve spoken to the children. The older one’s not quite so happy but the other one’s fine so we have spoken about it.” (M2 In-home interview, Family, ABC1)*

***“Okay, can I just ask your son? Has it affected you much having a water meter, has it affected you at all?”***

*I wouldn't say it's affected me but mum and dad going 'oh watch the water meter' and 'don't spend too long in the shower'.” (M6 In-home interview, Family, C2DE)*

For those households with members requiring a lot of water for laundry and bathing, the need to save water was a particular concern. In addition, those with learning disabilities/ on the autistic spectrum might be unable to understand the need to avoid wasting water.

*“I’m forever telling everyone to stop running the taps, you know, ‘don’t put so much water in the bath’, so yes it does affect me, I’m constantly nagging everybody.*

***And is that just your partner and daughter or do you get on at your residents as well?***

*My residents as well...One of the ladies, she tends to use the toilet a lot but she doesn’t actually go, she just goes up and flushes the toilet – just a habit of hers. So every time she goes up I say, ‘don’t flush, I’m listening’. But she still does.” (M5 In-home interview, Post-family, ABC1)*

*“Apart from it helping us to persuade our autistic daughter to shower instead of bath, no real differences.” (M5 Qualboard, Post-family)*

One customer was rethinking whether she should continue to take in language students because of their use of water (and energy) that she would be unable to control.

## 7.8 Impact of water saving tips

There was a high level of awareness of Southern Water’s efforts in informing customers about saving water both as part of the metering programme and at other times. Many customers thought information was regularly sent out with bills or communicated in other ways and that in addition to Southern Water’s efforts, there were countless tips, advertisements and articles about the need to save water and how to do it from other sources. None of those interviewed had been on the Southern Water website to look for information about saving water.

*“And not just now, I would say a couple of times a year we get something from them once with the bill and one other communication on stuff that is relevant. We have occasionally picked up on that – ‘toilet miser’, a brick in the toilet that sort of*



*thing and we use that, they tend to send stuff like that a couple of times a year.” (M3 Telephone interview, Family, ABC1)*

*“You get leaflets all the year round, ‘put things in the toilet, have showers instead of baths, don’t do so many washing machine loads’, no they are pretty good, oh and about your leaks, your taps, that sort of thing.” (M3 Telephone interview, Post-family, C2DE)*

*“We have been following water saving tips for many years. The tips from Southern Water only reinforced what we were already doing.” (M5 Qualboard, Post-family)*

It was also felt that most of the common sense measures seem to have been communicated to customers and some struggled to see what else they could do.

*“I think the leaflets that came, they were saying about the different, the flush thing that you put in the toilets and stuff, I think it mentioned it in there so I don’t think there’s a lot more they could sort of say not to use, to be honest.” (M3 Telephone interview, Retired, C2DE)*

*“Helpful only in so much as I basically do quite a lot of what they’ve said anyway, in regards to not leaving taps running, and I’ve installed the toilet and that. So basically that’s the only thing that it has done.” (M2 In-home interview, Retired, C2DE)*

However, while many customers wanted more detailed information such as comparisons between water saving measures, as well as newer ideas, it should not be assumed that all customers were fully up to speed with the more basic actions. For example, in the focus group, one man wanted to know more about ways of restricting the water used in toilet flushing and a woman did not know how a water butt was used.

It was suggested that Southern Water could repeat or come up with new ideas for saving water around the time of the first bill – this would be the most relevant time for people who need to cut their use.

*“If it’s constantly ploughed into you, not to the point where you just want to scream but if every...you know at the start of spring or something like that, if there was an advert on telly just to reiterate to people, ‘get your water butt, don’t leave your hose running when you’re cleaning the car’, just little things. ...*

***Do you think it's important to keep this kind of drip feeding?***

*... Yeah I think so. You can become a bit complacent over it.” (M6 In-home interview, Family, C2DE)*

Another idea was for advice that is geared to children for use in the home or at school, with the aim of helping to bring them on board.

*“It’s useful for adults [water saving tips] but if you were thinking about children, you’re going to have to do something for children that makes it interesting but gives the message of what you should be doing to save water. That’s what they should be doing. Because if I just read out to my girls what I read in that pack, they’d say, ‘dad was being boring.’” (M3 In-home interview, Family, Vulnerable, C2DE)*

## 7.9 Home Saver Check

Given that the Check is only offered to those who it is thought could have difficulty in paying higher water bills, it is not surprising that there was little general awareness of this facility. The majority thought they would not take it up if they were offered it as they could not imagine what else they could be told about how to save water.

*“. . . so didn’t think the time it would involve would be of value. But I think it is great that they are offering them to those who may want to know how they could save.” (M2 Qualboard, Post-family)*

A couple of people thought it might be useful but neither of these were ‘vulnerable’ as defined in this study.

However, several customers had been offered a Check (occasionally by someone at the door) or requested a visit and these received positive reports, with those involved feeling that other customers could benefit from the same face to face approach. The contractor was generally seen as having given them useful information; he had sometimes demonstrated things such as how much water a shower uses compared to a bath and fitted devices such as aerators on taps. On occasion, he had also advised the customer what the family’s water bill might be based on how the family used water, or provided them with the means to do this themselves.

*“A guy came from Southern Water the other night, he came round, really nice bloke. [] I’ve seen water meters before. You can go and have a look at all the numbers and he’s told me what the numbers are. He’s given me a figure to work out. He says you can work out your own water, what the cost will be each week. He’s given me like a formula so he’s been really clear with it all. He said you can work out your own water, how much it should cost you, how you can save water and stuff like that. So yes, I’ve got a good idea.” (M3 In-home interview, Family, ABC1)*

*“When the guy was here, he asked how much we’re paying now and he went through how many showers we had a day, how many times the dishwasher went on, how many times the washing machine went on and he put it all into the calculator and he worked out that basically he thought we were going to be about the same, if not, a little bit less on our monthly outgoings for the water. So I found that quite reassuring that he knew what he was talking about, he knew how much it was going to be and he said, ‘this is worst case scenario, if this is your*

*worst case scenario having this many showers, this many baths, this is how much you'll be paying out but it can come down by doing this, this and this'.* (M3 In-home interview, Family, ABC1)

Family customers had often found what they were told reassuring because they felt that saving water would give them more control of their bill and they thought they were in a position to reduce their bills. They were also told on occasion that they would be receiving lots of information from Southern Water including about ways of paying their bill.

*"So yes, he said there's going to be lots of letters coming and obviously with the cost of the stuff, if it's going to be more, then there's ways of paying as well and stuff like that so he made it really, really clear."* (M3 In-home interview, Family, ABC1)

*"We had a guy come in and he asked us how many baths we have a week and how many showers and this, that and the other. And for a family of four it wasn't as bad as I thought, it was like on average you know, what they say. So it was quite surprising that we were sort of subconsciously doing it without realising. The only thing we haven't got is a water butt. But that's something that we've discussed, we just haven't got round to doing at the moment."* (M6 In-home interview, Family, C2DE)

The vulnerable customer facing a potential fourfold increase in his bill said that he found the visit useful as much for the reassurance given that their appliances were not using excessive amounts of water; it was simply that they needed to use the washing machine several times each day.

*"The gentleman was very helpful. He checked our shower flows to make sure they weren't excessive and things like that, but he said that what with the water butts, we were doing very well anyway... He checked things and said they were not excessive. So even though he was really telling us that we were already doing enough, it was useful."* (M3 Telephone interview, Retired, ABC1)

None of the customers who had had a Home Saver Check seemed to have been offered a benefits entitlement check although we cannot be sure that this was not covered.

## 8 Impact of UMP on wider attitudes

### 8.1 Introduction and key findings

- This last section looks at the impact that compulsory metering had on customers' awareness of, and attitudes to, water shortages and Southern Water. It also considers the lessons that customers' feel should be taken from their experiences of the programme and applied in other water company regions undergoing universal metering.
- There were signs that the metering programme had made many customers more aware of the water shortages in the South-East and the need to make efforts to save water. It also highlighted however, the responsibility of Southern Water to do all it can to take action to save and store water.
- While the metering programme may have raised Southern Water's profile for some customers, the majority did not feel that it had particularly changed their views. Any assessment depended on the level of contact customers had had with the company previously (for most, this was confined to their bill) and their views on how they had personally been affected by the programme. Some were impressed with how Southern Water had handled such a large and complex undertaking while others felt metering had been forced upon them and the company had not been straightforward about the consequences for some customers.
- Customers identified a number of areas in which lessons might be learned for future universal metering programmes. These clustered around the timing and method of communications used, specific information that should be provided, help with bill payments and investment in water efficient products, and the use of 'smart' water meters.

### 8.2 Attitudes to water shortages

In terms of whether becoming metered had led to greater awareness of water shortages in the South East, a good number felt this had happened while others thought they had long known about the problems with water resources.

*"A year ago I would probably have said no, but now I would probably say yes, because I think a little bit more about the environment now than I did a year ago." (M3 Telephone interview, Family, ABC1)*

*"It does show that steps are being taken to ensure that [reliability of supply]. Before I didn't really consider that to be so much the case, I assumed they were but this makes it a bit more public, it makes a little bit more - it puts it out there more." (M3 Telephone interview, Post-family, ABC1)*

*"Well, I didn't realise until they came and fixed the water thing and they gave you leaflets to read, you don't realise what is going on until someone tells you about it." (M3 Telephone interview, Retired, C2DE)*

*"To be honest, regarding the water shortages, watching the Meridian program with the reservoirs drying up, that was a major visual thing, of seeing it a year before. In that aspect, I'm aware of it." (M2 In-home interview, Pre-family, ABC1)*

Many customers expressed the view however that having a meter installed had made them particularly aware of how much water they wasted and how they should change their behaviour.

*“It’s made me more aware of the fact that being in the south of England, we are the ones that are going to, well, in general terms we’re supposed to be warmer down here but the amount of rain that we’ve had, I’m not so sure that we are going to be short of water but we’re more likely to be short of water than the north of the country so people should be aware that we need to save water, yes.” (M3 In-home interview, Retired, ABC1)*

The willingness to accept that customers might need to reconsider how they consumed water was also balanced, and in some cases, outweighed, by the contention that Southern Water needed to play its part; moreover, that if it had done so in the past by creating more storage and fixing leaks faster, then there might not be a need for metering.

*“Don’t ask me, they shouldn’t be building all these new houses should they and they’ve got no reservoirs to fill the water up to supply the houses at the end of the day.” (M4 Telephone interview, Family)*

*“I think the ball’s back in their court for them to save the water with the leaks...They keep saying they’re spending millions to reduce leaks, but I never see it”. (M4 Telephone interview)*

*“I get horrified when I hear about all the leaks and all the wasted water and things like that because they give you all these quotes on the telly and the radio about all this wasted water and you think, there’s you not brushing your teeth and leaving the tap running and there’s gallons.....*

*... I don’t know what they do with the reservoirs in times like this where you’ve got the rain we’ve had, I guess they are storing it somewhere but we don’t know. We just see the reservoir in the summer bone dry and if there are links between counties where one area’s got surplus of water that can be pumped out. I don’t know if that’s the case, if that’s in their future plans or it’s ongoing, I don’t know. You hear of these things but you never actually know the answers to them. I can see it would cost millions to do it but it might be the way forward.” (M2 In-home interview, Family, ABC1)*

### 8.3 Attitudes to Southern Water and the support provided

In the M1 survey, when customers were asked how satisfied they were with the service they received from Southern Water, just over three-quarters (78% n=200) were satisfied, including half (50%) who were very satisfied. At other stages of the customer journey, most found questions about whether their view of Southern Water had been affected by the metering programme rather strange; for most, this was because they thought it difficult to have a view of a company with which they had very few dealings.

Customers tended to start from one of two points; either their main point of contact with Southern Water was and continued to be their bill, and on this basis, they hardly gave the company a thought or, in the case of a number, they had had some dealings with Southern Water about a particular incident or query and how this was resolved coloured their view (in both directions).

*“I haven’t got a bad thing to say about Southern Water but then I haven’t got good things to say because I’ve always paid my way with Southern Water so it’s a case of water has to be paid, so I have to pay it.” (M3 In-home interview, Family, ABC1)*

*“I haven’t got an opinion of them...I never thought about it, they send me the bill and every year they put it up by £20. I just pay it. That was it, I didn’t think of them.” (M4 Telephone interview, Retired)*

Customers’ attitudes towards Southern Water after metering depended in part on the experience of metering and what had happened to their bill. If the installation was handled smoothly, they felt they had been given lots of information and the outcome was a lower bill or one at the same level, then customers tended to feel fairly positive. If they resented the metering programme and the fact that ‘it had been forced upon them’, were fearful of its impact on their bill or had already seen an increase, they tended to be rather or much more negative. As reported elsewhere, some customers were cynical about the information they had been given at the outset and felt that they had been misled by some of the messages so that hoped for reductions in their bills had not materialised.

*“Annoyingly, they did it rather well!” (M5 In-home interview, Post-family, ABC1)*

*“Southern Water have done a reasonable job in coping with the metering changeover.” (M6 Qualboard, Retired)*

*“The metering changeover was seamless...” (M6 Qualboard, Family)*

*“Yes, my view is that they have handled this very well, the information was accessible and engaging and they are trying to make the switch as comfortable as they can.” (M2 Qualboard, Post-family)*

*“I had a fairly neutral view of Southern Water before the metering programme – now it’s a highly negative one...I defy anyone to justify a price hike of 100% on any grounds other than a profit motive...The mixed messages, constant justification (‘this is about saving water’), appalling attitude to trapped customers, and contradictory, misleading or down-right inaccurate information...” (M6 Qualboard, Family)*

*“It has got worse. I feel that they are riding roughshod over customers whilst not doing enough themselves to harvest water.” (M2 Qualboard, Retired)*

Some customers felt that the process had raised the profile of Southern Water to some extent and they knew that they could and would contact Southern Water if they had any questions. The point was made that once the programme is bedded in, it will be important that if problems do arise, for example, with billing, that they are sorted out promptly.

*“Yes, you’re more in touch now you’re on the meter. Any problems, yes, I’m more engaged to phone them than I was before.” (M5 In-home interview, Family, Vulnerable, C2DE)*

*“Previously, I don’t recall receiving anything that said what they do, you just assume they fix leaks.” (M3 telephone interview, Post-family, ABC1)*

Despite a positive outcome for themselves, a number remained negative, disliking private ownership of water services and only seeing the profit motive. By the time of the full year bill, several were feeling that their higher bill was funding Southern Water’s profits and they were putting insufficient investment into securing the water supply themselves.

*“It seems that Southern Water are increasing the price to get more money out of its customers.” (M6 Qualboard, Retired)*

*“It has got to be a complete waste of resources to buy and fit the water meters... water supply has dangerous levels of the contraceptive pill hormones, sewage is flooding into rivers and when I have reported leaks in the street they have taken weeks to fix them. These would have been better uses of the money.” (M6 Qualboard, Post-family)*

Local factors also played a part in attitudes to Southern Water with several customers disapproving of the action taken or not taken by the water company in relation to, a traveller encampment that had ‘damaged the water supply’, the broken promise of a new reservoir, and the introduction of fluoride in the water supply.

*“They showed you a picture of a reservoir and why they’re doing it and all the rest of it. Well, again they are really bad because in the late 70s and early 80s they identified that the area would have to have nine reservoirs in order to be able to meet the water supply about now and they only ever built one, so the other eight went by the board.” (M2 In-home interview, Retired, ABC1)*

One suggestion from those who had gained financially from metering was that Southern Water should have made customers more aware earlier of how much better off they would be on a meter. There was little acknowledgement from these customers that they could have opted to have a meter at any time.

*“I wish I’d have had it years ago because it’s really, really reduced the bill...£15 or £16 a month which is what I’m planning to do now, whereas I was paying £40 a month. That’s a lot of money to me on my own so I would have liked them to have mentioned it, but then I suppose it’s profits, isn’t it?” (M5 In-home interview, Vulnerable)*

## 8.4 Views on what else would help customers

Customers were asked for suggestions for how the metering programme might have been handled better, and for lessons that other water companies might learn to help them in planning their own programmes. These are summarised below.

### Timing and method of communications

- Send customers letters/ information about the metering programme well in advance of installation in order to better prepare them and give them an opportunity to respond.

*“We heard the adverts on the radio and the next thing you know, there’s a knock at the door saying it’s going to happen within the next two or three weeks because it’s just come round really quick... Maybe a newsletter or something, an update every now and then would have been really useful, giving you a bit more of an idea of timescale.” (M2 In-home interview, Family, ABC1)*

*“I can’t remember if they did or they didn’t but if they didn’t, they should have done which would be to send a letter out as soon as they knew that they were going to start the programme to say, ‘as a Southern Water customer, we’re advising you that we are going to be changing the way you pay your water by having a meter fitted’.” (M2 In-home interview, Retired, ABC1)*

- Rather than there being a number of different pieces of communication in the first information pack, this should be ‘kept simple’ and incorporated into one booklet
- There should be some means of checking that customers have received information, that they understand it and that any questions are answered; this could be done by telephone or by the customer service team checking up after installation

*“I think it should be a little bit more than they have done. It’s easy just to post something through the letter box...”*

*... Yeah, the people should’ve got that and we haven’t...*

*... Maybe a phone call or just at random ring a few people up and say ‘look are you aware?’ and if they’re not, then they’d know they need to do more.*



*... Ring a few random numbers, say 'have you had this pack, do you know how it works?' and I should imagine maybe 8 out of 10 people would say they're not really sure." (M3 In-home interview, Post-family, ABC1)*

*"Even if they left a note saying 'we're going to call round on such a date. Can you be in because we'd like to talk to you?' I do think somebody should have knocked and made sure that they saw somebody from the household." (M3 In-home interview, Post-family, C2DE)*

*"I'd have thought they could have been more personal about it, maybe have organised a home visit to explain it and answer any questions, you know? Something a bit more personal." (M4 Telephone interview, Vulnerable)*

- Older people were felt to be in greater need of having the changes explained to them face to face and home visits were envisaged here.

*"There's a lot of old age pensioners, older people up here and if, obviously it's easier for them to be told what's happening and pointed through and walked through the scenarios than just get a pack." (M3 In-home interview, Family, Vulnerable, C2DE)*

*"I think it would have been beneficial to perhaps have somebody when they installed it, perhaps somebody that could reassure maybe a lot of customers, a lot of older people maybe that they might not quite have understood what was going on and I think it might have been beneficial if they had a person in the street as they were doing that street, maybe as an information point rather than having somewhere that you've got to go. It might have been nice to have somebody knock on the door and say 'Any questions, can I reassure you about this, reassure you about that?'*

#### **What do you think people might want reassurance on?**

*I think there's a lot of people, obviously older people, would be thinking about, is it going to cost them more or 'do I have to do anything' or do you come and read the meter, or those sort of things. I think obviously, a lot of older people it might have been odd for them to have a water meter and perhaps didn't understand it." (M3 Telephone interview, Family, ABC1)*

- In order that larger numbers of customers might be addressed face to face, it was proposed by several (often older) customers that meetings should be organised at local schools and other venues to explain what was going to happen and how it would affect customers. Invitations to the event should be distributed.

*"Public meetings to explain to people who weren't sure what was going on, what was going on. Sat down with people who are in dire need, explain capping etc, how long do they cap them for? Explain what happens if they can't pay their bill, do they get their water cut off?" (M4 Telephone interview)*

*"Or even if they went to your local community centre and someone could be there, because people would go. Just say, 'we're going to be here then and*

*everyone can come along and we can explain' and they can hand out their leaflets." (M3 In-home interview, Family, Vulnerable, C2DE)*

*"I think they could've done the same as they did with the dustbins, like when the council decided to go with the big green bins, they held various meetings. We used the school here or the community hall ... and everybody, well not everybody, but 98% of people went. ..*

*... Oh yeah, and I think a lot of the fears that are being pointed out here, not that they're affecting us, but they could've been sorted out before everything was started and held a public meeting...*

*...if they'd held a public meeting, they could've given you the tips to save water at the same time. And if they'd done it with a computer programme it could have been visual and would've hit home more. Rather than depending on us reading the back of the bill...*

*... Not only that, with the people who didn't attend, their friends would've told them about it, more information would've been passed on that way." (M5 In-home interview, Post-family, C2DE)*

- Ensure that staff on the helpline are sufficiently knowledgeable to be able to give advice, understand the sorts of problems customers may be having, and try to help them

*"I don't know if there's enough training for everybody when something like this goes on. To make sure that the people at the other end of the phone who are going to take these calls know what the meter does, why it's been put in and how it is going to help. If they can answer these questions then I think that would be helpful. And that gets passed on to whomever." (M6 In-home interview, Retired, C2DE)*

## **Information before and around installation**

- An estimate of likely bill levels for different household sizes

*"I think they could have advised on the cost of the water and what the costs are going to be before the meter was in just so that you can start to get your head around it ready for when you get your bill through." (M2 In-home interview, Vulnerable, C2DE)*

*"I wonder if they could give people an estimate of what a family of 4, an average family - they always go on on the radio and the telly about Mr and Mrs Average with 2.4 children, maybe they could make a pamphlet to give you that... Especially if you break down the usage for each i.e. like how much a bath will cost you, how much a washing machine, how much a dishwasher to run." (M2 In-home interview, Family, ABC1)*

- A guide on the cost of different types of water use

*“What they could probably do is give an approximate price on I don’t know, how much it would cost to flush your toilet. Or a 45 minute cycle on a washing machine. And if you could give a rough, a little price guide...*

*... With a comparison for what you could do to cut it down...*

*... With ‘water costs this much. A 45 minute wash uses 50 litres of water’. That, if you could do that and then they could go home and say ‘okay then’. But they’d roughly know if their bills were going to go up or not.” (M3 In-home interview, Family, Vulnerable, C2DE)*

- Tailored advice to families about how to save water
- Do not give unrealistic reassurances in communications

*“I think maybe the initial letter, saying it would save you money, was wrong...I think it would probably have been better not to have said that for you to be enthusiastic about it, then when you get the first reading it’s higher. I think maybe it should have just been left.” (M4 Telephone interview, Post-family)*

- More detail about schemes to help those with medical conditions
- Be more definite about the date of installation; it was suggested this could take the form of a postcard or someone calling a couple of days beforehand
- Tell people that it is essential to let water come through before turning on appliances such as power showers after installation

*“I suppose it’s the water and they turned the water off and didn’t advise me that it would come back. Of course now I realise that the pipes drain down and that I should have turned it on and turned the taps on to let the water drain back into the system but I didn’t think of that at the time... or even if somebody knocked on your door and said ‘we’ve done your water meter. Turn your taps on and let your water flow through again.’ Not just turn it off and bugger off.” (M3 In-home interview, Vulnerable, C2DE)*

## **Help with bill payment**

- Greater clarity about when customers will begin to be billed on the basis of a metered supply
- Financial help for large households (not just families with children) based on their ability to pay

*“If you have got a family then there might not be a way of cutting down water. Not everyone can do it. If you’ve got boys and that playing football, then you’ve got to use machines and stuff. So there might be a little bit more leniency with people who’ve got more than three children and things like that. Not necessarily under a*

*certain age but if you've just got children up to 16 or 18. They all do the sports and like to keep clean, maybe a little bit more help with families.” (M3 In-home interview, Post-family, ABC1)*

- Be more proactive in telling customers about the changeover tariff

*“Even if they put something on the end of the local news and they just put like a two minute slot saying about the changeover, ‘if you wish to change over, call this number’... because most people just look and they don't, not everyone reads things what comes through the door. But if you're sitting and watching the telly or the news, that might be a better way of letting people know.” (M3 In-home interview, Post-family, ABC1)*

- Extend the period of the changeover tariff.

### **Help with investment in water saving products**

- Free water butts/ ‘hippos’ etc
- Discounts on showers and their installation for those who only have baths
- Discounts on energy efficient white goods

### **Water meter**

- The possibility of having meters located inside the property so that they can be inspected by the customer more easily, much like ‘smart meters’

*“In some ways, and I know this sounds really...well not lazy, but I mean for the less able, I mean I'm alright, I can go out and I can read my meter. But like the electric monitor that you can visually see indoors, it would be quite nice to have a small monitor that you could read indoors. Because we look at that and think ‘what's being used at the moment? Oh, so and so's in the shower’.” (M6 In-home interview, Family, C2DE)*

## 9 Conclusions and suggested learnings

---

### 9.1 Introduction

In this final section, we set out some conclusions that we would take from the research findings and identify some of the lessons that might be learned for other universal metering programmes. These are intended as ideas for consideration and discussion.

### 9.2 Communications in general

#### 9.2.1 Timing

While the publicity about UMP created by Southern Water in the few months before metering was often picked up by customers, it seemed that it was only once they received the targeted communications in the form of an information pack and letter that customers appreciated that they were about to become part of the programme. Given that installation could then occur a very short time after delivery of this pack, this means that customers often have very little time to adjust to the idea or to respond in any way. This may contribute to the feeling that they are being ‘rail-roaded’ into having a meter.

Consideration could be given to sending a **letter informing them about the metering process perhaps three months** or so in advance of installation; this would give them time to get in touch and might also alert customers to the radio/ press messages so they pick them up more readily.

While the date of installation cannot be tied down too precisely, we suggest there should ideally be **an interval between receiving the first detailed information and installation** – customers need time to read and digest it and to possibly think about and respond to the option of being charged based on meter readings from the point of installation.

If it is feasible, consideration should be given to providing **notice of the exact day/ two day window for installation**, ideally via a door drop.

The interval of six months after installation before customers receive an estimate of their bill in the form of a forecast, is too long for customers not to have any idea of the financial impact of metering on their household. It also causes a great deal of worry for customers (some of whom may actually see reduced bills) and postpones some

households starting to take water saving measures. Consideration needs to be given to **how customers can be given some guidance on their likely bill at an earlier point.**

### 9.2.2 Information packs

The information received by customers prior to installation is critical; they are often keen to find out what metering will mean to them and the research suggests it is more likely to be read or kept for reference. The research also indicates that the information provided at the time of installation (which sometimes was not delivered) is not given the same attention. We propose that it is therefore important that customers are given the **complete picture of the metering journey, as it affects them, prior to installation.**

We appreciate that this may be a lot of information but if set out clearly, using devices such as a timeline showing timescales and very importantly, the decision points for customers (opting into immediate metered charging/ the transitional tariff), we believe this will be more helpful and customers will know that they have **all the essential information they need in this single publication.** Even if they do not read it all in advance of installation, it is likely they will retain the information for later reference if needed (indeed, this could be suggested on the pack).

As suggested in the research, the most important information needs to be given priority and it needs to be broken up into easily digestible blocks with clear titles. The friendly tone of Southern Water's booklets was appreciated by customers and should be maintained but it **should not be overly reassuring** – it needs to speak plainly about bills rising for some customers and how changes in water usage can help keep the increases down (but will be unlikely to remove them).

For those who find the pack daunting, it should **spell out sources of other help** such as a helpline, a visit or other forms of face to face communication (see 9.2.3).

If the information provided prior to installation is the main resource, there should be a need for **less at the point of installation.** We suggest it takes a different format to distinguish it from its predecessor and might simply **spell out in abbreviated form** what the customer can expect to happen from this point and any steps he/she needs to take.

### 9.2.3 Face to face communications

Where tailored advice has been given to customers, largely in the form of a Home Saver Check, this has been highly valued and more generally, many customers identified a need for printed information to be supplemented by personal delivery. We wonder whether the **role of the Customer service team could be enhanced** so that they call at households during the period of installation and check whether they have any questions about the meter and billing. They could also invite customers to inspect their meter and show them how to access it, and using information provided in the information pack prior to installation, help customers who are interested, to arrive at an estimate of their bill. Ideas for water saving could be provided at this point or in a follow-up Home Saver Check style visit.

Should such a programme be too costly, a compromise might be the idea of the **neighbourhood meeting** similar to that which some customers proposed. In this the water company could explain what it is doing and why, could field questions and give examples of the effects of metering on households, and water saving measures. We feel that this would offer advantages over the information units (MEU and CIP) which few seem to have noticed, and which seem to be rather a passive approach to engagement (relying on customers coming to the unit), and one which some customers may find intimidating. In contrast, a neighbourhood meeting to which customers are invited is about reaching out to the community; people can go along with neighbours and it allows people to benefit from the questions asked by others if they lack the confidence to ask them themselves. Given that word of mouth seems to be very powerful, it may not be necessary to talk to everyone to get the message out.

### 9.2.4 Information about what the water company is doing

As is very clear from the findings, customers want to know something of what water companies are doing to conserve water themselves. They often feel their efforts are pointless by comparison and that, with metering, the weight of responsibility seems to lie with the customer rather than the water company. The company needs to **be more specific about the action it is taking to combat leaks, improve infrastructure etc.** rather than talking in vague terms about this.

It should also make the point that efforts by customers to conserve water should mean that less investment may be needed in the future by the companies and therefore this should be reflected in customers' bills. It will be vital that such information is provided at neighbourhood meetings.

### 9.2.5 Helpline

Just one customer reported being unable to get through to the helpline and many were satisfied with the response they received. We cannot comment on the quality of advice given but from some of the comments, it did seem rather non-specific and some customers were unhappy with how their matters were addressed (or not addressed) feeling that they were given 'stock answers' or told to 'wait and see'. We suggest that attention might be given to ensuring that in responding to customers' queries about their future metered bill and paying for this, **helpline personnel are able to provide meaningful advice that gives the customer a realistic picture**. Consideration might also be given to how enquiries about schemes to help those struggling to pay their bills are handled and whether more could be done to allay concerns in advance of the first bill.

### 9.2.6 Website

This seems to be an underused resource at present and on the couple of occasions where it was used, it did not provide the information sought. Many customers are looking for guidance on how to work out their likely bill and the impact on it of different actions so they can get an idea of how they might reduce their bill. It would seem that the **website is one place where such tools might be provided**. We understand that some tools are already available via the website but not easy to find. Ideally it should also provide specific information about the date of installation.

While the website may provide a more sophisticated tool, the same information needs to be accessible for non-internet users.

## 9.3 Installation

### 9.3.1 Trouble-shooting

The system used by Southern Water to install the meters seems to be working well; the majority of installations seem to be trouble free and the workmen customer-friendly. The



minor 'niggles' around the process which are picked up by customers relate to maintaining access to their properties, the impact of supply disruption on their daily lives and making good after installation.

Where more significant problems have arisen, there occasionally seem to have been issues with all parties knowing what is going on and crossed messages sometimes occurring. Consideration could perhaps be given to the systems that are in place to resolve problems and in particular, **how resolution can be accelerated**; should, for example, there be in place a means to ensure ownership of such problems so that the customer has to deal with just one person?

### 9.3.2 Properties that cannot be metered

There seem to be some examples of properties not having meters installed. To avoid resentment, this needs to be **tackled in a timely fashion or customers told what is happening** including what happens in the circumstances that it is not possible to install a meter.

## 9.4 Billing

### 9.4.1 Estimate of bill

Reference has been made at 9.2.1 to the need to enable customers to have **an estimate of their bill as early as possible after installation**. This might initially be based on the size of household and patterns of water consumption; once their meter has been installed, they could be invited to **monitor use and given the means to assess the likely impact on their bill from the meter reading**.

The 'forecast' bill, while not noticed by everyone, was helpful for some in giving an idea of how they compared in terms of the water they use and could still be so, even if some customers have chosen to try and arrive at their own estimate. While we understand that a forecast based on three or four months usage will not give as accurate a picture as one based on six months, could consideration be given to an earlier forecast?

As mentioned above, consideration could be given to whether the **helpline might also usefully provide guidance on whether bills are likely to rise** and enable customers to have a realistic idea of the impact of metering.

## 9.4.2 Transitional tariff and other means of support

While we did not see many customers who had opted for the changeover tariff, it was felt to be helpful for supporting the move to higher bills. However, many customers had a poor understanding of the tariff, some were unsure that it was in their best interest and a few had not taken on board that customers have to opt into the tariff.

To ensure some customers do not lose out, we wonder whether consideration could be given to putting **the tariff in place automatically for those seeing an increase in their bill** of over a certain amount, perhaps, 20%.

**The support that is available for customers who may struggle to pay their bill needs spelling out in greater detail** in pre-installation information to relieve some of the anxiety that is felt among those who may be eligible for help. The question also arises of whether the schemes that are available are sufficient; for example, for larger households on low incomes that keep within certain levels of consumption.

## 9.4.3 Clarification around payments

The findings suggest that customers may find it difficult to assess the impact of metering on their bill if their account is in credit and if they are paying by direct debit. They may also be confused by changes in the amount of their direct debit around the time the meter is 'switched on'. This begs the question whether **the timing of such changes needs to be considered and whether greater and clearer explanation is needed** to help customers understand the likely changes in their bill going forward.

## 9.5 Water saving

### 9.5.1 Communications about water use and savings

The findings have demonstrated the wide range of different measures that customers are taking in their attempts to cut their water consumption and the information provided by Southern Water does not reflect this. While the basic measures are still news to some customers, many are simply not bothering to engage in such information because they expect it to be too obvious and insufficiently helpful.

We suggest that **advice needs to be developed in which customers of different levels of commitment and sophistication can find something useful**. It might give examples of good practice in the kitchen, bathroom, garden etc. and the savings (in

monetary terms rather than litres) that can be made by adopting different actions or installing various devices. A means of enabling customers to **work out how adopting certain measures would impact on their bill** would be ideal so that they can try out various patterns of use that might suit their household.

Customers often comment that the average consumption of 150 litres of water per day sounds a lot and they find it difficult to understand how this is achieved. This could be usefully spelt out, alongside ways in which it could be reduced.

Encouraging members of the household to cut their consumption is clearly a priority and sometimes a challenge and perhaps families might be helped in this. For example, **materials might be provided to local primary schools** in an area being metered so that simple lessons can be passed on about the reasons for metering, what it means for families and how the pupils can help. **Home Saver Checks**, which proved very helpful for some families, might perhaps be 'marketed' **as a means of getting the family on board**.

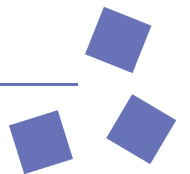
#### 9.5.2 Help with investing in new measures

While discounts on water butts, free 'hippos' etc. are occasionally appreciated, it is the more costly items that prevent some households making significant changes to their water usage. A number of households did not have a shower and many did not have a dishwasher (although some had got rid of theirs). Consideration might be given to the circumstances under which investment in these might work in customers' favour and whether **interest free loans/ discounts** could be offered.

# The Customer Impact of Universal Metering Programmes

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Appendices



# The Customer Impact of Universal Metering Programmes

## Appendices

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Prepared for:

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# 1 Introduction

This document contains the recruitment questionnaires and topic guides that were used in research conducted on behalf of the Consumer Council for Water by Creative Research and Accent Research into the impact of Southern Water’s compulsory metering programme on its customers.

Table 1 sets out the six stages of the research and the research methods used at each stage. Recruitment questionnaires, topic guides and the achieved sample are provided for each of the eleven strands of the research.

**Table 1: Research methods applied to each milestone of the customer journey**

Milestone	Method	Timing
1: Pre-installation/ pre-marketing activity	200 telephone interviews (10 min)	October-November 2012
2: Pre-installation/ marketing activity current	Qualboard (over three days)	January ‘13
	Focus group with offline customers (2 hours)	December ‘12
	10 in-home depths (1 hour)	January ‘13
3: Installation	30 semi-structured telephone interviews (0.5 hours)	October-November 2012
	10 in-home depths (1 hour)	January ‘13
4: Post-installation – preparation for first bill	30 semi-structured telephone interviews (0.5 hours)	December ‘12- January ‘13
5: Post-receipt of first bill	Qualboard (over three days)	February ‘13
	10 in-home depths (1 hour)	Jan-Feb ‘13
6: Post-receipt of second bill	Qualboard (over three days)	February ‘13
	10 in-home depths (1 hour)	Jan-Feb ‘13

## 2 Milestone 1: Pre-installation and pre-targeted marketing

### 2.1 Quantitative survey

#### 2.1.1 Achieved sample

		Hampshire	Kent	Sussex	Totals
<b>SEG</b>	ABC1	37	33	27	97
	C2DE	40	47	16	103
<b>Age</b>	18-34	6	8	10	24
	35-54	37	31	13	81
	55-64	14	19	5	38
	65+	19	21	15	55
	Refusal	1	1		2
<b>Income</b>	Up to £11,999	8	9	9	26
	£12k-£17,999	9	4	5	18
	£18k-£23,999	13	2	5	20
	£24k-£35,999	9	13	6	28
	£36k+	15	14	7	36
	DK/Refusal	23	38	11	72
<b>Total</b>		<b>77</b>	<b>80</b>	<b>43</b>	<b>200</b>



## 2.1.2 Recruitment screener/questionnaire

This is an amended questionnaire following pilot interviews.

### Recruitment

Good morning/afternoon/evening. My name is ..... and I am calling from Accent. We are an independent market research company carrying out research for the Consumer Council for Water, the body that represents water consumers. Please could I speak to the person in your house who is responsible for paying your water bill?

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare a couple of minutes to run through a few questions to check that you are eligible to take part in this research?

Q1. Can you tell me who supplies your water and sewerage service?

Southern Water – both water and sewerage **CONTINUE**

Southern Water – water **CONTINUE**

Southern Water – sewerage **THANK & CLOSE**

Other **THANK & CLOSE**

Don't know **THANK & CLOSE**

Q2. Are you the person in your household who is responsible – either solely or jointly - for paying your household's water and sewerage bill(s)?

1 yes

2 no **THANK & CLOSE**

QM Do you have a water meter?

1 yes **THANK & CLOSE**

2 no

Q3. Do you or any of your close family work or have you worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, market research, Environment Agency or the water sector?

1 yes **THANK & CLOSE**

2 no

Q4. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title?

**IF SELF-EMPLOYED: MANUAL/NON-MANUAL, SKILLED/QUALIFIED OR NOT, NUMBER OF EMPLOYEES**

**IF MANAGER/EXEC: TYPE OF INDUSTRY, NUMBER OF EMPLOYEES AND MANAGEMENT STATUS**

**IF RANK/GRADE (CIVIL SERVANT, NURSING, MILITARY, NAVY, POLICE ETC.) RECORD SPECIFICALLY**

**IF PENSIONERS: ASK IF STATE (GRADE "E") OR PRIVATE PENSION (GRADE ON PREVIOUS OCCUPATION)**

**IF UNEMPLOYED: IF MORE THAN 6 MONTHS (GRADE "E"), IF LESS (GRADE ON PREVIOUS OCCUPATION)**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

1. A

4. C2

2. B

5. DE

3. C1

6. Not stated **THANK & CLOSE**

---

Q5. Which of the following age groups do you fall into?

- |   |       |   |         |
|---|-------|---|---------|
| 1 | 18-34 | 4 | 55 – 64 |
| 2 | 35-40 | 5 | 65+     |
| 3 | 41-54 | 6 | Refused |
- 

Q6. Note Gender

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

### Main Questionnaire

The questionnaire will take about 10 minutes. You do not have to answer any questions you do not wish to and you can terminate the interview at any point.

---

Q7. DELETE

---

Q8. First of all, please can you tell me your attitude to how you use water? **READ OUT**

#### ROTATE ANSWERS

1. I'm careful about the amount of water I use, so I don't waste it
  2. I am concerned about wasting water and take steps to save water
  3. I don't give it any thought and know that I waste water at times
  4. I don't give it any thought and use as much as I need to
- 

Q9. Now, I just want to understand your views about the **water** service you receive. So, on a scale of 1 to 5 where 1 is very satisfied, 2 is fairly satisfied, 3 is neither satisfied nor dissatisfied, 4 is fairly dissatisfied and 5 is very dissatisfied; overall, how satisfied or dissatisfied are you with your water supply?

1. Very satisfied
  2. Fairly satisfied
  3. Neither satisfied nor dissatisfied
  4. Fairly dissatisfied
  5. Very dissatisfied
- 

Q10. And how satisfied or dissatisfied are you overall with the service you receive from Southern Water?

1. Very satisfied
  2. Fairly satisfied
  3. Neither satisfied nor dissatisfied
  4. Fairly dissatisfied
  5. Very dissatisfied
- 

Q11. Have you had any contact with Southern Water in the last 12 months?

- |   |     |    |                     |
|---|-----|----|---------------------|
| 1 | Yes | 2. | No <b>GO TO Q14</b> |
|---|-----|----|---------------------|
- 

Q12. And what was that contact about? **DO NOT READ, MULTICODE**

1. Water metering programme/being made to go on to a meter – **CAPTURE VERBATIM COMMENTS**
2. Enquiry about having a water meter fitted by choice
3. Billing query
4. Water supply problem
5. Sewerage/drains issue
6. Other (specify)

---

Q13. **IF Q12 =1.** And did you get your questions answered?

1 Yes

2. No

---

Q14. How satisfied or dissatisfied are you with the value for money of the water services in your area? **READ OUT**

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied

---

Q15. How much do you agree or disagree that the water and sewerage charges that you pay for are affordable to you? Do you.. **READ OUT**

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree

---

Q16. Moving on, can I ask whether you have heard about the Water Metering Programme that Southern Water is carrying out; by this I mean the programme to install a meter in all homes across their region area by area

1 Yes

2. No **GO TO Q21**

---

Q17. **DELETE**

---

Q18. And where did you see or hear about it? **DO NOT READ, MULTICODE**

1. Local radio – **NOTE WHICH RADIO STATIONS ARE MENTIONED, IF ANY**
2. Local press - **NOTE WHICH NEWSPAPERS ARE MENTIONED, IF ANY**
3. Councillors – **NOTE ANY COUNCILLORS MENTIONED, IF ANY**
4. Community groups – **NOTE WHICH COMMUNITY GROUPS ARE MENTIONED, IF ANY**
5. Friends/family
6. Post Office, library or some other public place (specify)
7. Word of mouth
8. Other (specify)

---

Q19. And can you remember when you heard about it?

1. In the last week
2. In the last fortnight
3. In the last month
4. In the last 2 to 3 months
5. Other (specify)

---

Q20. And how did you react when you first heard about meters being installed across the region? **PROBE FOR REASONS**

1. Good idea generally
2. It will save me money
3. It will help me save water
4. It will stop other people wasting water
5. It means you pay for what you use making it more fair
6. Good for long term water resource benefits
7. If everyone metered, prices will have to go up
8. Could be a problem for people who can't afford to pay higher bills when they become metered
9. No reaction
10. It will stop me wasting water
11. My bill will go up
12. I will have to cut back on what I use
13. I've got a large family, how will I manage
14. Other (specify)
15. Don't know

**GO TO Q23**

---

Q21. **IF Q16 = 2**

**Provide the following explanation of UMP** – You may have seen or heard somewhere that Southern Water is carrying out a five year compulsory water metering programme where it plans to install water meters in households by 2015. At the moment, about 65% of Southern Water's customers now have a water meter and that proportion is increasing each year. Southern Water has installed 250,000 meters to date and will have completed 500,000 installations by 2015.

What do you personally feel about the programme to install water meters in every home, do you think it's a good thing? **Probe for reasons**

1. Good idea - general
2. Good idea - saves me money
3. Good idea – helps me save water
4. Good idea – will stop other people wasting water
5. Good for long term water resource benefits
6. If everyone metered, prices will have to go up
7. It will stop me wasting water
8. It takes away people's choice
9. People's bills may go up too much
10. Other (specify)

---

Q22. **DELETE**

---

Q23. What do you think are the wider benefits of all homes in the region having a water meter installed? **DO NOT READ**

1. It will help people save money
2. Reduces need for new water supplies/resources
3. Reduces risk of water shortage
4. Makes people think about their water usage

5. There will be less stress on the region's water supply
6. It's a way of reducing demand for water
7. It's a way to help people save water
8. It helps to protect the natural environment by not taking too much water from it
9. It's a fairer way of charging people/pay for what you use
10. Other (specify)
11. Don't know

---

Q24. And what do you think are the overall drawbacks for all homes in the region having a water meter installed? **DO NOT READ**

1. Potential price increases
2. More expensive for large families
3. Being able to afford any price increase
4. Pushing people into debt
5. People might start to cut back on what they need which could have health implications
6. Distraction from carrying out repair & maintenance work
7. Confusing for people to understand the new system
8. None **GO TO Q27**
9. Other (specify)

---

Q25. Do you personally have any particular concerns about how you or your household might be affected by having a water meter installed? **DO NOT READ**

1. Potential price increase
2. More expensive as a large family
3. Being able to afford any price increase
4. Pushing me/us into water poverty debt?
5. Distraction from carrying out repair & maintenance work
6. Not being able to understand new bills and readings
7. Not being able to save enough water to reduce bill by as much as I'd like/expect
8. Would worry about what the bill would be whenever water was used
9. What would happen if there was a leak I had to pay for?
10. None
11. Other (specify)

---

Q26. DELETE

---

Q27. How do you think your water bill will be affected by going on to a water meter? **DO NOT READ**

1. It will go up a lot
2. It will go up a little
3. It will come down **GO TO Q30**
4. It will stay the same **GO TO Q30**
5. Don't know **GO TO Q30**

---

Q28. If **Q27 = 1 or 2**. How much would (answer from Q27) be to you?

---

Q29. **IF Q27 = 1 OR 2**. And what effect do you think the increase will have on your ability to afford your water bill. **READ OUT**

1. It won't make much difference
2. I will find it harder but expect I'll manage
3. I've always managed before but think I'll struggle to pay in future

4. I won't be able to afford the increase

To finish, I just have a few classifications to ask which will be used for analysis purposes only.

Q30. To which of these ethnic groups do you belong? **READ OUT**

1. White
2. Asian/Asian British
3. Black/Black British
4. African
5. Caribbean
6. Chinese
7. Eastern European
8. Other (specify)
9. Refused

Q31. At what level did you complete your education? If still studying, which level best describes the highest level of education you have obtained until now?

- 1 'O' levels / CSEs / GCSEs (any grades)
- 2 A levels / AS level / higher school certificate
- 3 NVQ (Level 1 and 2). Foundation / Intermediate / Advanced GNVQ / HNC / HND
- 4 Other qualifications (e.g. City and Guilds, RSA/OCR, BTEC/Edexcel))
- 5 First degree (e.g. BA, BSc)
- 6 Higher degree (e.g. MA, PhD, PGCE, post graduate certificates and diplomas)
- 7 Professional qualifications (teacher, doctor, dentist, architect, engineer, lawyer, etc.)
- 8 No qualifications

Q32. Thinking about all the people in your household, including yourself, please indicate how many people there are in each age group

- Up to 11 years ....0..... 1 ..... 2 ..... 3.....4 .....5+
- 12 to 16 years ....0..... 1 ..... 2 ..... 3.....4 .....5+
- 17 to 60 years ....0..... 1 ..... 2 ..... 3.....4 .....5+
- 61+ .....0..... 1 ..... 2 ..... 3.....4 .....5+

Q33. What is your total household income after tax?

PER MONTH	PER YEAR	(circle one)
Up to £500	Up to £6,000	1
£500 - £999	£6,000 - £11,999	2
£1000 - £1499	£12,000 - £17,999	3
£1500 - £1999	£18,000 - £23,999	4
£2000 - £2999	£24,000 - £35,999	5
£3000 - £4999	£36,000 - £59,999	6
£5000 - £7499	£60,000 - £89,999	7
£7500 and over	£90,000 and over	8
Don't know		
Refused		

---

Q34. And can you please tell me your full postcode? [IF ASKED, PLEASE STATE THAT THIS WILL BE USED FOR ANALYSIS PURPOSES ONLY; IF RESPONDENT IS RELUCTANT, PLEASE ASK FOR THE FIRST HALF OF THE POSTCODE ONLY, BUT RECORD IN FULL WHEREVER POSSIBLE]

1<sup>st</sup> half (eg EH2)

2<sup>nd</sup> half (eg 2EN)

---

Q35. We really appreciate the time that you have given us today. Would you be willing to be contacted again for clarification purposes or be invited to take part in other research for Southern Water?

Yes, for both clarification and further research

Yes, for clarification only

Yes, for further research only

No

**Thank you for your help in this research**

## 3 Milestone 2: Pre-installation, targeted marketing

### 3.1 Qualboard

#### 3.1.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>	1	
<b>Family</b>	3	2
<b>Post-family</b>	3	
<b>Retired</b>		2
<b>Vulnerable</b>	3	3

#### 3.1.2 Recruitment screener

##### Introduction

Good morning/afternoon/evening. My name is ..... and I am calling from Accent. We are an independent market research company carrying out some very important research for the Consumer Council for Water, the body that represents water consumers. Please could I speak to the person in your house who is responsible for paying your water bill?

**IF "NO" TRY AND PERSUADE ELSE THANK & CLOSE**

**IF "CALL BACK" PLEASE RECORD DATE AND TIME OF NEW APPOINTMENT BELOW, THANK AND CLOSE**

**IF "YES" PLEASE PROCEED TO SCREENING SECTION**

SCREENING APPOINTMENT 1	DATE		TIME	
SCREENING APPOINTMENT 2	DATE		TIME	
SCREENING APPOINTMENT 3	DATE		TIME	

WHEN SPEAKING TO APPROPRIATE CONTACT CONTINUE WITH SCREENING

##### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

Q1. Can you tell me who supplies your water and sewerage service?

1. Southern Water – both water and sewerage **CONTINUE**
2. Southern Water – water **CONTINUE**
3. Southern Water – sewerage **THANK & CLOSE**



4. Other **THANK & CLOSE**
5. Don't know **THANK & CLOSE**

---

Q2. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household's **water** bill(s)?

- 1 Yes **JOINTLY – GO TO Q3**
- 2 Yes **SOLELY – GO TO Q3**
- 3 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q3. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research, the Environment Agency or the water industry?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q4. Can I just check if you have a water meter which forms the basis of your water bill?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q5. Do you have access to a computer at home, or work, which you use regularly so that you could be involved in an online discussion?

- 1 yes
- 2 no **THANK & CLOSE**

---

Q6. Can you remember receiving an information pack from Southern Water about its water metering programme?

- 1 yes
- 2 no **THANK AND CLOSE**

---

Q7. And what do you remember seeing in the information pack? **TICK ALL THAT APPLY**

1. Leaflet
2. Letter
3. Pop up cube
4. Product discounts
5. Home Saver Check
6. Information about water meters/having to go on a water meter
7. Don't remember

**PLEASE CHECK QUOTAS. AIM TO ACHIEVE A MAJORITY WHO HAVE SOME RECOLLECTION OF RECEIVING ANY OF THE ABOVE.**

---

Q8. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

- 1 yes
- 2 no **GO TO Q10**

---

Q9. Have you taken part in market research about anything to do with **water**?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q10. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS 'E'. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

- |       |  |
|-------|--|
| 1. A  | 4. C2                                  |
| 2. B  | 5. DE                                  |
| 3. C1 | 6. Not stated <b>THANK &amp; CLOSE</b> |

**CHECK QUOTAS FOR SEG**

---

Q11. Can I check whether you are working or not and if so how much? **FOLLOW UP Q10 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- |                        |  |
|------------------------|--|
| 1 Working full-time    | 4 Not working                                  |
| 2 Working part-time    | 5 Taken early retirement                       |
| 3 Full-time home maker | 6 Retired at the state retirement age or later |
|                        | 7 Refused                                      |

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q12. Note Gender

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

---

Q13. Which of the following age groups do you fall into?

- |         |           |
|---------|-----------|
| 1 18-34 | 4 55 – 64 |
| 2 35-40 | 5 65+     |
| 3 41-54 | 6 Refused |

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q14. Do you have any children?

- |       |      |
|-------|------|
| 1 yes | 2 no |
|-------|------|

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q15. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q16. How many people aged 17 or over live in your household?

---

Q17. How many children aged 16 or under live in your household?

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q18. Do you or your partner have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q19. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q20 Finally, when it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

### Invitation: Qualboard

Thank you for answering those questions. We would be grateful if you could spare 10 to 15 minutes each day of the next three days, to take part in an online discussion with one of our research team. None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will send you a cheque/voucher for £10 to thank you for taking part. Would you be able to take part in our research?

#### PERSUADE AND REASSURE.

- 1. yes **TAKE CONTACT DETAILS (EMAIL ADDRESS)**
- 2. no **THANK AND CLOSE**

---

### THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH

#### 3.1.3 Discussion guide

Hello, my name is Jo and I work for an independent market research company called Accent. We are conducting research for the Consumer Council for Water, the body that represents water consumers. Thank you very much for agreeing to help us with this research.

The research is being conducted in accordance with the Code of Conduct of the Market Research Society (MRS) and also with the Data Protection Act, with whom Accent is registered. This means that everything you say during this discussion will be confidential and will not be attributed to you personally, so please express your views frankly.

The online discussion will take place over 3 days and you will be asked to log in each day and answer a few questions about the issues in hand and, we would encourage you to engage further in the debate with your fellow panellists. It is likely that it will take 10 to 15 minutes each day to answer the questions but you will also be required to take a bit of time to look at and think about various pieces of communication that will be shown to you.

Can I stress that we are looking for your personal views. There are no right or wrong answers. I hope you will all contribute to the discussion.

Please feel free to discuss these issues with the other people taking part in the discussion. We want to encourage a 'healthy debate'.

### *Day One - Introduction to research; General knowledge and understanding of Universal Metering Programme being carried out by Southern Water*

We're doing some research to find out what people know about Southern Water's plans to fit water meters to households in its region. We would like to get your views on this, and especially the various communications that Southern Water has put out to let people know about it. . Please answer as fully as you can and, if you like, comment on what other people have said.

- Have you heard anything about the water metering programme that Southern Water is carrying out, where it is installing water meters across its region?
- If yes: What have you heard about it? *Probe*
- Where did you hear this from? Prompt on – have you seen or heard any advertising about the programme, have you come across a Mobile Exhibition Unit, possibly in the car park of a local supermarket?
- Do you have any questions or concerns about what you have heard? If so, please state what they are.
- Do you have any idea why Southern Water is fitting water meters at households across its region?

Provide the following explanation

You may have seen or heard somewhere that Southern Water is carrying out a five year water metering programme. About 65% of Southern Water's customers now have a water meter and that proportion is increasing each year. So far Southern Water has installed 250,000 meters and by 2015 they will have fitted 500,000 meters. The company is doing the work on an area by area basis

Southern Water sends information packs to households ahead of work starting in any given region.

#### **Unprompted**

- Do you remember receiving any information from Southern Water about this?
- If yes: Can you tell me specifically what pieces of information you have received?
- And how did you receive this information?
- What did you think were the key things that Southern Water was trying to get across to customers?

- Was the information clear or did it leave you with any questions or concerns? What was unclear and what questions or concerns were you left with?
- Did the information help you understand why Southern Water is installing water meters across its region?
- Overall, how do you feel about Southern Water's metering programme as a result of this information?

### **Prompted**

- Do you remember a pack of information being put through your letterbox or given to you on the doorstep by a member of Southern Water's customer service team with the title 'Your water meter is coming'? If so, did you read it? If not, why not?
- (If read), Can you remember what was included in the pack?
- If read – What was the main message that you took from the pack?
- What did you think of it?
- If you met someone from the customer service team, did you talk to them about the metering programme and what it involved? Did you ask them any questions and were they able to help?
- Okay, so far we have discussed in quite general terms the metering programme that Southern Water is carrying out across its region and what you have seen or heard about it.
- We are now going to look more specifically at the information Southern Water has sent you. Take a few minutes to look at the different items in the information pack (see pdf link below). What do you think about it? We are going to go through each item later, but what are your initial thoughts of the pack?

Tomorrow, we are going to look at each piece of information in more detail so between now and then please take more time to have a read through each piece of information as you will be asked another set of questions about them. It might also be a good idea to talk with other people in your household to get their views too.

### *Day Two – Detailed Questioning about pre-installation UMP Information Pack*

So, yesterday we discussed what you know about Southern Water's plans to install water meters across its region and we started to look at some of the information it has been providing to customers. Today, we are going to look in more detail at each of the pieces of the information pack, so I hope you have managed to spend some time looking at the information and hopefully you might have got some thoughts from other people in the household.

- First of all let's look at the **leaflet** called '**Your new water meter is coming**' (part 1 of 2). Please tell me
  - How much you read – all of it, some of it or just skim read it
  - What you think of it – the design and the content of it
  - What it is telling you. Whether it is clear and easy to understand
  - What do you think about the tone of the information pack? How customer friendly do you find it?
  - Which bits have most impact for you?
  - How well the leaflet works in getting across these key messages

- Now can you do the same with the **letter** called ‘**Your water meter is coming**’
  - What you think of it – the design and the content of it
  - How clear and easy to understand do you find it?
  - What do you think about the tone of the letter? How customer friendly do you find it?
  - What is it telling you?
  - How well the letter works in getting across the key messages
- What about the **Pop up cubes** – Did you notice them? Do you remember them? How helpful were they?
  - Did anyone arrange an appointment to discuss their water supply and/or the meter location?
- Check if anyone has received a **Home Saver Check** as only available to Targeted customers. Is this something that you would take up or have taken up? If not, why? Is it helpful or not?
  - For those taking up Home Saver ask: Have you had any water saving devices installed as part of the Home Saver Check? If yes, how do you feel about this?
  - And did you discuss benefits entitlement as part of this process? How helpful was this?
  - Before you saw this free home saver check would you have known that using less heated water means you can cut your water and energy bills at the same time?
- Lastly, what did you feel about the **Help your Water Footprint offers**. Is this sort of thing important to you? Would you take these offers up? If not, why
- Has anyone called or will anyone call the telephone number that is provided in the leaflet and letter?
- If you have called Southern Water, what was that about? Did you get answers that helped you?
- Have you been to the web link as a result of receiving the pack?
- If yes: can you remember what you found on their website? How useful was it? Did it provide you with the information you needed?
- For those who haven’t telephoned or used the web-link – do you intend to do this?
- If so what information will you be looking for?
- **For all:**
- In the light of the various information you have read, how do you feel about Southern Water’s metering programme?
- What do you think are the good things about it? And is there anything that worries or concerns you about having a water meter? If so, what?
- Is there anything else that Southern Water could do to help you with these concerns?
- Do you have any suggestions for improving the information you have received/ or seen?

Thank you for all your valuable insights. That is the end of today’s questions. Tomorrow is the final day and we will have a bit more of a discussion about your water consumption and your water bills.

### *Day Three – Broad understanding of any billing and/or water consumption issues*

We finished off yesterday by talking about any worries or concerns that you have as a result of going on to a water meter. I would like to expand on that a bit further today as well as talk about your water usage.

- Do you have any concerns about how a water meter will affect your water bill? Do you think your bill will cost about the same, or more or less? Why do you say that?
- If you find that your water and sewerage bill is higher, is there anything you can do about this? If so, what? Do you expect Southern Water to be able to help in any way? How?  
Moderator - **Note any mention of changeover tariff:** if mentioned ask what the person's understanding is
- Are you aware of any help for those who might not be able to afford their metered bills? (Note to moderator: payment plans, a benefits entitlement check, WaterSure or a social tariff ie a lower tariff or different way of calculating the bill for customers in certain circumstances, advice and help to use less water)
- If your metered bill turned out to be less than what you paid before, what might you do? Will you enjoy the cost saving and try to keep future bills at the same level, or might you prefer to use more water than have a lower bill? Might it depend on how much the cost saving was?
- How would you describe your attitude to using water at home? Do you think this might change as a result of having the meter fitted?
  - **If yes:** how will it change? What do you think you will do differently compared to now? What actions do you think will save you most money?
  - Do you think the amount you pay will change as a result of taking these actions? Explore scale of change
  - **If no:** Why don't you think you will change how you use water?
  - What about other people in your household who don't pay the bill themselves – for example, children or lodgers – do they know there is a change coming which will affect the household water bill?
  - Did you discuss your household water use with them, if so when? Do you expect them to use water differently now they know that there is a water meter?.
- Do you think Southern Water has given you enough information about how to save water? How have they done this?
- What else could Southern Water do to help households like yours to save water?
- To finish, please can you say if your perceptions of Southern Water have changed since the meter programme started. Has the communication about the metering programme changed your views or was this the result of something else?

We will close there, thank you for all your very valuable contributions.

## 3.2 Focus group with non-internet users

### 3.2.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>		
<b>Family</b>		1
<b>Post-family</b>	1	1
<b>Retired</b>	1	2
<b>Vulnerable</b>		1

### 3.2.2 Recruitment screener

#### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

---

Q1. Can you tell me who supplies your water and sewerage service?

1. Southern Water – both water and sewerage **CONTINUE**
2. Southern Water – water **CONTINUE**
3. Southern Water – sewerage **THANK & CLOSE**
4. Other **THANK & CLOSE**
5. Don't know **THANK & CLOSE**

---

Q2. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household's **water** bill(s)?

- 1 Yes **JOINTLY – GO TO Q3**
- 2 Yes **SOLELY – GO TO Q3**
- 3 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q3. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research, the Environment Agency or the water industry?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q4. Can I just check if you have a water meter which forms the basis of your water bill?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q5. Do you have access to the Internet? This could be at home, at work, at the library or at a friend or relative's house?



1 yes **ASK Q6**

2 no **GO TO Q7**

---

Q6. How often do you use the Internet to find information you need? Do you use it regularly, occasionally, rarely or never?

- 1 regularly
- 2 occasionally
- 3 rarely
- 4 never

**THANK & CLOSE**  
**THANK & CLOSE**  
**NO MORE THAN 2 TO BE RECRUITED**  
**CONTINUE**

**NO MORE THAN 2 TO RARELY USE THE INTERNET; ALL OTHERS SHOULD HAVE EITHER CODE 2 @ Q5 OR CODE 4 @ Q6**

---

Q7. Can you remember receiving an information pack from Southern Water about its water metering programme?

1 yes

2 no **THANK AND CLOSE**

---

Q8. And what do you remember seeing in the information pack? **TICK ALL THAT APPLY**

- 1. Leaflet
- 2. Letter
- 3. Pop up cube
- 4. Product discounts
- 5. Home Saver Check
- 6. Information about water meters/having to go on a water meter
- 7. Don't remember

**PLEASE CHECK QUOTAS. AIM TO ACHIEVE A MAJORITY WHO HAVE SOME RECOLLECTION OF RECEIVING ANY OF THE ABOVE.**

---

Q9. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

1 yes

2 no **GO TO Q11**

---

Q10. Have you taken part in market research about anything to do with **water**?

1 yes **THANK & CLOSE**

2 no

---

Q11. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS 'E'. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

- 1. A
- 2. B
- 3. C1

- 4. C2
- 5. DE
- 6. Not stated **THANK & CLOSE**

**AS FOUND**

---

Q12. Can I check whether you are working or not and if so how much? **FOLLOW UP Q11 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- |                        |  |
|------------------------|--|
| 1 Working full-time    | 4 Not working                                  |
| 2 Working part-time    | 5 Taken early retirement                       |
| 3 Full-time home maker | 6 Retired at the state retirement age or later |
|                        | 7 Refused                                      |

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

Q13. Note Gender

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

Q14. Which of the following age groups do you fall into?

- |         |           |
|---------|-----------|
| 1 18-34 | 4 55 – 64 |
| 2 35-40 | 5 65+     |
| 3 41-54 | 6 Refused |

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

Q15. Do you have any children?

- |       |      |
|-------|------|
| 1 yes | 2 no |
|-------|------|

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q16. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

Q17. How many people aged 17 or over live in your household?

Q18. How many children aged 16 or under live in your household?

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q19. Do you or your partner have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

- |       |      |
|-------|------|
| 1 yes | 2 no |
|-------|------|

Q20. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance

- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q20 Finally, when it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

**Invitation: Focus Group**

Thank you for answering those questions. We would like to invite you to take part in a small discussion group with other customers of Southern Water. The discussion is about the information pack Southern Water sent to its customers explaining about its programme to install water meters in your area and about its water metering programme generally. The discussion will take place on [date] a [time and venue} and will last up to two hours. Light refreshments will be provided. None of your comments will be attributed to you personally. We can offer you £40 as a contribution to any expenses you may have and to thank you for taking part. Would you be able to take part in our research?

**PERSUADE AND REASSURE.**

- 3. yes **TAKE CONTACT DETAILS**
- 4. no **THANK AND CLOSE**

<b>RESPONDENT NAME</b>	
<b>ADDRESS</b>	
<b>TELEPHONE NUMBER</b>	

**THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH**

---

## Instructions

We are conducting one focus group lasting up to 2 hours among people who either do not have access to the Internet (code 2 @ Q5) or who have Internet access but use it either 'rarely' or 'never' (codes 3-4 @ Q6).

Everyone should be a customer of Southern Water (codes 1 or 2 @ Q1) and be responsible for paying their water bill (codes 1-2 @ Q2) but they must **not** have a water meter have had a meter fitted recently by Southern Water (code 2 @ Q4).

Everyone must also recall receiving an information pack from Southern water about its water metering programme (code 1 @ Q7)

There are no quotas in terms of demographics but we would like if possible

- SEG – as found (Q11)
- working status – as found (Q12)
- a fairly even split of men and women (Q13)
- a spread of ages (Q14)
- a mix of lifestages (see below)
- a range of size of household (Q16)

---

If you find people who have (or their partner has) a disability (code 1 @ Q19) and/or are in receipt of benefits (codes 1-9 @ Q20) and/or who sometimes struggle to pay their household bills (code 1 @ Q20) you can include them in the group – but no more than half the group should fall into this category. Please use your judgement as to whether someone might find it difficult to give their opinions in a group setting, for example, if they have a disability that affects their ability to communicate.

Use the following information to decide on lifestage

- Pre family: probably under 40 (Q14), no children (Q15), no children 16 or under living with them (Q18 – check because could be partner's children and then they would qualify as a family)
- Family: at least 1 child aged 16 and under living in the family home (Q18)
- Post-family: probably over 40 (Q14), may or may not have children (Q15), no children aged 16 or under living with them (Q18)
- Retired: mostly over 60 (women) and 65 (men) (Q14); no more than 1 customer to have taken early retirement (Q12). If a customer has retired early due to ill health, they would qualify as a 'vulnerable' customer (Q19).

## Exclusions

Apart from the usual exclusions, we do not want to include anyone who works in the water industry in any capacity (Q3). We also want to exclude anyone who has taken part in market research to do with water in the last 2 years (Q4).

### 3.2.3 Discussion guide

#### Introductions

- To the moderator and observers
- To the topic to be discussed – it is about the programme of installing water meters across the region by Southern Water and in particular, about the information they have received about this.
- To the research format; recording, anonymity, no right or wrong answers, cutting them off if necessary because so much to cover etc. Moderator explains the ground rules – not talking at the same time, listening, reflecting and commenting on what others have to say, mobile phones switched off/silent mode
- To each other – first names, family circumstances, what they do/used to do for a living
- Knowing that one of the things we want to discuss this evening is the information supplied to customers about the fitting of water meters in your area, how familiar would you say you are with this information? Each of the participants will be asked to respond individually and to say what they base this on e.g. whether they read the information pack and when, what other information they have looked at etc.

#### Top of mind awareness of and attitudes to the water metering programme

- What do you know about the programme to fit water meters? The group will be encouraged to report anything they have read or heard, even if they are unsure how accurate it is.
- Do you feel you have been given enough information about the programme so far?
- Is there anything else you would like to know? If so, what questions do you have?
- (If not already mentioned) Can I just check whether you recall reading/ hearing anything about –
  - when your meter will be installed
  - when the readings from your meter will start counting towards your first bill (when it will be 'switched on')
  - when you will receive your first bill based on a meter reading
  - something called the 'changeover' tariff
  - leaks in your supply pipes and how Southern Water will handle these?
- For each of these, we will explore what they know and where they might have picked up the information from (if recalled). (We will not give answers at this point)
- How do you feel about the programme and how it might affect you? What are the good things about it? What are not so good? Do you have concerns about it?

- How about more widely? What do you think the impact might be on customers more generally?
- Why do you think that water meters are being fitted for households in the region?

### **Sources of information**

- Where have you picked up your information from? The moderator will explore each of the spontaneously recalled sources for the type of information obtained, perceived reliability. This could be from work colleagues/neighbours/ family, media, the information pack provided etc.
- Moderator then prompts on some of the various sources to see if they have forgotten any (in addition to the above) –
  - local media – which ones?
  - leaflets in public places like libraries and post offices
  - Mobile Exhibition Unit (MEU)
  - member of Southern Water’s Customer service team (CST) calling at their home
  - visit from Southern Water team member to discuss fitting of the meter
  - website
  - social media
- Have they visited/ received/ read any of these? What do they recall about them and what they found out from them? If they visited the MEU or encountered a member of CST, what did they discuss? How satisfied were they with the answers they received/ what they were told? Did they get all the information they wanted?

### **‘Your new water meter is coming’ information pack**

- Thinking about the ‘Your new water meter is coming’ information pack,
  - do you remember receiving it? When?
  - did you read it – in how much detail? If not, why not?
  - did anyone else in your household read it? What did they make of it?
  - did you keep it? If so, why?
  - which of the different things in the pack do you recall (unprompted and then prompted; letter, booklet, offer of a Home Saver Check, fold-out leaflet about saving water, energy and money, discounts on garden products from B&Q, ‘pop-up’ cube that arrived with the pack)
- Taking each of the things in the pack that they remember, we will explore
  - what they remember it telling them
  - how useful/ helpful the information was
  - how easy the information was to understand/ take in – how customer friendly it was
  - with respect to the different versions of the pop-up cube, we will try to identify those participants who received each of them. We will then ask about what they recall of the key message of each cube and what they did as a result ie. the need to make an appointment (did they do this, with what results?) or ways in which

they will be given more information about their meter or can find out more about it themselves (did they go on the 'Mr Save-It' part of the SW website?)

- Did any of this information, as far as you can recall, raise any particular questions that were not answered in the pack?

**Each member of the group is given an information pack plus the pop-up cubes (with explanation of how and when they are used). They are asked to take the things out and look at them/ refamiliarise themselves with them – 5-10 mins will be allowed for this.**

- Do you think that it is important that customers look at everything in the pack or are some things more important than others? If so, which are they? Each participant is asked to sort them according to the ones they would give priority to and they are each asked for their reasons.
- Looking across all the pieces of information, what do you think of the design – how it looks? They are asked to pick out things they like and dislike about the different pieces in terms of their design. Are there particular features that
  - draw you in and make you want to read it?
  - make it easier to take in the information?
  - put you off?

**Each participant is given a photocopy of the letter and booklet and asked to mark up things**

- that they feel are especially important for customers in general to know
- they are unsure about or would like to find out more about
- Each of these is then explored and we will identify important items of information that participants are finding it difficult to take in.
- Is there any information that you feel is missing?

**Participants are asked to look at the information given on page 6 'How will I be charged'**

- Based on this information, what do you understand
  - about when you will change over to being charged according to the meter reading?
  - about the option to ask to be charged according to the meter reading as soon as it is installed – why might you want to do this?
  - by the 'changeover tariff'
  - about ways in which you might be helped if you have difficulty paying? With those who have expressed concerns about their bills increasing, we will explore whether this information is useful/ reassuring and whether they might seek more information at this stage (e.g. by phoning the number provided)
- Now that you have looked at the information, have any questions you had at the start of this discussion been answered? Are there new questions you would like to ask?
- Considering all the information you have now read, when do you think you will have your first metered bill?
  - If you opt to be charged using the meter reading from the date it is installed
  - If you wait until it is 'switched on' about 3 months later?
- How do you feel about the amount of information that has been provided in the pack? Does it seem enough, too much, about right? Thinking about the specific points we

have been discussing, do you think it would be useful to know more about any of these now, before your meter is installed - for example, to have more of a timeline of when things will happen and what decisions you need to make at each stage?

- What else could Southern Water do to help customers in advance of their meters being installed?

### **Behaviour change**

- How much do you and other members of your household think about how you use water at present? We will explore their attitude and what this means in the use of water of both the participants and the other members of their household.
- Have you/ others in your household used water differently since finding out that you are going to have a meter installed? If so, what are they? Why have you made changes at this stage?
- Do you expect to make changes/further changes to your water use in the future? If so,
  - at what point (once meter is installed, after the first bill if it is higher than currently paying)?
  - what kind of changes?
  - what sort of changes do you think will have greatest impact on your water bill?
- For those anticipating making changes, how difficult do you think it will be to persuade other members of your household to use less water?
- Thinking about the information that Southern Water has provided about how customers can save money by saving water and sometimes energy, has this been helpful to you? We will check whether anyone has visited the Mr Save-It microsite on the Southern Water website and if so, explore responses to this as well as to the 'Save water..' leaflet, the pages in the booklet (8 and 9), and the discounts at B&Q.
  - are there any suggestions that stand out as being things that you have used or might use in the future? What are they?
  - how about the discounts that Southern Water is offering customers on things like water butts – might this be something you would take up?
- Is there anything else that Southern Water could do to help customers save water?
- We will check if anyone has been offered a Home Saver Check and if they have, explore
  - what did you understand this was?
  - did you take up the offer? Why/ why not?
  - if they did take it up, what it consisted of and how useful they found it (if they mention that a Benefits Entitlement check was offered as part of this, we will explore how useful they found this)

### **Attitude to Southern Water and learnings**

- Has the metering programme made you more aware of Southern Water? Has it changed your views of the company at all? In what way/ why not?
- Other parts of the UK will also be undergoing compulsory metering programmes over the next few years and the Consumer Council for Water wants to learn from the experiences of customers like you. Is there anything that Southern Water could have



done differently? Is there any other information that it could provide? Is there any other practical help that they could have given?

- Is there anything else that bodies other than Southern Water could do to help (who and with what)?
- Each participant will be invited to say one thing that they think Southern Water has done well and that other water companies could copy or something new that they should think about doing.

### 3.3 In-home depth interviews

#### 3.3.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>	2	
<b>Family</b>	1	
<b>Post-family</b>		1
<b>Retired</b>	1	1
<b>Vulnerable</b>		4

#### 3.3.2 Recruitment screener

##### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

Q1. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household’s **water** bill(s)?

- 4 Yes **JOINTLY – GO TO Q2**
- 5 Yes **SOLELY – GO TO Q2**
- 6 no **ASK FOR CORRECT RESPONDENT & RESTART**

Q2. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research, the Environment Agency or the water industry?

- 1 yes **THANK & CLOSE**
- 2 no

Q3. This research is looking at the experience of **Southern Water** customers who have received information telling them that they are **due to have a water meter installed in**

**next few weeks** as part of Southern Water's programme of fitting meters across the region. Can I firstly check whether this applies to your home?

1 no **THANK & CLOSE** 2 yes

---

Q4. Can I just check which services Southern Water provides you with? Is it both water and sewerage, water only or sewerage only?

1. Both water and sewerage **CONTINUE**
2. Water only **CONTINUE**
3. Sewerage only **THANK & CLOSE**
4. Other **THANK & CLOSE**
5. Don't know **THANK & CLOSE**

---

Q5. Can I just check if you already have a water meter which forms the basis of your water bill?

1 yes **THANK & CLOSE** 2 no

---

Q6. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

1 yes 2 no **GO TO Q8**

---

Q7. Have you taken part in market research about anything to do with **water**?

1 yes **THANK & CLOSE** 2 no

---

Q8. Can you remember receiving an information pack from Southern Water about its water metering programme?

1 yes 2 no **THANK AND CLOSE**

---

Q9. And what do you remember seeing in the information pack? **TICK ALL THAT APPLY**

1. Leaflet
2. Letter
3. Pop up cube
4. Product discounts
5. Home Saver Check
6. Information about water meters/having to go on a water meter
7. Don't remember

**AIM TO ACHIEVE A MAJORITY WHO HAVE SOME RECOLLECTION OF RECEIVING ANY OF THE ABOVE**

---

Q10. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS 'E'. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

1. A
2. B
4. C2
5. DE

3. C1

6. Not stated **THANK & CLOSE**

**CHECK QUOTAS FOR SEG**

---

Q11. Can I check whether you are working or not and if so how much? **FOLLOW UP Q10 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- |                        |  |
|------------------------|--|
| 1 Working full-time    | 4 Not working                                  |
| 2 Working part-time    | 5 Taken early retirement                       |
| 3 Full-time home maker | 6 Retired at the state retirement age or later |
|                        | 7 Refused                                      |

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q12. Note Gender

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

---

Q13. Which of the following age groups do you fall into?

- |         |           |
|---------|-----------|
| 1 18-34 | 4 55 – 64 |
| 2 35-40 | 5 65+     |
| 3 41-54 | 6 Refused |

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q14. Do you have any children?

- |       |      |
|-------|------|
| 1 yes | 2 no |
|-------|------|

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q15. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q16. How many people aged 17 or over live in your household?

---

Q17. How many children aged 16 or under live in your household?

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q18. How often do you use the Internet to find information you need? Do you use it regularly, occasionally, rarely or never?

- |                |
|----------------|
| 1 regularly    |
| 2 occasionally |
| 3 rarely       |
| 4 never        |

**TRY TO GET A GOOD SPREAD ACROSS THE 8 INTERVIEWS**

---

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

---

Q19. Do you or your partner have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q20. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q21. Finally, when it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

### **Invitation: In-home interviews**

Thank you for answering those questions. We would be grateful if you and other members of your household could spare about an hour to take part in some research about your use of water and how you feel about the installation of water meters by Southern Water across the region. It would mean one of our research team coming to your house to talk to you and other members of your household (tailor to circumstances of the respondent eg. if have a family, emphasise that we would like to include any children that might be interested to take part). None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will give you £20 to thank you all for taking part. Would you be able to take part in our research?

NB. See requirement to film two of the interviews on the same day as two interviews for milestone 3. See recruiter instructions for details of this.

**PERSUADE AND REASSURE.**

- 1. yes **TAKE CONTACT DETAILS (EMAIL ADDRESS)**
- 2. no **THANK AND CLOSE**

---

**THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH**

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## Instructions

We will be conducting 10 depth interviews in-home, each lasting about an hour. 2 of these will be carried out by Ros Payne (which will also be filmed), 2 will be carried out by Jo East/ Beryl Wall and the rest by other members of the research team. The two interviews for Ros should be arranged to take place on the same day and in the same area as those for milestone 3. This could mean two interviews with people who are at home during the day (retired, unemployed) and two with families where members are not available until the early evening.

We wish to talk to people who have not yet had a water meter fitted but who are due to have one fitted as part of Southern Water's metering programme. They will be aware of this because they have received an information pack from Southern Water about it. It is important that all the bill payers are aware of having received the pack (Q8) and it would be helpful if they have opened it and recall seeing some parts of it (Q9).

**It would be helpful if, for the interview, they can have the information pack to hand or any other information they have received or picked up about having a water meter installed. However, if they have not kept this, it does not matter.**

We wish to talk to the main or joint bill payer for the water bill (Q1) but also involve in the interview other members of the household so that we can discuss how they might respond to having a meter. This could be a partner, a housemate or lodger, children etc. The children could be quite young (no younger than key stage 2 at primary school ie. 8 years old), teenage or adult – we are interested in talking to at least one other person in addition to the bill payer but would ideally like to include others too if they are interested in taking part. The incentive of £20 is for the complete household rather than individually.

Across the sample, we would like to include a range of size of household (Q15). We wish to include no more than 2 households with a single occupant and at least 5 households where there are 3 or more occupants. We are particularly keen to talk to larger households with 3 or more children aged 16 or under (Q17).

### **'Mainstream sample'**

8 of the interviews should be spread across lifestages and social grades (Q10) as shown below. Q11, 13, 14 and 17 should be used to arrive at a customer's lifestage

	ABC1	C2DE
Pre-family	1	1
Family	1	1
Post-family	1	1
Retired	1	1
Vulnerable	2 (as found)	

- Pre family: probably under 40 (Q13), no children (Q14), no children 16 or under living with them (Q17 – check because could be partner's children and then they would qualify as a family)

- Family: at least 1 child aged 16 and under living in the family home (Q17)
- Post-family: probably over 40 (Q13), may or may not have children (Q14), no children aged 16 or under living with them (Q17) but could have older/adult children
- Retired: mostly over 60 (women) and 65 (men) (Q13); no more than 2 customers to have taken early retirement (Q11). If a customer has retired early due to ill health, they would qualify as a 'vulnerable' customer (Q19).

### **'Vulnerable sample'**

2 of the interviews should be with households that may face particular problems with paying their water bill ('vulnerable' in the table above). They may come from any lifestage. Those who qualify for these interviews should

- have, or have a partner, who has a long term impairment/illness (Q19)
- and/or be in receipt of one or more benefits (Q20)
- and/or struggle to pay their household bills at least some of the time (Q21)

If you have problems finding customers at the pre-family lifestage, please try to find more 'vulnerable' customers in their place.

### **Exclusions**

Apart from the usual exclusions, we do not want to include anyone who works in the water industry in any capacity or for the Environment Agency (Q2). We also want to exclude anyone who has taken part in market research to do with water in the last 2 years (Q6 and 7).

### **Filming**

Two of the interviews will be filmed. You should explain that the filming will be done with a single camera and the camera man will be as unobtrusive as possible. It will be helpful if the interview is conducted in their largest room such as a living room. The purpose of the filming is to be able to bring the research findings to life. We will take small sections from the film and use them in presenting the findings. They may also be used in the same way by the Consumer Council for Water and Southern Water in talking to staff and the water industry about customers' experiences. They will not be in the public domain such as on a website unless those taking part specifically agree to this. As always, the identity of those taking part will not be revealed.

### 3.3.3 Discussion guide

#### Introductions

- To the interviewer and the topic to be discussed – it is about the programme of installing water meters across the region by Southern Water, their feelings about the prospect of having a meter and the information they have received about this. It is being carried out on behalf of the Consumer Council for Water, the independent body that represents consumers' interests in the water industry.
- To the research format; recording (film &/or audio), anonymity, no right or wrong answers, cutting them off if necessary because so much to cover etc.
- Members of the household introduce themselves and identify other members who are not present

NB. We will try to draw out the views of non bill-paying members of the household before the bill-payer as the latter is likely to be more knowledgeable although the issues in the later part of the discussion will probably be addressed by the bill-payer.

Also if other MoH are younger/ less interested, we could ask them to stick around at least for the first part of the discussion that covers top of mind awareness and behaviour change.

#### Top of mind awareness of and attitudes to the water metering programme

- Who (in the household) is aware that you are going to be having a water meter installed soon (is anyone not aware)? What does this mean ie. are they aware of the change in the way of charging to one based on the amount of water used?
- How did you first find out about this and when – we might start here with the non-bill payer(s) to see whether it was the bill-payer who told them or whether they found out some other way and then move on to the bill-payer (could be word of mouth, advertising, first information pack etc.)
- How did you feel about it when you first heard/ how do you feel about it now? How do you think it is going to affect you (do you know)? Each of the household members will be asked individually about how they feel and how they think they might be affected by it
- Do you expect your water and sewerage bill to go up, down or stay about the same and why do you think this (each MoH will be asked)?

As part of this, we will explore any concerns they might have - we could prompt here as necessary on size of bills and ability to pay the bill (if appropriate given household setting), about the installation process, about leaks – what could reassure them about their concerns (eg. help with paying bills, how the installation will be handled, leaks fixed for free etc)

- Do you have any idea of what will happen between now and getting your first bill based on a meter reading?
  - when your meter will be installed
  - where your meter will be installed
  - when the readings from your meter will start counting towards your first bill (when it will be 'switched on')
  - when you will receive your first bill based on a meter reading
- Why do you think all the households in your area are being fitted with a water meter? If not mentioned so far, we will explain that it is because current levels of water use mean that water resources, such as rivers, are under serious pressure and this is likely to get worse with population growth and climate change. Metering means that customers will

be more aware of the water they use because they are being charged on the basis of what they use. How do you feel about it now you know the reason? Do you think it's a fairer way of charging? If so, in what way (as necessary, check whether it's fairer because you pay for what you use and/or because everyone has to have a meter)

### **Behaviour change**

- How much do you think about how you use water at present – are some members of the family/ household (MoH) more careful than others? If some members use more water than others, what does this mean (e.g. lots of baths/ long showers/ putting clothes in the wash that are hardly worn). If some members use less water than others or save water in some way – how?
- Do you think you will change how much water you use and how you use it because of having a water meter? Why would you do this/ why wouldn't you? Is there any information that you need to help you to decide whether to do this? What is it?
- Have you started to use water differently since finding out that you are going to have a meter installed? If so, what changes have you made? Why have you made these particular changes?
- If the bill-payer has tried to encourage everyone to be more aware and use less water, what has he/she tried to do and how successful has he/she been? What do other MoH think of his/her efforts? Is he/she right to try and make changes now?
- Do you expect to make changes/further changes to how you use water in the future in the home or outside in the garden? (We would expect the bill payer to answer these questions in the main but will invite others to comment) If changes are envisaged,
  - at what point do you think you might do this (once the meter is installed, after the first bill if it is higher than you are currently paying)?
  - what kind of changes?
  - what sort of changes do you think will have greatest impact on your water bill? What impact do you hope these changes will have on your bill?
- How do other MoH feel about such changes and how difficult/easy do they think it will be to implement them?
- For MoH who are less keen on making changes, is there anything that might convince them of the need to use less water or things that might make it easier for them?

### **General response to information**

**If they have it available, the MoH are asked to show the materials they have picked up/ received telling them about the water meter installation. If they have not kept any materials/ do not have them to hand, the interviewer will show them the MoH the information pack, 'Your new water meter is coming' and focus on this.**

- (If materials are available), the bill-payer (or others if relevant) is asked to talk through how and when each piece was obtained. The interviewer checks who among the MoH have seen each piece/ read it
- (If the interviewer has to present the information pack) he/she will check whether the MoH have seen it, when it was received, how it arrived and whether they have read it
- The interviewer checks whether, in addition to these materials, the MoH have come across other communications (interviewer to tick items on list below).



<b>Before installation</b>
leaflets in public places like libraries and post offices
Mobile Exhibition Unit (MEU)
member of Southern Water's Customer service team (CST) calling at their home
information pack called 'Your new water meter is coming'
'pop-up cube'
Southern Water's website
social media

**This part of the discussion will firstly be grounded in what the MoH have come across/read. If the information pack has to be shown to the MoH or they have one but have not read it and they are reading it for the first time, we will give them a few minutes to do this, focusing on the booklet.**

**(Interviewer – ask these questions in relation to any of those items ticked in the box above)**

- We will explore for the information pack in particular but other relevant items also
  - any piece of information that stands out and made an impact on them
  - how easy the information was to understand/ take in – how customer friendly it was
  - how useful/ helpful they thought the information was
  - anything that they had difficulty understanding and could have been clearer
  - anything that they found reassuring
- If they recall the pop-up cube, what do they think its purpose is, what do they recall of its messages, did information on it prompt them to do anything? (eg. the need to make an appointment, looking at the 'Mr Save-It' part of the SW website?) If they did this, with what results?
- If they visited the MEU or encountered a member of CST, what did they discuss? How satisfied were they with the answers they received/ what they were told? Did they get all the information they wanted?
- Have they (recently) had a reason to contact SW about the meter installation or on any other matter about their bill? How did they do this? What did they want to find out? How satisfied were they with the answers they received/ what they were told? Did they get all the information they wanted?

### **Response to specific information**

- Thinking about the information that Southern Water has provided about how customers can save money by saving water and sometimes energy, has this been/ do you think it could be helpful to you? Are there any suggestions that stand out as being things that you have used or might use in the future? What are they?

- Is there anything else that Southern Water could do to help customers save water?
- We will check if anyone has been offered a Home Saver Check and if they have, explore
  - what did you understand this was?
  - did you take up the offer? Why/ why not?
  - if they did take it up, what it consisted of and how useful they found it (if they mention that a Benefits Entitlement check was offered as part of this, we will explore how useful they found this)

**(If not brought up thus far) MoH are asked to look at the information given on page 6 'How will I be charged'**

- Based on this information, what do you understand
  - about when you will change over to being charged according to the meter reading?
  - about the option to be charged according to the meter reading as soon as it is installed – why might you want to request this?
  - by the 'changeover tariff'
  - about ways in which you might be helped if you have difficulty paying? With those customers who have expressed concerns about their bills increasing, we will explore whether this information is useful/ reassuring and whether they might seek more information at this stage – how?
- Considering all the information you have now read, when do you think you will have your first metered bill?
  - if you opt to be charged using the meter reading from the date it is installed
  - if you wait until it is 'switched on' about 3 months later?
- What else could Southern Water do to help customers in advance of their meters being installed? If there was one question you would like to ask them, what would it be?

**Attitude to Southern Water and learnings**

- Has the metering programme made you more aware of Southern Water? Has it changed your views of the company at all? In what way/ why not (follow up to find out what they thought/think of SW)?
- Has it made you think differently about what is involved in ensuring that this region has a reliable supply of water? (If not think differently, has it made them more aware?)
- Other parts of the UK will also be undergoing compulsory metering programmes over the next few years and the Consumer Council for Water wants to learn from the experiences of customers like you. Is there anything that Southern Water could have done differently? Is there any other information that it could provide? Is there any other practical help that they could give?





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Q13. How many children aged 16 or under live in your household?

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**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

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**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q14. Do you or your partner have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q15. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q16. When it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

---

Q17. Do you have access to the Internet? This could be at home, at work, at the library or at a friend or relative's house?

1 yes

2 no

---

Q18. How often do you use the Internet to find information you need? Do you use it regularly, occasionally, rarely or never?

- 1 regularly
- 2 occasionally
- 3 rarely
- 4 never

**PLEASE INCLUDE SOME CUSTOMERS WHO DO NOT HAVE ACCESS TO THE INTERNET OR HAVE ACCESS BUT NEVER USE IT OR USE IT RARELY**

## Invitation: Telephone depth

Thank you for answering those questions. We would be grateful if you could spare a further 30 minutes, to take part in an interview over the telephone with one of our research team at a date and time that is convenient for you. None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will send you a cheque/voucher for £10 to thank you for taking part. Would you be able to take part in our research?

**PERSUADE AND REASSURE.**

1. yes **TAKE CONTACT DETAILS (PAGE 1) AND MAKE APPOINTMENT**
2. no **THANK AND CLOSE**

**NB. IF THE CUSTOMER HAS SOME FORM OF DISABILITY, PLEASE USE YOUR DISCRETION IN ASKING WHETHER THIS MIGHT AFFECT HOW WE CONDUCT THE INTERVIEW**

## THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH

### Instructions

We will be conducting 30 semi-structured interviews each lasting about 30 mins; 9 of these will be carried out by Jo East, Beryl Wall and Ros Payne; these will be conducted in advance of the other 21.

Everyone should have had a meter fitted recently by Southern Water (Q1). Occasionally, you may find that someone has been assessed to see if it is possible to install a meter and it has not been possible. **They may be recruited but we do not want to speak to more than 2 customers in this situation.**

It could also be the case that a customer already had a meter but this has been changed for a more modern model. **We do not wish to speak to these customers; please explain that the research is to understand the views of people who are new to having a meter.**

Everyone should be the main or joint bill payer for their water bill (Q2)

Across the sample, we would like a fairly even split of men and women (Q8) and a range of size of household (Q11)

### 'Mainstream sample'

24 of the 30 interviews should be spread across lifestages and social grades (Q6) as shown below. Q7, 9, 10 and 13 should be used to arrive at a customer's lifestage

	ABC1	C2DE
Pre-family	3	3
Family	3	3
Post-family	3	3
Retired	3	3
Vulnerable	6 (as found)	

- Pre family: probably under 40 (Q9), no children (Q10), no children 16 or under living with them (Q13 – check because could be partner’s children and then they would qualify as a family)
- Family: at least 1 child aged 16 and under living in the family home (Q13)
- Post-family: probably over 40 (Q9), may or may not have children (Q10), no children aged 16 or under living with them (Q13)
- Retired: mostly over 60 (women) and 65 (men) (Q9); no more than 2 customers to have taken early retirement (Q7). If a customer has retired early due to ill health, they would qualify as a ‘vulnerable’ customer (Q14).

### **‘Vulnerable sample’**

Six of the interviews should be with households that may face particular problems with paying their water bill (‘vulnerable’ in the table above). Those who qualify for these interviews should

- have, or have a partner, who has a long term impairment/illness (Q14)
- and/or be in receipt of one or more benefits (Q15)
- and/or struggle to pay their household bills at least some of the time (Q16)

Ideally, we would like to interview some of these customers in the first 9 interviews. We would like at least two of these interviews to be with families with 3 or more children aged 16 or under (Q13)

### **Internet access**

We would like to include across the sample some people who either do not have access to the internet (Q17) or who have access but do not use it (Q18). There is no quota for this.

### **Exclusions**

Apart from the usual exclusions, we do not want to include anyone who works in the water industry in any capacity (Q3). We also want to exclude anyone who has taken part in market research to do with water in the last 2 years (Q4).

### 4.1.3 Discussion guide

#### Introductions

- The research is being carried out on behalf of the Consumer Council for Water which is the organisation that represents water consumers.
- It is interested in talking to SW customers about their experience of, and views on, the water company's programme of installing meters for all its customers.
- Check that respondent has had a meter installed recently or has been assessed for a meter but it was not possible to have one fitted. If the latter, refer to section 2.
- Reassure about anonymity of response
- Confirm that the interview will last about 30 mins and that he/she will receive £10 as a gesture of thanks – check name and address to which it should be sent.

#### Immediate response to installation

- When was your meter installed?
- Were you at home at the time? Were you aware of it being installed?
- How did the installation go? Did it run smoothly? Were there any problems? Explore the nature of these and any action that was taken by the customer as well as any response by SW or its sub-contractors

Check out -

- Did someone have to make an appointment to look at whether and where a meter could be fitted? If so,
  - were you able to arrange an appointment at a time that suited you?
  - how did the survey go?
- Are you happy with the location of the meter?
  - did you have a say in where the meter was fitted? If not – explore why this was
  - do you want to be able to read the meter yourself? Have you tried to do so? If so, were you able to do so? If not tried, or tried unsuccessfully, would it be helpful if someone showed you how to read your meter?
- What did you think of the attitude and behaviour of the workmen?
  - were they courteous?
  - did they take into account your need to be able to get in and out of your property?
  - did they leave the area tidy after they finished installing the meter?
- Overall, was the installation better or worse than you expected?
- Did you contact SW about having a water meter either before it was installed or since? If yes:
  - Were you able to get through?
  - What was the reason for getting in contact (explore reason)? Were SW able to resolve the issue?
- If you didn't contact them, was that because there was no reason to do so or something else?



## Information at installation

- Did you receive any information at the time of installation? Spontaneous recall
- (If not recalled), do you remember a pack of information being put through your letterbox with the title 'Your water meter is here'?
  - (If seen), did you read it? If not, why not? (Do you think you might read it at some point - when?)
  - (If read), what can you remember about it? What did you think of it? Did it offer useful information?
- (If not mentioned), there may have been a Customer Information Point in the local area during the installation period. Were you aware of this? Did you use it?
- (If not aware of this) If you had a question or problem, do you think you might have used this? Why/ why not? What else might you do?
- (If not mentioned) did you notice blue (before installation) or pink (on day of installation) signs on lampposts in the streets? Did you read them? What did you think of them?

## Pre-installation communications

- Were you aware that a meter was going to be installed in advance of it happening?
- How were you made aware of this? Spontaneous and prompt for anything else.
- (If not recalled), do you remember a pack of information being put through your letterbox with the title 'Your water meter is coming'? If so, did you read it? If not, why not?
- (If read), what can you remember about it? What did you think of it? Did it offer useful information?
- Did a member of SW's Customer Service team come to your door? What do you think was the purpose of their visit? Did you talk to them/ ask them any questions? Was it useful? What did you think of their manner?
- Did you follow up the link in the booklet to SW's website to find out more?
- if yes: can you remember what you found on their website? How useful was it? Did it provide you with the information you needed?
- Overall, how do you feel about the level of support provided by SW leading up to and during installation of the meter?
- how would you rate the level of support provided by SW on a scale from 0-10 where 10 is an excellent level of support?

## Expected Impact on Bills

- How do you feel about having a meter - do you have any concerns about this?
- (If not mentioned) Do you have any concerns about the effect on your water and sewerage bills of having a meter? What are these – do you expect your bill to go up or down? Why do you say that?
- (If not mentioned) Do you have any concerns about leaks? Do you have any concerns about getting a higher bill as a result of a leak? Are you aware of that the meter has a 'leak alarm' to help Southern Water detect a leak?
- If you find that your water and sewerage bill is higher, what do you think you might do? Do you expect SW to be able to help in any way? How?

- If your bill goes down, what might you do? (Explore whether respondent might feel encouraged to use more water)
- Have you heard of the 'changeover tariff'?
  - (If aware of it) What do you understand it is? Did you think about going on to this tariff? Why/ why not? (if the tariff is brought up earlier, discuss understanding then)
  - (If not aware) Explain that this is to help customers who will have to pay more with a meter. SW reduce their bill for the first two years – an amount that does not have to be repaid - in order to make the change easier to cope with.
- Are you aware of any additional help for those who cannot afford their metered bills? Explain if necessary that these include a payment plan, a benefits entitlement check, a social tariff i.e. a reduced tariff paid for by charging other customers a small amount more. What do you think of these?

### **Behaviour Change**

- How would you describe your attitude to using water at home before you had a meter fitted (never thought about it, wasteful, conscientious etc.)?
- Do you think you and others in your household have changed your attitude to using water since having a water meter? How? (explore if everyone is on board)
- (If attitude has changed) How have you changed your behaviour – what are you now doing compared to what you used to do? When did you start doing this (was it as soon as the meter was fitted or at some other point?) and why then? What difference do you think this will make to your bill? Would you say these changes are worthwhile – that is, they will have a noticeable impact on your bills?
- (If attitude has not changed) Why not? (may be because already try to conserve water – if so, what are they doing and what do they expect the impact of this to be/ don't think their bills will be higher/ can afford higher bills/ not being charged on the basis of the meter reading yet)
- Do you think that you and others in your household will change how you use water in the future now that you have a water meter? Explore why / why not?
- How do you expect to change your behaviour? What actions do you think will save you most money? Why?
- Do you think SW has given you sufficient information about how to save water? How have they done this?
- Were you offered a free home saver check when someone would visit you and talk to you about ways of saving water and energy? If so, did you take it up? Why/Why not? Explore usefulness.
- What else could SW do to help households save water?

### **Expectations about what happens next**

- What do you expect to happen next with respect to billing?

Note to interviewer: Customers may or may not be aware that their meter is not yet 'turned on' (activated). 3 months after their meter is installed, they will receive a letter telling them that the meter has just been 'turned on'; 6 months after installation, they receive a letter advising them of their level of water usage and what their first bill is likely to be if they continue using water at

this level. 3 months later (ie. 6 mths after the 'switch' letter and 9 mths after installation), they receive their first bill.

- If they mention getting a first bill, ask
  - When do you expect to receive this?
  - Do you think your water meter is already activated?
- Explain the staged process in the box above
  - Do they recall reading or hearing anything about this process for gradually moving customers on to a metered bill?
  - What do they think of doing it this way?

### Attitude to the Metering Programme

#### READ OUT:

You may have seen or heard somewhere that Southern Water is carrying out a five year water metering programme. About 65% of Southern Water's customers now have a water meter and that proportion is increasing each year. Southern Water has installed 250,000 meters to date and will have completed 500,000 installations by 2015.

- How do you feel about SW's metering programme? What do you see as the good things about it? And the not so good?
- Why do you think it is being carried out? How do you feel about this?

**If the customer is not aware of why it is being carried out or their explanation differs from that below** – Explain that it is because current levels of water use mean that water resources, such as rivers, are under serious pressure. This is likely to get worse with population growth and climate change. Metering means that customers will be more aware of the water they use because they are being charged on the basis of what they use. It is also fair for everyone to be billed in the same way and it should also result in customers using less water.

- How do you feel about the programme in this context?

### Attitude to Southern Water and learnings

- Has the metering programme changed what and how you think of SW? Explore what they thought before and after.
- Has it made you think differently about what is involved in ensuring that this region has a reliable supply of water?
- Explain that the CCWater and SW want to learn from customers' experience. Is there anything else that you feel you should have been told about the metering programme or about the meter or the way you will be billed?
- Do you feel that there is anything else that SW could have done to
  - communicate with their customers about the metering programme?
  - improve their arrangements for installing meters?
  - help customers adapt to switching to the new method of charging (eg. should they have been better informed about the staged process of switching?)
- Is there anything else that you would like to add?

## 4.2 In-home depth interviews

### 4.2.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>		
<b>Family</b>	1	1
<b>Post-family</b>	1	1
<b>Retired</b>	1	1
<b>Vulnerable</b>		4

### 4.2.2 Recruitment screener

#### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

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Q1. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household's **water** bill(s)?

- 1 Yes **JOINTLY – GO TO Q2**
- 2 Yes **SOLELY – GO TO Q2**
- 3 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q2. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research, the Environment Agency or the water industry?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q3. This research is looking at the experience of **Southern Water** customers who have had a **water meter installed in the last three months (since October 2012)** as part of Southern Water's programme of fitting meters across the region. Can I firstly check whether this applies to your home?

- 1 no **THANK & CLOSE**
- 2 yes

---

Q4. Can I just check which services Southern Water provides you with? Is it both water and sewerage, water only or sewerage only?

- 1. Both water and sewerage **CONTINUE**
- 2. Water only **CONTINUE**
- 3. Sewerage only **THANK & CLOSE**
- 4. Other **THANK & CLOSE**
- 5. Don't know **THANK & CLOSE**

---

Q5. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

- 1 yes
- 2 no **GO TO Q7**

---

Q6. Have you taken part in market research about anything to do with **water**?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q7. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS 'E'. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

- 1. A
- 2. B
- 3. C1
- 4. C2
- 5. DE
- 6. Not stated **THANK & CLOSE**

**CHECK QUOTAS FOR SEG**

---

Q8. Can I check whether you are working or not and if so how much? **FOLLOW UP Q7 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- 1 Working full-time
- 2 Working part-time
- 3 Full-time home maker
- 4 Not working
- 5 Taken early retirement
- 6 Retired at the state retirement age or later
- 7 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

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Q9. Note Gender

- 1. Male
- 2. Female

---

Q10. Which of the following age groups do you fall into?

- 1 18-34
- 2 35-40
- 3 41-54
- 4 55 – 64
- 5 65+
- 6 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q11. Do you have any children?

1 yes

2 no

---

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q12. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q13. How many people aged 17 or over live in your household?

---

Q14. How many children aged 16 or under live in your household?

---

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q15. How often do you use the Internet to find information you need? Do you use it regularly, occasionally, rarely or never?

- 1 regularly
- 2 occasionally
- 3 rarely
- 4 never

---

**TRY TO GET A GOOD SPREAD ACROSS THE 8 INTERVIEWS**

---

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q16. Do you or your partner have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q17. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q18 Finally, when it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

### **Invitation: In-home interviews**

Thank you for answering those questions. We would be grateful if you and other members of your household could spare about an hour to take part in some research about your use of water and how you feel about the installation of water meters by Southern Water across the region. It would mean one of our research team coming to your house to talk to you and other members of your household (tailor to circumstances of the respondent eg. if have a family, emphasise that we would like to include any children that might be interested to take part). None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will give you £20 to thank you all for taking part. Would you be able to take part in our research?

NB. See requirement to film two of the interviews on the same day as two interviews for milestone 2. See recruiter instructions for details of this.

**PERSUADE AND REASSURE.**

1. yes **TAKE CONTACT DETAILS (EMAIL ADDRESS)**
2. no **THANK AND CLOSE**

---

**THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH**

---

## Instructions

We will be conducting 10 depth interviews in-home, each lasting about an hour. 2 of these will be carried out by Ros Payne (which will also be filmed), 2 will be carried out by Jo East/ Beryl Wall and the rest by other members of the research team. The two interviews for Ros should be arranged to take place on the same day and in the same area as those for milestone 3. This could mean two interviews with people who are at home during the day (retired, unemployed) and two with families where members are not available until the early evening.

We wish to talk to people who have had a water meter fitted by Southern Water in the last three months as part of its metering programme (Q3). If their meter was installed **earlier than October, do not recruit them.**

**It would be helpful if, for the interview, they can have any information to hand that they have received or picked up about having a water meter installed. However, if they have not kept this, it does not matter.**

We wish to talk to the main or joint bill payer for the water bill (Q1) but also involve in the interview other members of the household so that we can discuss how they might respond to having a meter. This could be a partner, a housemate or lodger, children etc. The children could be quite young (no younger than key stage 2 at primary school ie. 8 years old), teenage or adult – we are interested in talking to at least one other person in addition to the bill payer but would ideally like to include others too if they are interested in taking part. The incentive of £20 is for the complete household rather than individually.

Across the sample, we would like to include a range of size of household (Q12). We wish to include no more than 2 households with a single occupant and at least 5 households where there are 3 or more occupants. We are particularly keen to talk to larger households with 3 or more children aged 16 or under (Q14).

### ‘Mainstream sample’

8 of the interviews should be spread across lifestages and social grades (Q7) as shown below. Q8, 10, 11 and 14 should be used to arrive at a customer’s lifestage

	ABC1	C2DE
Pre-family	1	1
Family	1	1
Post-family	1	1
Retired	1	1
Vulnerable	2 (as found)	

- Pre family: probably under 40 (Q10), no children (Q11), no children 16 or under living with them (Q14 – check because could be partner’s children and then they would qualify as a family)
- Family: at least 1 child aged 16 and under living in the family home (Q14)
- Post-family: probably over 40 (Q10), may or may not have children (Q11), no children aged 16 or under living with them (Q14) but could have older/adult children



- Retired: mostly over 60 (women) and 65 (men) (Q10); no more than 2 customers to have taken early retirement (Q8). If a customer has retired early due to ill health, they would qualify as a 'vulnerable' customer (Q16).

### **'Vulnerable sample'**

2 of the interviews should be with households that may face particular problems with paying their water bill ('vulnerable' in the table above). They may come from any lifestage. Those who qualify for these interviews should

- have, or have a partner, who has a long term impairment/illness (Q16)
- and/or be in receipt of one or more benefits (Q17)
- and/or struggle to pay their household bills at least some of the time (Q18)

If you have problems finding customers at the pre-family lifestage, please try to find more 'vulnerable' customers in their place.

### **Exclusions**

Apart from the usual exclusions, we do not want to include anyone who works in the water industry in any capacity or for the Environment Agency (Q2). We also want to exclude anyone who has taken part in market research to do with water in the last 2 years (Q5 and 6).

### **Filming**

Two of the interviews will be filmed. You should explain that the filming will be done with a single camera and the camera man will be as unobtrusive as possible. It will be helpful if the interview is conducted in their largest room such as a living room. The purpose of the filming is to be able to bring the research findings to life. We will take small sections from the film and use them in presenting the findings. They may also be used in the same way by the Consumer Council for Water and Southern Water in talking to staff and the water industry about customers' experiences. They will not be in the public domain such as on a website unless those taking part specifically agree to this. As always, the identity of those taking part will not be revealed.

## 4.2.3 Discussion guide

### Introductions

See 3.3.3

### Top of mind awareness of and attitudes to the water metering programme

- Is everyone in the household aware that a water meter has been installed (is anyone not aware)? What does this mean ie. are they aware of the change in the way of charging to one based on the amount of water used?
- How did you first find out about this and when – we might start here with the non-bill payer(s) to see whether it was the bill-payer who told them or whether they found out some other way and then move on to the bill-payer (could be word of mouth, advertising, first information pack etc.)
- How did you feel about it when you first heard about having meter fitted/ how do you feel about it now? How do you think it is going to affect you (do you know)? Each of the household members will be asked individually about how they feel and how they think they might be affected by it
- Do you expect your water and sewerage bill to go up, down or stay about the same and why do you think this (each member of the household - MoH will be asked)?

As part of this, we will explore any concerns they might have - we could prompt here as necessary on the impact it might have on their use of water (explore whether MoH understand how they personally use water could affect what the bill payer/ parents have to pay) size of bills and ability to pay the bill (if appropriate given household setting), about the installation process, about leaks – what could reassure them about their concerns (eg. help with paying bills, how the installation will be handled, leaks fixed for free etc)

- Do you have any idea of what will happen between now and getting your first bill based on a meter reading?
  - when the readings from your meter will start counting towards your first bill (when it will be 'switched on') – has it already been 'switched on'?
  - when you will receive your first bill based on a meter reading
  - whether you will get any other information about how much water you are using before you get your first bill?
- Why do you think all the households in your area are being fitted with a water meter? If not mentioned so far, we will explain that it is because current levels of water use mean that water resources, such as rivers, are under serious pressure and this is likely to get worse with population growth and climate change. Metering means that customers will be more aware of the water they use because they are being charged on the basis of what they use. How do you feel about it now you know the reason? Do you think it's a fairer way of charging? If so, in what way (as necessary, check whether it's fairer because you pay for what you use and/or because everyone has to have a meter)

### Behaviour change

- How much do you think about how you use water at present – are some members of the family/ household (MoH) more careful than others? If some members use more water than others, what does this mean (e.g. lots of baths/ long showers/ putting clothes in the wash that are hardly worn). If some members use less water than others or save water in some way – how?

- Do you think you will need to change how much water you use and how you use it because of having a water meter? Why would you do this/ why wouldn't you? Is there any information that you need to help you to decide whether to do this? What is it?
- Have you already started making changes to how you use water? If so, what changes have you made? Why have you made these particular changes? When did you start making the changes (before the meter was fitted/ once it was fitted?)
- If the bill-payer has tried to encourage everyone to be more aware and use less water, what has he/she tried to do and how successful has he/she been? What do other MoH think of his/her efforts? Is he/she right to try and make changes now?
- Do you expect to make changes/further changes to how you use water in the future? (We would expect the bill payer to answer these questions in the main but will invite others to comment). If changes are envisaged,
  - at what point do you think you might do this (after they are told about how much water they are using and what their first bill might be, after they receive their first bill if it is higher than they are currently paying)?
  - what kind of changes?
  - what sort of changes do you think will have greatest impact on your water bill? What impact do you hope these changes will have on your bill?
- How do other MoH feel about such changes and how difficult/easy do they think it will be to implement them?
- For MoH who are less keen on making changes, is there anything that might convince them of the need to save water or things that might make it easier for them?

### **Installation of the meter**

- When was your meter installed? Was anyone at home at the time? Were you aware of it being installed?
- Did you have to speak to anyone to discuss the installation either beforehand (eg. to discuss where it could be located) or during it?
- How did the installation go? Did it run smoothly? Were there any problems? We will explore the nature of these and any action that was taken by the customer as well as any response by SW or its sub-contractors
- Are you happy with the location of the meter? Are you able to read it yourself if you want to? Have you tried to do so? If not tried, or tried unsuccessfully, would it be helpful if someone showed you how to read your meter?
- What did you think of the attitude and behaviour of the workmen? Eg. were they courteous, did they take into account your need to be able to get in and out of your property, did they leave the area tidy after they finished installing the meter?
- Did you contact SW about the water meter either before it was installed or since? If so, how did you do this? What was the reason for getting in contact (explore reason)? Were SW able to resolve the issue/ were you satisfied with their response? If you didn't contact them, was that because there was no reason to do so or something else?
- Were you aware that you could request to be charged according to your water meter as soon as it was installed instead of waiting 3 months? If so, did you do this - why/why not? If unaware of this, would it have been helpful to have known this?

## General response to information

If they have it available, the MoH are asked to show the materials they have picked up/ received telling them about the water meter installation. If they have not kept any materials/ do not have them to hand, the interviewer will show the MoH the information pack, 'Your new water meter is here' and focus on this.

- (If materials are available), the bill-payer (or others if relevant) is asked to talk through how and when each piece was obtained. The interviewer checks who among the MoH have seen each piece/ read it
- (If the interviewer has to present the information pack) he/she will check whether the MoH have seen it, when it was received, how it arrived and whether they have read it
- The interviewer checks whether, in addition to these materials, the MoH have come across/read other communications, either before the meter was installed or around the time it was installed (interviewer to tick items on list below).

Before installation	Around the time of installation
leaflets in public places like libraries and post offices	signs on lampposts in the streets - blue (before installation) or pink (on day of installation)
Mobile Exhibition Unit (MEU)	local Customer Information Point
member of Southern Water's Customer service team (CST) calling at their home	information pack called 'Your new water meter is here'
information pack called 'Your new water meter is coming'	
Southern Water's website	
social media	

**This part of the discussion will firstly be grounded in what the MoH have come across/read. If the second information pack has to be shown to the MoH or they have one but have not read it and they are reading it for the first time, we will give them a few minutes to do this**

**(Interviewer – ask these questions in relation to any of those items ticked in the box above)**

- We will explore for the information pack in particular but other relevant items also
  - any piece of information that stands out and made an impact on them and why this was
  - how easy the information was to understand/ take in – how customer friendly it was
  - how useful/ helpful they thought the information was
  - anything that they had difficulty understanding and could have been clearer
  - anything that they found reassuring

## Response to specific information

- Thinking about the information that Southern Water has provided about how customers can save money by saving water and sometimes energy, has this been/ do you think it could be helpful to you?
- Is there anything else that Southern Water could do to help customers save water?
- Were you offered a Home Saver Check? If they were, we will explore
  - what did you understand this was?
  - did you take up the offer? Why/ why not?
  - if they did take it up, what it consisted of and how useful they found it (if they mention that a Benefits Entitlement check was offered as part of this, we will explore how useful they found this)
- How about help for those customers who cannot afford their metered bills? Explain if necessary that these include a payment plan, a benefits entitlement check, a social tariff i.e. a reduced tariff paid for by charging other customers a small amount more. What do you think of these?
- Are you aware of any additional help offered by SW for those whose bills go up as a result of having a water meter? Explore/ prompt and explore on the ‘changeover tariff’.
  - (If aware of it) What do you understand it is? Would you think about going on to this tariff if your bill is higher? Why/ why not?
  - (If not aware) Explain that this is to help customers who will have to pay more with a meter. SW reduce their bill for the first two years – an amount that does not have to be repaid - in order to make the change easier to cope with.
- Now that you have looked at the booklet ‘Your new water meter is here’ again, what do you expect to happen next – ie. after 3,6 and 9 months after installation? What information will you receive and what decisions must you make? (interviewer – please note if they need to refer to the booklet to answer this and tick off the information they mention)

	<b>What you will receive</b>	<b>What you must decide</b>
<b>About 3 months after installation</b>	A letter explaining that your water meter has been activated and you will be charged according to your meter reading	
<b>About 6 months after installation</b>	A letter letting you know how much water you have used in the last 3 months and how much your first bill is likely to be if you keep using the same amount of water	If you would like to opt in to the ‘changeover tariff’
<b>About 9 months after installation</b>	Your first metered bill showing the amount of water you have used over half the year and letting you know what your bill for the full year is likely to be if you keep using the same amount of water	If you would like to opt in to the ‘changeover tariff’

- As necessary, the interviewer will explain the staged process as shown here. What do you think about this approach of gradually moving customers on to a metered bill?
- How do you feel about the amount of information that has been provided in the pack? Does it seem enough, too much, about right? Do you have any outstanding questions?
- Are there particular things about which you would like to know more right now or which you think could be made clearer?

### **Attitude to Southern Water and learnings**

- Has the metering programme made you more aware of Southern Water? Has it changed your views of the company at all? In what way/ why not (follow up to find out what they thought/think of SW)?
- Has it made you think differently about what is involved in ensuring that this region has a reliable supply of water (If not think differently, has it made them more aware?)
- Other parts of the UK will also be undergoing compulsory metering programmes over the next few years and the Consumer Council for Water wants to learn from the experiences of customers like you. Is there anything that Southern Water could have done differently? Is there any other information that it could provide? Is there any other practical help that they could give?

## 5 Milestone 4: Post-‘switch-on’ and ‘forecast’ bill

### 5.1 Semi-structured telephone interviews

#### 5.1.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>		
<b>Family</b>	7	2
<b>Post-family</b>	1	2
<b>Retired</b>	1	2
<b>Vulnerable</b>	4	11

#### 5.1.2 Recruitment screener

##### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

- Q1. This research is looking at the experience of Southern Water customers who have had a water meter installed about 6 months ago and who have recently received a letter telling them how much their first bill is likely to be, based on how much water they have used. Can I first check how long ago your meter was installed?
- 1 any time June 2012 or later, ie up to 5 months ago **THANK & CLOSE**
  - 2 any time March, April or May 2012, ie up to 6-8 months ago

**SEE INSTRUCTIONS FOR POSSIBLE CASE WHERE IT WAS NOT POSSIBLE TO INSTALL A METER OR WHERE A MORE MODERN METER WAS EXCHANGED FOR AN OLDER MODEL**

- Q2. And have you since received a letter telling you how much your first bill is likely to be, based on how much water you have used?
- 1 yes
  - 2 no/don't know **THANK & CLOSE**

---

Q3. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household’s **water** bill(s)?

- 1 Yes **JOINTLY – GO TO Q3**
- 2 Yes **SOLELY – GO TO Q3**
- 3 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q4. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research or the water industry?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q5. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

- 1 yes
- 2 no **GO TO Q6**

---

Q6. Have you taken part in market research about anything to do with **water**?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q7. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS ‘E’. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

- 1. A
- 2. B
- 3. C1
- 4. C2
- 5. DE
- 6. Not stated **THANK & CLOSE**

**CHECK QUOTAS FOR SEG**

---

Q8. Can I check whether you are working or not and if so how much? **FOLLOW UP Q6 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- 1 Working full-time
- 2 Working part-time
- 3 Full-time home maker
- 4 Not working
- 5 Taken early retirement
- 6 Retired at the state retirement age or later
- 7 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q9. Note Gender

- 1. Male
- 2. Female

---

Q10. Which of the following age groups do you fall into?

**CODE AGE BAND BELOW**

- 1 18-34 **Pre family**
- 2 35-40 **Pre family**
- 3 41-54 **Post family**
- 4 55 – 64 **Post family or retired**
- 5 65+
- 6 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**



---

Q11. Do you have any children?

1 yes

2 no **Pre family**

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q12. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q13. How many people aged 17 or over live in your household?

---

Q14. How many children aged 16 or under live in your household?

**Pre-family: no children 16 or under living with them – check because could be partner’s children and then they would qualify as a family)**

**Family: at least 1 child aged 16 and under living in the family home**

**Post-family: no children aged 16 or under living with them**

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q15. Do you or anyone in your household have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q16. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q17. When it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

---

Q18. Do you have access to the Internet? This could be at home, at work, at the library or at a friend or relative's house?

1 yes

2 no

---

Q19. How often do you use the Internet to find information you need? Do you use it regularly, occasionally, rarely or never?

1 regularly

2 occasionally

3 rarely

4 never

**PLEASE INCLUDE SOME CUSTOMERS WHO DO NOT HAVE ACCESS TO THE INTERNET OR HAVE ACCESS BUT NEVER USE IT OR USE IT RARELY**

### **Invitation: Telephone depth**

Thank you for answering those questions. We would be grateful if you could spare a further 30 minutes, to take part in an interview over the telephone with one of our research team at a date and time that is convenient for you. None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will send you a cheque/voucher for £10 to thank you for taking part. Would you be able to take part in our research?

**PERSUADE AND REASSURE.**

1. yes **TAKE CONTACT DETAILS (PAGE 1) AND MAKE APPOINTMENT**

2. no **THANK AND CLOSE**

**NB. IF THE CUSTOMER HAS SOME FORM OF DISABILITY, PLEASE USE YOUR DISCRETION IN ASKING WHETHER THIS MIGHT AFFECT HOW WE CONDUCT THE INTERVIEW**

**THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH**

### 5.1.3 Discussion guide

#### **Introductions**

- The research is being carried out on behalf of the Consumer Council for Water which is the organisation that represents water consumers.
- It is interested in talking to SW customers about their experience of, and views on, the water company's programme of installing meters for all its customers.
- Reassure about anonymity of response
- Confirm that the interview will last about 30 mins and that he/she will receive £10 as a gesture of thanks – check name and address to which it should be sent.
- Check that respondent has had a meter installed about 6 months previously and that they have recently received a letter telling them how much their first bill is likely to be. Moderator to explain we are going to talk about this shortly but to begin with, we are going to briefly look at what happened up until the letter arrived/

#### **Experience of installation**

- What was your experience of having a water meter fitted? Were you at home at the time the meter was installed? Were you aware of it being installed?

- How did the installation go? Did it run smoothly? Were there any problems? Explore the nature of these and any action that was taken by the customer as well as any response by SW or its sub-contractors
- Overall, was the installation process better or worse than you expected?

### Information around installation

- What do you think about how Southern Water informed customers about the metering programme? Did they provide too much information or not enough, or did they get it about right? Why do you say that?
- If not enough, what else should they have told customers about? How might they have done this?
- If too much, what could they have done without?
- What information can you recall seeing or receiving **leading up to installation**?

**Note to moderator** – prompt as necessary on any advertising in local media, Mobile Exhibition Unit at local venues, blue signs on lamp posts, a pack of information through the letterbox called ‘Your water meter is coming’, SW’s Customer Service team coming to the door, the link in the booklet to SW’s website to find out more

- For each item recalled, explore what they thought of it (eg. was it customer friendly?), how useful it was, whether they contacted SW as a result and the outcome of this
- What information can you recall seeing or receiving at **the time of installation**?

**Note to moderator** – prompt as necessary on local Customer Information Point, pink signs on lamp posts, a pack of information through the letterbox called ‘Your water meter is here’, the link in the booklet to SW’s website to find out more

- For each item recalled, explore what they thought of it (eg. was it customer friendly?), how useful it was, whether they contacted SW, if so how, and the outcome of this
- Overall, how do you feel about the level of support provided by SW leading up to and during installation of the meter?
  - how would you rate the level of support provided by SW on a scale from 0-10 where 10 is an excellent level of support?

### Response to ‘switch’ letter

- Do you recall receiving a letter from Southern Water about 3 months ago telling you that your water meter had been turned on? Were you surprised to receive this or had you been expecting it – (ie. were you aware that your meter was not turned on as soon as it was installed?)
- Did you read it?
  - If they did, explore whether they found it easy to read and generally customer friendly
  - If not, why not? Explore whether this is typical of how they deal with their post or whether there was something about this letter that meant they did not read it. eg. how customer friendly it looked?
- If at least briefly looked at, can you remember what the letter told you?

**note to moderator** – see sample letter; it includes where meter is located, meter reading when it was turned on, phone and website details in case of questions, explanation that another letter

will arrive in 3 months giving meter reading so that the customer can see how much water they are using and how much their bill is likely to be, any sums owing from before the meter was turned on, bills every 6 months, how to set up a direct debit for payment

- Did you do, or try to do, anything as a result of receiving this letter – eg. phone up, go on website, arrange a direct debit?
  - reasons for contact
  - whether it was possible to make contact
  - how helpful the sources were, were their questions answered, did they put the direct debit in place efficiently?

### **Response to letter three months after switch (6 months after installation)**

- When did you receive the letter from Southern Water telling you how much water you are using and what your first bill on a meter is likely to be, based on this level of use?
- Were you surprised to receive this or had you been expecting it – for example, based on the 'switch' letter or what you had read elsewhere?
- Did you read it?
  - If they did, explore whether they found it easy to read and generally customer friendly.
  - If not, why not? Explore whether this is typical of how they deal with their post or whether there was something about this letter that meant they did not read it eg. how customer friendly it looked?

**note to moderator** – see sample letter; it includes similar information to the 'switch' letter ie. where meter is located, meter reading when it was turned on, phone and website details in case of questions, how to pay by direct debit.

It also shows the meter reading after 3 months (and the volume of water used), the average daily water usage for the household as well as the average usage per person.

It explains that the first metered bill will arrive in 3 months and based on current usage, what this bill will be. It gives the total spend for the year (ie. double the 6 month amount) and how this compares to their old bill charged on the basis of rateable value.

The letter poses the question of whether the customer will have trouble paying and if so, suggests they call a phone number or go to the website for advice on saving water. If they still think they cannot reduce the amount of water they use and are unable to pay, they can go on to the changeover tariff. Information is provided on the back of the letter about how much they would pay under this tariff over 3 years if they keep using the same amount of water. They can opt into the tariff on the same number as the water saving advice line.

### **Impact of letter on water usage**

- **If at least briefly looked at**, can you remember what the letter told you? After spontaneous recall, as necessary, prompt on whether they recall **specific information it gave them about their level of water use**
  - meter reading after 3 months
  - total volume of water used
  - average daily water usage for the household

- how this compares to the average usage per person per day
- likely half-year bill
- likely full year bill
- how this compares to the old way of working out their bill.
- How useful was this information? What was most useful and why?
- How did you react to this information – was it reassuring, worrying – in what way? (ie. is your bill likely to go up or down?)
- Was it helpful to have this information before you receive your first bill?
- The letter tells you the average daily water usage for your household. Did you work out whether this was above or below the average for all customers? How did you do this (presumably by multiplying the number of people by 150 and comparing it to their use)? What was your reaction to this information?
- Did any of this information make you think about your level of water usage?
- **For those whose bills are likely to rise** Did it prompt you to try and use less water yourself, or as a household? How, if at all, have you/ your household changed your behaviour since receiving this letter? Explore whether any changes in behaviour started earlier eg. when the meter was installed.
  - As relevant, what actions have you tried to take in your household to reduce your water usage? Have you experienced any difficulties in doing this (such as resistance from members of the household?)
  - Which actions do you expect to have the greatest effect on your water bill?
- For those whose bills are likely to fall, do you think you might use more water?

**If the customer has not read the letter and has no idea of its contents**, explain that it firstly gives information about how much water the household has used since the meter was turned on and on this basis predicts what the first water bill will be for 6 months usage and the second bill after 12 months. This is so that customers can see whether their bill is likely to go up or down and from this, decide whether to adjust their water use.

- How useful do you think it is to be given this information before you get your first bill?
- Do you expect to find that your bill will go up or go down?
- Now that you know the letter provides this information, might you take another look at it if you have kept it?
- What might you do if you find your bill is likely to go up? Will this make you think differently about how you use water?
- If they have tried or anticipate trying to cut down their use of water, explore
  - when any changes in behaviour were put in place or might be put in place eg. when the meter was installed, when they get the first bill.
  - what actions have been taken/ might you take in your household to reduce your water usage?
  - which actions do you expect to have the greatest effect on your water bill?
- What might you do if your bill is lower - will this make you think differently about how you use water? Explore what they might do and the reasons for this.

## Impact of letter on perceptions of affordability

- If letter was at least briefly looked at Now prompt on what they recall about what the letter said about advice you could get if you could not afford your new bill – prompt as necessary on
  - advice about water saving
  - the changeover tariff – how can it help customers who find it difficult to pay higher bills?
  - other payment options like Direct Debit or instalment payments.
- Did you do or try to do anything as a result of receiving this letter – eg. seek advice, opt in to the changeover tariff, phone up with a question, go on the website, arrange a direct debit? These contacts will be explored for
  - reasons for making contact
  - ease of making contact
  - how helpful the sources were
  - were their questions answered or things put into place efficiently?
- If your bill is predicted to go up as a result of being metered and you have not opted into the changeover tariff, why is that?
- **If the customer has not read the letter and has no idea of its contents**, explain that the letter tells customers how they can get advice on how to save water
  - is this something that they think they would find useful?
- It also provides information about a changeover tariff for those households whose new bill is higher than the old and who find it difficult to adjust to the new amount. This means that they will pay less than they might have done for the first two years.
  - is this the first time they have heard about this (if not, where else)? Again, how useful is this information? If your bill is predicted to go up as a result of being metered, do you think you will opt into the changeover tariff? If not, why not?
- **Ask all** Do you think that Southern Water offers any additional help for those who cannot afford their metered bills? (Note to moderator: this includes payment plans, a Home Saver Check to see if they could save water and energy, a benefits entitlement check, a social tariff i.e. a reduced tariff paid for by charging other customers a small amount more).

## Attitude to the metering programme and Southern Water

### READ OUT AS RELEVANT:

Southern Water is carrying out a five year water metering programme. About 65% of Southern Water's customers now have a water meter and that proportion is increasing each year. Southern Water has installed 250,000 meters to date and will have completed 500,000 installations by 2015.

- How do you feel about SW's metering programme? What do you see as the good things about it? And the not so good?
- Why do you think it is being carried out? How do you feel about this?

**If the customer is not aware of why it is being carried out or their explanation differs from that below** – Explain that it is because current levels of water use mean that water resources, such as rivers, are under serious pressure. This is likely to get worse with population growth and climate change. Metering means that customers will be more aware of the water they use because they pay for what they use. It is also fair for everyone to be billed in the same way and it should also result in customers using less water.

- How do you feel about the programme in this context?
- Has the metering programme changed what you think of Southern Water? Explore what they thought before and after.
- Explain that the CCWater and SW want to learn from customers' experience. Is there anything else that you feel you should have been told about the metering programme?
- Do you feel that there is anything else that SW could have done to
  - improve communications with their customers about the metering programme
  - improve their arrangements for installing meters
  - help customers save water
  - help customers adapt to having a water meter and being billed based on their water usage?

## 6 Milestone 5: Post-receipt of first bill

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### 6.1 Qualboard

#### 6.1.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>	2	
<b>Family</b>	1	1
<b>Post-family</b>	3	1
<b>Retired</b>	2	1
<b>Vulnerable</b>		

#### 6.1.2 Recruitment screener

##### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

---

Q1. Can you tell me who supplies your water and sewerage service?

1. Southern Water – both water and sewerage **CONTINUE**
2. Southern Water – water **CONTINUE**
3. Southern Water – sewerage **THANK & CLOSE**
4. Other **THANK & CLOSE**
5. Don't know **THANK & CLOSE**

---

Q2. This research is looking at the experience of Southern Water customers who had a water meter installed about 9 to 12 months ago and who have recently received their first metered bill with charges worked out on how much water they have used. Can I first check how long ago your meter was installed?

- 1 any time April 2012 or later, ie up to 8 months ago **THANK & CLOSE**
- 2 any time Dec 2011, Jan to March 2012, ie up to 9 to 12 months ago

---

Q3. And have you received your first metered bill with charges worked out on how much water you have used?

- 1 yes
- 2 no/don't know **THANK & CLOSE**
- 3 other (eg 2<sup>nd</sup> metered bill) **THANK & CLOSE**



---

Q4. And please can you tell me whether this bill is for more, less or about the same amount as bills you had before your water meter was installed?

- 1 more
- 2 less
- 3 stayed the same
- 4 Don't know **THANK & CLOSE**

**EQUAL SPREAD OF EACH CATEGORY**

---

Q5. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household's **water** bill(s)?

- 1 Yes **JOINTLY – GO TO Q6**
- 2 Yes **SOLELY – GO TO Q6**
- 3 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q6. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research, the Environment Agency or the water industry?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q7. Do you have access to a computer at home, or work, which you use regularly so that you could be involved in an online discussion?

- 1 yes
- 2 no **THANK & CLOSE**

---

Q8. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

- 1 yes
- 2 no **GO TO Q10**

---

Q9. Have you taken part in market research about anything to do with **water**?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q10. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title?

**IF SELF-EMPLOYED: ASK IF MANUAL/NON-MANUAL, SKILLED/QUALIFIED OR NOT, NUMBER OF EMPLOYEES – THEN LOOK UP SELF EMPLOYED TABLE**  
**IF MANAGER/EXEC: ASK FOR INDUSTRY SECTOR, NUMBER OF EMPLOYEES IN COMPANY AND MANAGEMENT STATUS**  
**IF RANK/GRADE (CIVIL SERVANT, NURSING, MILITARY, NAVY, POLICE ETC.) RECORD RANK/GRADE SPECIFICALLY**  
**IF PENSIONERS: ASK IF STATE (GRADE "E") OR PRIVATE/OCCUPATIONAL PENSION (GRADE ON PREVIOUS OCCUPATION)**  
**IF UNEMPLOYED: IF MORE THAN 6 MONTHS AGO (GRADE "E"), IF LESS THAN 6 MONTHS AGO (GRADE ON PREVIOUS OCCUPATION)**

**WRITE IN AND CODE SEG .....**

- 1. A
- 2. B
- 3. C1
- 4. C2
- 5. DE
- 6. Not stated **THANK & CLOSE**

**CHECK QUOTAS FOR SEG**

---

Q11. Can I check whether you are working or not and if so how much? **FOLLOW UP Q10 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- |                        |  |
|------------------------|--|
| 1 Working full-time    | 4 Not working                                  |
| 2 Working part-time    | 5 Taken early retirement                       |
| 3 Full-time home maker | 6 Retired at the state retirement age or later |
|                        | 7 Refused                                      |

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q12. Note Gender

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

Q13. How old are you?

**CODE AGE GROUP BELOW**

- |         |           |
|---------|-----------|
| 1 18-34 | 4 55 – 64 |
| 2 35-40 | 5 65+     |
| 3 41-54 | 6 Refused |
- 

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q14. Do you have any children?

- |       |      |
|-------|------|
| 1 yes | 2 no |
|-------|------|
- 

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q15. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q16. How many people aged 17 or over live in your household?

Q17. How many children aged 16 or under live in your household?

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q18. Do you or anyone else in the household have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q19. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q20 Finally, when it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

**RECRUIT FOR QUOTA. GO TO INVITATION**

**Invitation: Qualboard**

Thank you for answering those questions. We would be grateful if you could spare 10 to 15 minutes each day of the next three days, to take part in an online discussion with one of our research team. None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will send you an Amazon voucher for £10 to thank you for taking part. Would you be able to take part in our research?

**PERSUADE AND REASSURE.**

- 3. yes **TAKE CONTACT DETAILS (SEE BELOW)**
- 4. no **THANK AND CLOSE**

If order for us to communicate with you about these activities, can you give us your email address and a telephone contact number?

---

Q20. Can you please tell me your email address (please ensure that your web account will accept this email and not treat it as 'spam').

---

Q21. And please can you tell me your telephone contact number

---

Q22. And finally, please can you tell me your name? (first name and surname)

**THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH**

### 6.1.3 Discussion guide

Hello, my name is Jo and I work for an independent market research company called Accent. We are conducting research for the Consumer Council for Water, the body that represents water consumers. Thank you very much for agreeing to help us with this research.

The research is being conducted in accordance with the Code of Conduct of the Market Research Society (MRS) and also with the Data Protection Act, with whom Accent is registered. This means that everything you say during this discussion will be confidential and will not be attributed to you personally, so please express your views frankly.

The online discussion will take place over 3 days and you will be asked to log in each day and answer a few questions about the issues in hand and, we would encourage you to engage further in the debate with your fellow panellists. It is likely that it will take 10 to 15 minutes each day to answer the questions but you will also be required to take a bit of time to look at and think about various pieces of communication that will be shown to you.

Can I stress that we are looking for your personal views. There are no right or wrong answers. I hope you will all contribute to the discussion.

Please feel free to discuss these issues with the other people taking part in the discussion. We want to encourage a 'healthy debate'.

#### *Day One – General thoughts and feelings towards having a water meter*

We're doing some research to find out about your experiences of having a water meter and wish to understand what you felt about some of the communications you have received and what impact, if any, this has had on the way you use water. We are especially interested in gathering your views about the new metered bill you have received and what difference this might have made to the way water is used in your household. Please answer as fully as you can and, if you like, comment on what other people have said.

- First of all, can I just check what information you have received from Southern Water? Do you remember receiving a forecast bill.
- Do you think that everyone in the household is aware that a water meter has been installed?
- Having had the water meter for about 9 months, how do you feel about having a water meter? Has it been a good or bad experience for the household? Please can you give your reasons.
- Why do you think all the households in your area are being fitted with a water meter?

Provide the following explanation

The metering programme is needed because current levels of water use mean that water resources, such as rivers, are under serious pressure and this is likely to get worse with population growth and climate change. Metering means that customers will be more aware of the water they use because their y charges depend on how much water they use

- How do you feel about it now you know the reason? Do you think it's a fairer way of charging?

- Has having a water meter made any difference to the way you use water? If so, what difference has it made? Would you say your water use has increased, decreased or stayed about the same?
- *If no difference* - Why do you think that is?
- *If a difference* - And when did this change – was it after installation, once the meter was switched on or when you received a forecast of what your first bill might be?
- Have other members of the household felt under pressure to use less water? Where did the pressure come from?
- Have you tried to encourage everyone in the household to be more aware and use less water? How have you tried to do that and how successful have you been?
- What concerns, if any, did you have about having a water meter? When did you first have those concerns? Why did you have those concerns and have they been proven? **Moderator note high level feedback about higher bills and/or supply pipe leakage**
- Did you do anything or talk to someone about those concerns?
- Have any new issues or concerns emerged as a result of going on to a water meter?
- Prior to having the meter installed and at the time of installation, what information do you remember receiving from Southern Water?
  - What do you recall? How much of it did you read?
  - What were the key messages that came through?
  - Was there anything that stood out for you? If so, what?
  - Did everything happen as you expected it to?

Thank you for your responses today. I hope you found that a valuable experience Tomorrow, we are going to look at some specific actions you may have taken with you water use. We will also have a general discussion about your new metered water bills. It might also be a good idea to talk with other people in your household to get their views too.

### *Day Two – Changing the way you use water and how your water bills have changed since going on to a water meter*

So, yesterday we discussed what your general thoughts and feelings about having a water meter, some of the concerns you may have had and how this changed the way you use water, if at all. Today, we are going to look in more detail at some of the specific actions you may have taken to change your water usage as well as your initial thoughts about the new metered bills.

- What actions have you tried to take in your household to reduce your water usage? What difficulties have you experienced in doing this, if any?
- What effect did the information previously provided by Southern Water have on you? Did it make you think about your water usage? Was there any particular tip or suggestion that made an impact on you?
- Have you started using/fitted appliances which use less water, or water saving devices? (eg water efficient washing machines, aerated shower heads, tap inserts which aerate the water and reduce the rate of flow, save-a-flush or similar which go in the toilet cistern, water butts).
- What made you decide to do these things in particular?

- Did you think about using/fitting other appliances/fitting that could use less water but decide not to follow them up? If so what and why?
- Have you managed to keep up these activities which use less water? How easy or difficult have they been to carry on? Was it easy at first and become harder or the other way round?
- Can I just check whether you remember receiving the forecast letter about 6 months after the water meter was installed? Do you remember what information it provided? Was it clear/did you understand it?
- What did you think of this? Did it make you act any differently? If so, how? **Download attachment of forecast bill**
- Now that you have seen this, do you remember it? If not, would it have been helpful to have seen one? What would you have done differently, if anything
- How did your first metered bill compare with the forecast that had been provided after 6 months?
- Was it more or less than you expected, or was it what you were expecting?
- **If more than your old bills before the water meter**, how do you feel about the increase? Why do you think that might be?
- Do you think the size of your bill will make you think again about how you use water? If so, how and why? What, if anything, will you/your family do differently?
- **If less than your old bills before the water meter**, how do you feel about the decrease? Why do you think your bill is less than you were expecting? Have you/your family changed the way you use water? If so, how?
- Is your water bill easier to afford now that you have had a water meter installed? do you think there is anything you could do make it easier to afford? What? If you think there is nothing you can do, why do you think that? **Note to moderator - this could include using less water or agreeing payment arrangements with Southern Water**
- Do you think that Southern Water offers any help for those who cannot afford their metered bills? What do you think they offer?
- Have you asked whether any help is available to pay your new metered bills? If possible, can you share with us what you found out? How helpful did you find this?

Thank you for all your valuable insights. That is the end of today's questions. Tomorrow is the final day and we will have a bit more of a detailed discussion about your new metered bills and what impact, if any, it has had on your household

### *Day Three – More detailed investigation of bill: the clarity of it and what impact it has had on your household*

We finished off yesterday by talking about your new metered bills. Today, we are going to discuss what you think about the look and feel of the new metered bill and any whether you did anything as a result of receiving the bill and the letter from Southern Water

- What did you think about the look and feel of the metered bill you received from Southern Water?
  - How much of it did you read? What was good/bad about it? Was it customer friendly?
- Was there anything that you particularly noticed? If so, what?

- Do you recall any of the following:
  - the chart showing how your water use compares with other customers ;
  - the case study showing how a family had saved water;
  - the advice on cutting down on water use.
- For any of the above things that you read/noticed, how useful and helpful was the information? Why? What was most useful? Was there anything you didn't fully understand?
- Are any of these items of information going to make you do things differently? If so, which? And what do you think you will do differently?
- Do you recall receiving a letter headed 'It's been 6 months since we turned on your water meter'?
- If so what did you think of it? How much of it did you read? How useful was it? And how helpful was it?
- Did you do or try to do anything as a result of receiving this letter – eg. seek advice, opt in to the changeover tariff, phone up with a question, go on the website, arrange a direct debit?
  - what were your reasons for making contact
  - how easy was it to make contact
  - how helpful were the various sources of information
  - were your questions answered or things put into place efficiently?
  - If letter not read or recalled, why not? Is this how you tend to deal with other correspondence (ie save them for later) or was there something about this particular letter/bill that meant you did not read it
- If you are paying by Direct Debit, did you receive adequate and timely notification about your new direct debit payments? Was the explanation clear about how your payments may be adjusted if your metered bills end up being more than your bills before?

Provide the following explanation

Moving forward, you will be receiving another bill in about 6 months time. This will compare your water usage to the first 6 months and if your water consumption has increased by more than 20% since your first bill you will receive a purple bill. Moderator note – ***show example of purple bill.***

- What would you feel if you received one of these? Would you be surprised or concerned or would it be something that you could explain? Is it useful to know how much your water use has increased by?
- If surprised, what might you do if you received one of these bills?
- What do you think might be the reason for such an increase in water use? If you did receive a purple bill would it prompt you to think about how much water you use? Why? How you might you respond?
- Finally, has the metering programme made you more aware of Southern Water and the services they provide? Has it changed your views of the company at all? In what way/ why not
- Overall, what do you feel about the information and support that you have received throughout the from an un-metered to a metered supply – from your first notification that you would be having a meter to the first metered bill you got

We will close there, thank you for all your very valuable contributions.

## 6.2 In-home depth interviews

### 6.2.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>	2	
<b>Family</b>		
<b>Post-family</b>	2	1
<b>Retired</b>	1	
<b>Vulnerable</b>	1	3

### 6.2.2 Recruitment screener

#### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

---

Q1. This research is looking at the experience of Southern Water customers who had a water meter installed about 9 to 12 months ago and who have recently received their first metered bill with charges worked out on how much water they have used. Can I first check how long ago your meter was installed?

1 any time April 2012 or later, ie up to 8 months ago **THANK & CLOSE**

2 any time Dec 2011, Jan to March 2012, ie up to 9 to 12 months ago

**SEE INSTRUCTIONS FOR POSSIBLE CASE WHERE IT WAS NOT POSSIBLE TO INSTALL A METER OR WHERE A MORE MODERN METER WAS EXCHANGED FOR AN OLDER MODEL**

---

Q2. And have you received your first metered bill with charges worked out on how much water you have used?

1 yes

2 no/don't know **THANK & CLOSE**

3 other (eg 2<sup>nd</sup> metered bill) **THANK & CLOSE**

---

Q3. And please can you tell me whether this bill is for more, less or about the same amount as bills you had before your water meter was installed?

1 more

2 less

3 stayed the same

4 Don't know **THANK & CLOSE**

**EQUAL SPREAD OF EACH CATEGORY**



---

Q4. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household’s **water** bill(s)?

- 1 Yes **JOINTLY – GO TO Q5**
- 2 Yes **SOLELY – GO TO Q5**
- 3 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q5. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research or the water industry or the Environment Agency?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q6. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

- 1 yes
- 2 no **GO TO Q7**

---

Q7. Have you taken part in market research about anything to do with **water**?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q8. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS ‘E’. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

- 1. A
- 2. B
- 3. C1
- 4. C2
- 5. DE
- 6. Not stated **THANK & CLOSE**

**CHECK QUOTAS FOR SEG**

---

Q9. Can I check whether you are working or not and if so how much? **FOLLOW UP Q8 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- 1 Working full-time
- 2 Working part-time
- 3 Full-time home maker
- 4 Not working
- 5 Taken early retirement
- 6 Retired at the state retirement age or later
- 7 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q10. Note Gender

- 1. Male
- 2. Female

---

Q11. Which of the following age groups do you fall into?

**CODE AGE BAND BELOW**

- 1 18-34
- 2 35-40
- 3 41-54
- 4 55 – 64
- 5 65+
- 6 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q12. Do you have any children living at home?

1 yes

2 no Pre family

---

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q13. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q14. How many people aged 17 or over live in your household?

Q15. How many children aged 16 or under live in your household?

**Pre-family: no children 16 or under living with them – check because could be partner’s children and then they would qualify as a family)**

**Family: at least 1 child aged 16 and under living in the family home**

**Post-family: no children aged 16 or under living with them**

---

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q16. Do you or anyone in your household have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q17. Do you receive any of the following benefits? **Tick all that apply**

- a Attendance Allowance
- b Carer's Allowance
- c Child Tax Credit
- d Council Tax Benefit
- e Disability Living Allowance
- f Housing Benefit
- g Income Support
- h Jobseeker's Allowance
- I Working tax credit
- J None of these

---

**PLEASE AIM TO ACHIEVE 6 WHO ARE VULNERABLE BASED ON PHYSICAL IMPAIRMENT OR BENEFITS**

---

Q18. When it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

**PLEASE AIM TO ACHIEVE 2 TO 3 WHO STRUGGLE**



what they use. How do you feel about it now you know the reason? Do you think it's a fairer way of charging? If so, in what way (as necessary, check whether it's fairer because you pay for what you use and/or because everyone has to have a meter)

- Has having a water meter made any difference to your lives/routine. If so, what difference has it made? If no difference. Why do you think that is? Is it because you are already careful or perhaps you do not see the need to? So would you say your water use has stayed about the same?
- **If a difference (*Moderator - try and establish from other members of household before the bill payer*)** - And when did this change– was it after installation, once the meter was switched on or when you received a forecast of what your first bill might be?
- Now ask bill payer to confirm when he/she thinks things started to happen differently
- Is there any sense from other members of the household that they were under pressure to use less water? Where did the pressure come from – other people in household, self? If so, how did you respond to that pressure and what impact did it have on your behaviour? Do you think you will keep it up?
- What effect did the information provided by Southern Water have on you. Did it make you think about your water usage?
- If the bill-payer has tried to encourage everyone to be more aware and use less water, what has he/she tried to do and how successful has he/she been? What do other MoH think of his/her efforts? Was he/she right to try and make those changes? Why/why not?
- What concerns, if any, did you have about having a water meter? When did you first have those concerns? And have those concerns been proven? ***Moderator - note high level feedback about higher bills and/or supply pipe leakage eg***
  - what were you expecting
  - why were you expecting this
  - and did you do anything or talk to someone about those concerns
- Have any new issues or concerns emerged as a result of going on to a water meter?
- Prior to having the meter installed and at the time of installation, what information do you remember receiving?
  - What do you recall? How much of it did you read?
  - What were the key messages that came through?
  - Was there anything that particularly impacted you? If so, what?
  - Did everything happen as you expected it to?

### **Water Usage Customer Behaviour**

- Having had the meter for 9 months, how has your water usage changed, if at all?
  - Did you/members of the household expect to change the way you use water before receiving your first bill? If so, how?
  - Are you personally/as a family using less, more or the same prior to having a water meter? If using less, what are you doing differently?
  - How did the information from Southern Water influence your behaviour?
  - As relevant, what actions have you tried to take in your household to reduce your water usage? Have you experienced any difficulties in doing this (such as

resistance from members of the household? Or simply forgetting/finding it difficult to form a new habit/routine)

- Have other members of the household tried to use less water in any way? What kind of things have you been doing to achieve this?
- Have you started using/fitted appliances which use less water, or water saving devices? (Such as water efficient washing machines, shower head, tap inserts which aerate the water and reduce the rate of flow, save-a-flushes or similar which go in the toilet cistern, water butts...).
- And why are you doing these things in particular?
- Have you managed to keep up these activities? How easy or difficult have they been to carry on? Was it easy at first and become harder or the other way round?

### **Meter Issues/Problems**

- Have you had any problems with the meter itself? If so, what are they?
- Any problems with leaks? If so, what action did you take/Southern Water take?
- Have you tried reading the meter yourself? If so, how easy or difficult did you find it to do. If not, is this something you would want to do? Why? How would you use the information?

### **Customer Perceptions of Bill/Affordability**

- Can I just check whether you remember receiving the forecast bill about 6 months after the water meter was installed? Do you remember what information it provided? Was it clear/did you understand it?
- What did you think of this? Did it make you act any differently? If so, how?

Note to moderator – if customer cannot recall please show them an example of one.

- Now that you have seen this, do you remember it? If not, would it have been helpful to have seen one. What would you have done differently, if anything
- How did your first metered bill compare with the forecast that had been provided after 6 months?
  - Was it more or less than you expected, or was it what you were expecting?
  - **If more than your old bills before the meter**, how do you feel about the increase? Why do you think that might be?
  - Do you think the size of your bill will make you rethink and change your water use? If so, how and why? What, if anything, will you/your family do differently?
  - **If less than your old bills before the meter**, how do you feel about the decrease? Why do you think your bill is less than you were expecting? Have you/your family changed your water consumption habits? If so, how?
  - How important is it for you/your family to reduce your water consumption (further)? Why?
  - Which actions do you expect to have the greatest effect on your water bill?
- Is your water bill more affordable now that you have had a water meter installed?

- If not, what things could you do to make it more affordable Note to moderator - this could include using less water or agreeing payment arrangements with Southern Water
- What did you think about the look and feel of the metered bill you received from Southern Water?
  - How much of it did you read?
  - What was good/bad about it?
  - Was there anything that you particularly noticed? If so, what?
  - Do you recall any of the following:
    - the comparison chart on their bill;
    - the case studies;
    - the advice on cutting down on water use.
  - For any of the above things that were read/noticed, how useful and helpful was the information? Why? What was most useful?
  - Are any of these items of information going to make you do things differently? If so, which? And what do you think you will do differently?
  - And did you read the information about where help with bills can be found? If so, what were the key messages that were being communicated?
- Do you recall receiving a letter headed 'It's been 6 months since we turned on your water meter'?
- If so what did you think of it? How much of it did you read? How useful was it? And how helpful was it?
- Did you do or try to do anything as a result of receiving this letter – eg. seek advice, opt in to the changeover tariff, phone up with a question, go on the website, arrange a direct debit? Ask the following
  - reasons for making contact
  - ease of making contact
  - how helpful were the sources
  - were your questions answered or things put into place efficiently?
  - If not, why not? Explore whether this is typical of how they deal with their other bills or whether there was something about the bill that meant they did not read it eg. how customer friendly it looked?
- Overall, did you find the bill easy to read and generally customer friendly? And the letter?
- **Ask all** Do you think that Southern Water offers any additional help for those who cannot afford their metered bills? (Note to moderator: this includes the Change Over tariff, payment plans, a Home Saver Check to see if they could save water and energy, a benefits entitlement check, a social tariff i.e. a reduced tariff paid for by charging other customers a small amount more)
  - Explore whether anyone has taken up one of these offers and why? Is it because their bill is higher and therefore a more significant part of their household budget or were they already struggling with their water bills.

- If they didn't take these options up can you please ask why – was it because they are still able to afford the bill/didn't think they could still access it /wanted to see what next bill looked like?

**Moderator - note if they have opted into Changeover tariff as they should have received a 'Changeover statement'. If so, ask**

- What did you think of it? How much of it did you read? How useful was it? And how helpful was it? Was it clear & easy to understand?

**Moderator - note mention of those on Direct Debit**

- Did you receive enough notification about your new direct debit payments?
- And was the explanation clear about how your payments may be adjusted if you have ended up paying more on your metered bills? *Ask respondent to explain?*
- Do you think you might take any of these other options up in the future
- Moving forward, you will be receiving another bill in about 6 months time. This will compare your usage to the first 6 months and if your water consumption has increased by more than 20% since your first bill you will receive a purple bill. **Moderator note – show example of purple bill**
- What would you feel if you received one of these? Would it be a surprise or would it be something that you could explain? Is it useful to know how much your water use has increased by?
- If surprised, what would you do if you received one of these bills? Would you call Southern Water or perhaps go onto their website?
- What do you think might be the reason for the increase in water use? EG someone else has moved into the household, or had tried to save water for the first bill but it was less than expected and have now relaxed
- If you did receive a purple bill would you think about how much water you use and how you might make savings?

**Attitude to Southern Water & Learnings**

- Has the metering programme made you more aware of Southern Water and the services they provide? Has it changed your views of the company at all? In what way/ why not (follow up to find out what they thought/think of SW)?
- Has it made you think differently about what is involved in ensuring that this region has a reliable supply of water (If not think differently, has it made them more aware?)
- Other parts of England will also be undergoing compulsory metering programmes over the next few years and the Consumer Council for Water wants to learn from the experiences of customers like you. Is there anything that Southern Water could have done differently? Is there any other information that it could provide? Is there any other practical help that they could give?
- Overall, what do you feel about the information and support that has been provided throughout the transition from an unmetered to a metered supply – this would include the process from when you first received notification that you would be having a meter to the first metered bill you got
- Finally, is there anything about having the water meter/metered bills which you would like to ask/know more about – perhaps if there is something that remains unanswered or you are not clear on?

## 7 Milestone 6: Post-receipt of second bill

---

### 7.1 Qualboard

#### 7.1.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>		
<b>Family</b>	5	4
<b>Post-family</b>	1	
<b>Retired</b>	1	1
<b>Vulnerable</b>		

#### 7.1.2 Recruitment screener

##### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

---

Q1. Can you tell me who supplies your water and sewerage service?

1. Southern Water – both water and sewerage **CONTINUE**
2. Southern Water – water **CONTINUE**
3. Southern Water – sewerage **THANK & CLOSE**
4. Other **THANK & CLOSE**
5. Don't know **THANK & CLOSE**

---

Q2. This research is looking at the experience of Southern Water customers who had a water meter installed about 12 - 15 months ago and who have recently received their second metered bill with charges worked out on how much water they have used. Can I first check how long ago your meter was installed?

- 1 any time Feb 2012 or later, ie up to 11 months ago **THANK & CLOSE**
- 2 any time Jan 2012, Oct to Dec 2011, ie up to 12 to 15 months ago

---

Q3. And have you received your second metered bill with charges worked out on how much water you have used?

- 1 yes
- 2 no/don't know **THANK & CLOSE**



---

Q4. And please can you tell me whether your new metered bills are more, less or about the same amount as the bills you had before your water meter was installed?

- 1 more
- 2 less
- 3 stayed the same
- 4 Don't know **THANK & CLOSE**

**EQUAL SPREAD OF EACH CATEGORY**

---

Q5. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household's **water** bill(s)?

- 1 Yes **JOINTLY – GO TO Q6**
- 2 Yes **SOLELY – GO TO Q6**
- 3 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q6. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research, the Environment Agency or the water industry?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q7. Do you have access to a computer at home, or work, which you use regularly so that you could be involved in an online discussion?

- 1 yes
- 2 no **THANK & CLOSE**

---

Q8. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

- 1 yes
- 2 no **GO TO Q11**

---

Q9. Have you taken part in market research about anything to do with **water**?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q10. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS 'E'. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

- 1. A
- 2. B
- 3. C1
- 4. C2
- 5. DE
- 6. Not stated **THANK & CLOSE**

**CHECK QUOTAS FOR SEG**

---

Q11. Can I check whether you are working or not and if so how much? **FOLLOW UP Q10 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- 1 Working full-time
- 2 Working part-time
- 3 Full-time home maker
- 4 Not working
- 5 Taken early retirement
- 6 Retired at the state retirement age or later

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**


---

Q12. Note Gender

1. Male

2. Female

---

Q13. Which of the following age groups do you fall into?

1 18-34

4 55 – 64

2 35-40

5 65+

3 41-54

6 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**


---

Q14. Do you have any children?

1 yes

2 no

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE****EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**


---

Q15. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q16. How many people aged 17 or over live in your household?

---

Q17. How many children aged 16 or under live in your household?

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE****EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**


---

Q18. Do you or anyone else in the household have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q19. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit

- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

---

Q20 Finally, when it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

1 yes

2 no

### **Invitation: Qualboard**

Thank you for answering those questions. We would be grateful if you could spare 10 to 15 minutes each day of the next three days, to take part in an online discussion with one of our research team. None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will send you a cheque/voucher for £10 to thank you for taking part. Would you be able to take part in our research?

**PERSUADE AND REASSURE.**

5. yes **TAKE CONTACT DETAILS (SEE BELOW)**

6. no **THANK AND CLOSE**

If order for us to communicate with you about these activities, can you give us your email address and a telephone contact number?

---

Q20. Can you please tell me your email address (please ensure that your web account will accept this email and not treat it as 'spam').

---

Q21. And please can you tell me your telephone contact number

---

Q22. And finally, please can you tell me your name? (first name and surname)

---

**THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH**

### 7.1.3 Discussion guide

Hello, my name is Jo and I work for an independent market research company called Accent. We are conducting research for the Consumer Council for Water, the body that represents water consumers. Thank you very much for agreeing to help us with this research.

The research is being conducted in accordance with the Code of Conduct of the Market Research Society (MRS) and also with the Data Protection Act, with whom Accent is registered. This means that everything you say during this discussion will be confidential and will not be attributed to you personally, so please express your views frankly.

The online discussion will take place over 3 days and you will be asked to log in each day and answer a few questions about the issues in hand and, we would encourage you to engage further in the debate with your fellow panellists. It is likely that it will take 10 to 15 minutes each day to

answer the questions but you will also be required to take a bit of time to look at and think about various pieces of communication that will be shown to you.

Can I stress that we are looking for your personal views. There are no right or wrong answers. I hope you will all contribute to the discussion.

Please feel free to discuss these issues with the other people taking part in the discussion. We want to encourage a 'healthy debate'.

### *Day One – General thoughts and feelings towards having a water meter*

We're doing some research to find out about your experiences of having a water meter and wish to understand what you felt about some of the communications you have received and what impact, if any, this has had on the way you use water. We are especially interested in gathering your views about the new metered bills you have received and what difference this might have made to the way water is used in your household. Please answer as fully as you can and, if you like, comment on what other people have said.

- First of all, can I just check what information you have received from Southern Water? Do you remember receiving a forecast bill
- Do you think that everyone in the household is aware that a water meter has been installed?
- Having had the water meter for 12 to 15 months, how do you feel about having a water meter? Has it been a good or bad experience for the household? Please can you give your reasons.
- Why do you think all the households in your area are being fitted with a water meter?

Provide the following explanation

The metering programme is needed because current levels of water use mean that water resources, such as rivers, are under serious pressure and this is likely to get worse with population growth and climate change. Metering means that customers will be more aware of the water they use because their charges depend on how much water they use.

- How do you feel about it now you know the reason? Do you think it's a fairer way of charging?
- Has having a water meter made any difference to the way you use water? If so, what difference has it made? Would you say your water use has increased, decreased or stayed about the same?
- ***If no difference*** - Why do you think that is?
- ***If a difference*** - And when did this change – was it after installation, once the meter was switched on or when you received a forecast of what your first bill might be?
- Have other members of the household felt under pressure to use less water? Where did the pressure come from?

- Have you tried to encourage everyone in the household to be more aware and use less water? How have you tried to do that and how successful have you been?
- What concerns, if any, did you have about having a water meter? When did you first have those concerns? Why did you have those concerns and have they been proven? ***Moderator note high level feedback about higher bills and/or supply pipe leakage***
- Did you do anything or talk to someone about those concerns?
- Have any new issues or concerns emerged as a result of going on to a water meter?
- Prior to having the meter installed and at the time of installation, what information do you remember receiving from Southern Water?
  - What do you recall? How much of it did you read?
  - What were the key messages that came through?
  - Was there anything that particularly stood out to you? If so, what?
  - Did everything happen as you expected it to?

Thank you for your responses today. I hope you found that a valuable experience Tomorrow, we are going to look at some specific actions you may have taken with your water use. We will also have a general discussion about your new metered water bills. It might also be a good idea to talk with other people in your household to get their views too.

### *Day Two – Changing the way you use water and how your water bills have changed since going on to a water meter*

So, yesterday we discussed your general thoughts and feelings about having a water meter, some of the concerns you may have had and how this changed the way you use water, if at all. Today, we are going to look in more detail at some of the specific actions you may have taken to change your water usage as well as your initial thoughts about the new metered bills.

- What actions have you tried to take in your household to reduce your water usage? What difficulties have you experienced in doing this, if any?
- What effect did the information previously provided by Southern Water have on you? Did it make you think about your water usage? Was there any particular tip or suggestion that made an impact on you?
- Have you started using/fitted appliances which use less water, or water saving devices? (eg water efficient washing machines, aerated shower heads, tap inserts which aerate the water and reduce the rate of flow, save-a-flush or similar which go in the toilet cistern, water butts).
- What made you decide to do these things in particular?
- Did you think about using/fitting other appliances/fitting that could use less water but decide not to follow them up? If so what and why?
- Have you managed to keep up these activities which use less water? How easy or difficult have they been to carry on? Was it easy at first and become harder or the other way round?

- Can I just check whether you remember receiving the forecast bill about 6 months after the water meter was installed and your first metered water bill? Do you remember what information it provided? Was it clear/did you understand it? Did it make you act any differently? If so, how? ***Download attachment of forecast bill & first metered bill***
- What did you think of them? Did they make you act any differently? If so, how? Now that you have seen this, do you remember it? If not, would it have been helpful to have seen one? What would you have done differently, if anything
- And do you remember receiving your second metered bill. Can you remember how it compared with the first bill that came after 9 months?
- Was it more or less than the first bill?
- **If more than your first metered bill** Why do you think that might be?
- Do you think the size of your second metered bill will make you think again about how you use water? If so, how and why? What, if anything, will you/your family do differently?
- **If less than you're your first metered bill**, how do you feel about the decrease? Why do you think your bill is less this time? Have you/your family changed your water consumption habits? If so, how?
- Is your water bill easier to afford now that you have had a water meter installed? Do you think there is anything you could do make it easier to afford? What? If you think there is nothing you can do, why do you think that? ***Note to moderator - this could include using less water or agreeing payment arrangements with Southern Water***
- Do you think that Southern Water offers any help for those who cannot afford their metered bills? What do you think they offer?
- Have you asked whether any help is available to pay your new metered bills? If possible, can you share with us what you found out? How helpful did you find this?

Thank you for all your valuable insights. That is the end of today's questions. Tomorrow is the final day and we will have a bit more of a detailed discussion about your new metered bills and what impact, if any, it has had on your household

### *Day Three – More detailed investigation of bill: the clarity of it and what impact it has had on your household*

We finished off yesterday by talking about your new metered bills. Today, we are going to discuss what you think about the look and feel of the new metered bill and any whether you did anything as a result of receiving the bill.

- What did you think about the look and feel of the metered bill you received from Southern Water?
  - How much of it did you read? What was good/bad about it? Was it customer friendly?
- Was there anything that you particularly noticed? If so, what?
- Do you recall any of the following:
  - the chart showing how your water use compares with other customers ;
  - the case study showing how a family had saved water;
  - the advice on cutting down on water use.

- For any of the above things that you read/noticed, how useful and helpful was the information? Why? What was most useful? Was there anything you didn't fully understand?
- Are any of these items of information going to make you do things differently? If so, which? And what do you think you will do differently?
- Do you recall receiving a letter headed 'It's been 6 months since we turned on your water meter'?
- If so what did you think of it? How much of it did you read? How useful was it? And how helpful was it?
- Did you do or try to do anything as a result of receiving this letter – eg. seek advice, opt in to the changeover tariff, phone up with a question, go on the website, arrange a direct debit?
  - what were your reasons for making contact
  - how easy was it to make contact
  - how helpful were the various sources of information
  - were your questions answered or things put into place efficiently?
  - If letter not read or recalled, why not? Is this how you tend to deal with other correspondence (ie save them for later) or was there something about this particular letter/bill that meant you did not read it
- If you are paying by Direct Debit, did you receive adequate and timely notification about your new direct debit payments? Was the explanation clear about how your payments may be adjusted if you have ended up paying more on your metered bills?

Provide the following explanation

Moving forward, you will be receiving another bill in about 6 months time. This will compare your usage to the last 6 months and if your water consumption has increased by more than 20% since your last bill you will receive a purple bill. Moderator note – ***show example of purple bill.***

- What would you feel if you received one of these? Would you be surprised or concerned or would it be something that you could explain? Is it useful to know how much your water use has increased by?
- If surprised, what might you do if you received one of these bills? What do you think might be the reason for such an increase in water use? If you did receive a purple bill would it prompt you to think about how much water you use? Why? How you might you respond?
- Finally, has the metering programme made you more aware of Southern Water and the services they provide? Has it changed your views of the company at all? In what way/ why not
- Overall, what do you feel about the information and support you have received throughout the change from an unmetered to a metered supply – from your first notification that you would be having a meter to the first metered bill you got

We will close there, thank you for all your very valuable contributions.

## 7.2 In-home depth interviews

### 7.2.1 Achieved sample

	ABC1	C2DE
<b>Pre-family</b>	1	1
<b>Family</b>	1	1
<b>Post-family</b>		1
<b>Retired</b>	2	1
<b>Vulnerable</b>	1	1

### 7.2.2 Recruitment screener

#### Screening

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. Can you spare 3-4 minutes to run through a few questions to check that you are eligible to take part in this research?

---

Q1. This research is looking at the experience of Southern Water customers who had a water meter installed about 12 to 15 months ago and who have recently received their second metered bill with charges worked out on how much water they have used. Can I first check how long ago your meter was installed?

- 1 any time Feb 2012 or later, ie up to 11 months ago **THANK & CLOSE**
- 2 any time Jan 2012, Oct to Dec 2011, ie up to 12 to 15 months ago

**SEE INSTRUCTIONS FOR POSSIBLE CASE WHERE IT WAS NOT POSSIBLE TO INSTALL A METER OR WHERE A MORE MODERN METER WAS EXCHANGED FOR AN OLDER MODEL**

---

Q2. And have you received your second metered bill with charges worked out on how much water you have used?

- 1 yes
- 2 no/don't know **THANK & CLOSE**

---

Q3. And please can you tell me whether this bill is for more, less or about the same amount as bills you had before your water meter was installed?

- 1 more
  - 2 less
  - 3 stayed the same
  - 4 Don't know **THANK & CLOSE**
- EQUAL SPREAD OF EACH CATEGORY**



---

Q4. Can I check, are you the person in your household who is responsible – either solely or jointly - for paying your household’s **water** bill(s)?

- 4 Yes **JOINTLY – GO TO Q5**
- 5 Yes **SOLELY – GO TO Q5**
- 6 no **ASK FOR CORRECT RESPONDENT & RESTART**

---

Q5. Do you or any of your close family work or have worked in the recent past in any of the following professions: marketing, advertising, public relations, journalism, media, market research or the water industry or the Environment Agency?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q6. Have you taken part in any market research in the last **2 years**; this might have taken the form of a face to face or telephone interview or a group discussion?

- 1 yes
- 2 no **GO TO Q7**

---

Q7. Have you taken part in market research about anything to do with **water**?

- 1 yes **THANK & CLOSE**
- 2 no

---

Q8. What is the job title of the chief wage earner of your household or, if you are the chief wage earner, your own job title? **IF RETIRED, PROBE WHETHER STATE OR PRIVATE PENSION. IF STATE ONLY CODE AS ‘E’. IF PRIVATE ASK WHAT THEIR OCCUPATION WAS PRIOR TO RETIREMENT? PROBE**

What are/were his/her/your qualifications/responsibilities? **PROBE**

**WRITE IN AND CODE SEG** .....

- 1. A
- 2. B
- 3. C1
- 4. C2
- 5. DE
- 6. Not stated **THANK & CLOSE**

**CHECK QUOTAS FOR SEG**

---

Q9. Can I check whether you are working or not and if so how much? **FOLLOW UP Q8 TO FIND OUT WHICH OF THE FOLLOWING APPLIES**

- 1 Working full-time
- 2 Working part-time
- 3 Full-time home maker
- 4 Not working
- 5 Taken early retirement
- 6 Retired at the state retirement age or later
- 7 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q10. Note Gender

- 1. Male
- 2. Female

---

Q11. Which of the following age groups do you fall into?

**CODE AGE BAND BELOW**

- 1 18-34
- 2 35-40
- 3 41-54
- 4 55 – 64
- 5 65+
- 6 Refused

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

Q12. Do you have any children living at home ?

1 yes

2 no **Pre family**

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT YOU WOULD NOW LIKE TO ASK THEM ABOUT THE SIZE AND MAKE-UP OF THEIR HOUSEHOLD**

Q13. Can you tell me how many people are living **permanently** in your household?

**Do not count children who are away at university during term-time or those who stay from time to time but live with another parent the rest of the time**

---

Q14. How many people aged 17 or over live in your household?

---

Q15. How many children aged 16 or under live in your household?

**Pre-family: no children 16 or under living with them – check because could be partner’s children and then they would qualify as a family)**

**Family: at least 1 child aged 16 and under living in the family home**

**Post-family: no children aged 16 or under living with them**

**USE INFORMATION TO HELP ARRIVE AT LIFESTAGE**

---

**EXPLAIN THAT WE WOULD LIKE TO INCLUDE IN THE RESEARCH PEOPLE WHO MAY EXPERIENCE PARTICULAR DIFFICULTIES WITH PAYING THEIR WATER BILL AND YOU NEED TO ASK THEM A FEW MORE QUESTIONS TO HELP WITH THIS**

Q16. Do you or anyone in your household have any physical or mental impairment, or an illness or condition that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities?

Long-term means that the effect of the impairment has lasted or is likely to last for at least 12 months. Normal day-to-day activities include everyday things like eating, washing, walking and going shopping.

1 yes

2 no

---

Q17. Do you receive any of the following benefits? **Tick all that apply**

- a. Attendance Allowance
- b. Carer's Allowance
- c. Child Tax Credit
- d. Council Tax Benefit
- e. Disability Living Allowance
- f. Housing Benefit
- g. Income Support
- h. Jobseeker's Allowance
- i. Working tax credit
- j. None of these

**PLEASE AIM TO ACHIEVE 6 WHO ARE VULNERABLE BASED ON PHYSICAL IMPAIRMENT OR BENEFITS**

---

Q18. When it comes to paying your household bills, do you ever struggle and sometimes get behind with your payments?

---

1 yes

2 no

**PLEASE AIM TO ACHIEVE 2 TO 3 WHO STRUGGLE**

---

Q19. Do you have access to the Internet? This could be at home, at work, at the library or at a friend or relative's house?

1 yes

2 no

---

Q20. How often do you use the Internet to find information you need? Do you use it regularly, occasionally, rarely or never?

- 1 regularly
- 2 occasionally
- 3 rarely
- 4 never

**PLEASE INCLUDE SOME CUSTOMERS WHO DO NOT HAVE ACCESS TO THE INTERNET OR HAVE ACCESS BUT NEVER USE IT OR USE IT RARELY**

### **Invitation: In home depth**

Thank you for answering those questions. We would be grateful if you could spare a further 30 to 40 minutes, to take part in an interview over the telephone with one of our research team at a date and time that is convenient for you. None of your comments will be attributed to you personally and will only be used as part of everyone's comments. We will also provide you with £20 to thank you for taking part. Would you be able to take part in our research?

**PERSUADE AND REASSURE.**

- 7. yes **TAKE CONTACT DETAILS AND MAKE APPOINTMENT**
- 8. no **THANK AND CLOSE**

**NB. IF THE CUSTOMER HAS SOME FORM OF DISABILITY, PLEASE USE YOUR DISCRETION IN ASKING WHETHER THIS MIGHT AFFECT HOW WE CONDUCT THE INTERVIEW**

---

**THANK RESPONDENT FOR THEIR HELP IN THIS RESEARCH**

## 7.2.3 Discussion guide

### **Introductions**

See 3.3.3

### **General Thoughts and Feelings Towards Having a Meter**

- Can I just ask if other members of the household are aware that a water meter has been installed? And what do you understand this to mean for the household? If unaware, what do you think are the reasons for you not being aware?
- Having had the meter for about 12 months, how do you feel about having a water meter? Has it been a positive or negative experience for the household?
- Why has it been a good/bad/indifferent thing?

- Why do you think all the households in your area are being fitted with a water meter? If not mentioned so far, we will explain that it is because current levels of water use mean that water resources, such as rivers, are under serious pressure and this is likely to get worse with population growth and climate change. Metering means that customers will be more aware of the water they use because they are being charged on the basis of what they use. How do you feel about it now you know the reason? Do you think it's a fairer way of charging? If so, in what way (as necessary, check whether it's fairer because you pay for what you use and/or because everyone has to have a meter)
- Has having a water meter made any difference to your lives/routine. If so, what difference has it made? If no difference. Why do you think that is? Is it because you are already careful or perhaps you do not see the need to? So would you say your water use has stayed about the same?
- **If a difference (*Moderator try and establish from other members of household before the bill payer*)** - And when did this change – was it after installation, once the meter was switched on, when you received a forecast of what your first bill might be or when you received your first actual bill?
- Now ask bill payer to confirm when he/she thinks things started to happen differently
- Is there any sense from other members of the household that they were under pressure to use less water? Where did the pressure come from – other people in household, self? If so, how did you respond to that pressure and what impact did it have on your behaviour? Do you think you will keep it up?
- What effect did the information (eg leaflets/letters) provided by Southern Water have on you. Did it make you think about your water usage?
- If the bill-payer has tried to encourage everyone to be more aware and use less water, what has he/she tried to do and how successful has he/she been? What do other MoH think of his/her efforts? Was he/she right to try and make those changes? Why/why not?
- What concerns, if any, did you have about having a water meter? When did you first have those concerns? And have those concerns been proven? ***Moderator note high level feedback about higher bills and/or supply pipe leakage eg***
  - what were you expecting
  - why were you expecting this
  - and did you do anything or talk to someone about those concerns
- Have any new issues or concerns emerged as a result of going on to a water meter?
- Prior to having the meter installed and at the time of installation, what information do you remember receiving?
  - What do you recall? How much of it did you read?
  - What were the key messages that came through?
  - Was there anything that particularly impacted you? If so, what?
  - Did everything happen as you expected it to?

### **Water Usage Customer Behaviour**

- Having had the meter for about 12 months, how has your water usage changed, if at all?
- Did you/members of the household expect to change the way you use water before receiving your first bill? If so, how?

- Are you personally/as a family using less, more or the same prior to having a water meter? If using less, what are you doing differently?
- How did the information from Southern Water influence your behaviour?
- As relevant, what actions have you tried to take in your household to reduce your water usage? Have you experienced any difficulties in doing this (such as resistance from members of the household? Or simply forgetting/finding it difficult to form a new habit/routine)
- Have other members of the household tried to use less water in any way? What kind of things have you been doing to achieve this?
- Have you started using/fitted appliances which use less water, or water saving devices? (Such as water efficient washing machines, shower head, tap inserts which aerate the water and reduce the rate of flow, save-a-flushes or similar which go in the toilet cistern, water butts...).
- And why are you doing these things in particular?
- Have you managed to keep up these activities? How easy or difficult have they been to carry on? Was it easy at first and become harder or the other way round?

### **Meter Issues/Problems**

- Have you had any problems with the meter itself? If so, what are they?
- Any problems with leaks? If so, what action did you take/Southern Water take?
- Have you tried reading the meter yourself? If so, how easy or difficult did you find it to do. If not, is this something you would want to do? Why? How would you use the information?

### **Customer Perceptions of Bill/Affordability**

- Can I just check whether you remember receiving both the forecast bill about 6 months after the water meter was installed and your first real metered bill? Do you remember what information was provided? Were they clear/did you understand them?
- What did you think of them? Did it make you act any differently? If so, how?

**Note to moderator – if customer cannot recall please show them examples of each.**

- Now that you have seen them, do you remember them? If not, would it have been helpful to have seen one. What would you have done differently, if anything
- And do you remember receiving your second metered bill. Can you remember how it compared with the first bill that came after 9 months?
  - Was it more or less than the first bill, or was it what you were expecting?

**Moderator note any mention of purple bills. These will have been sent where customers' water consumption has increased by more than 20% since their first metered bill**

- If more than your first metered bill, why do you think that might be?
- Do you think the size of this second metered bill will make you rethink and change your water use? If so, how and why? What, if anything, will you/your family do differently?
- If less than your first metered bill how do you feel about the decrease? Why do you think your bill is less this time? Have you/your family changed your water consumption habits? If so, how?

- How important is it for you/your family to reduce your water consumption (further)? Why?
- Which actions do you expect to have the greatest effect on your water bill?
- Is your water bill more affordable now that you have had a water meter installed?
  - If not, what things could you do to make it more affordable **Note to moderator - this could include using less water or agreeing payment arrangements with Southern Water**
- What did you think about the look and feel of the metered bill you received from Southern Water?
  - How much of it did you read?
  - What was good/bad about it?
  - Was there anything that you particularly noticed? If so, what?
- Do you recall any of the following:
  - the comparison chart on their bill;
  - the case studies;
  - the advice on cutting down on water use.
- For any of the above things that were read/noticed, how useful and helpful was the information? Why? What was most useful?
- Are any of these items of information going to make you do things differently? If so, which? And what do you think you will do differently?
- And did you read the information about where help with bills can be found? If so, what were the key messages that were being communicated?
- Do you recall receiving a letter headed 'It's been 6 months since we turned on your water meter'?
- If so what did you think of it? How much of it did you read? How useful was it? And how helpful was it?
- Did you do or try to do anything as a result of receiving this letter – eg. seek advice, opt in to the changeover tariff, phone up with a question, go on the website, arrange a direct debit? Ask the following
  - reasons for making contact
  - ease of making contact
  - how helpful were the sources
  - were your questions answered or things put into place efficiently?

If not, why not? Explore whether this is typical of how they deal with their other bills or whether there was something about the bill that meant they did not read it eg. how customer friendly it looked?
- Overall, did you find the bill easy to read and generally customer friendly? And the letter?
- **Ask all** Do you think that Southern Water offers any additional help for those who cannot afford their metered bills? (Note to moderator: this includes the Change Over tariff, payment plans, a Home Saver Check to see if they could save water and energy, a benefits entitlement check, a social tariff i.e. a reduced tariff paid for by charging other customers a small amount more)

- Explore whether anyone has taken up one of these offers and why? Is it because their bill is higher and therefore a more significant part of their household budget or were they already struggling with their water bills.

If they didn't take these options up can you please ask why – was it because they are still able to afford the bill/didn't think they could still access it /wanted to see what next bill looked like?

**Moderator - note if they have opted into Changeover tariff** as they should have received a 'Changeover statement'. If so, ask

- What did you think of it? How much of it did you read? How useful was it? And how helpful was it? Was it clear & easy to understand?

**Moderator - note mention of those on Direct Debit**

- Did you receive enough notification about your new direct debit payments?
- And was the explanation clear about how your payments may be adjusted if you have ended up paying more on your metered bills? *Ask respondent to explain?*
- Do you think you might take any of these other options up in the future
- Moving forward, you will be receiving another bill in about 6 months time. This will compare your usage to the last 6 months and if your water consumption has increased by more than 20% since your last bill you will receive a purple bill. **Moderator note – show example of purple bill**
- What would you feel if you received one of these? Would it be a surprise or would it be something that you could explain? Is it useful to know how much your water use has increased by?
- If surprised, what would you do if you received one of these bills? Would you call Southern Water or perhaps go onto their website?
- What do you think might be the reason for the increase in water use? EG someone else has moved into the household, or had tried to save water for the first bill but it was less than expected and have now relaxed
- If you did receive a purple bill would you think about how much water you use and how you might make savings?

**Attitude to Southern Water & Learnings**

- Has the metering programme made you more aware of Southern Water and the services they provide? Has it changed your views of the company at all? In what way/ why not (follow up to find out what they thought/think of SW)?
- Has it made you think differently about what is involved in ensuring that this region has a reliable supply of water (If not think differently, has it made them more aware?)
- Other parts of England will also be undergoing compulsory metering programmes over the next few years and the Consumer Council for Water wants to learn from the experiences of customers like you. Is there anything that Southern Water could have done differently? Is there any other information that it could provide? Is there any other practical help that they could give?
- Overall, what do you feel about the information and support that has been provided throughout the transition from an unmetered to a metered supply – this would include the process from when you first received notification that you would be having a meter to the first metered bill you got

- Finally, is there anything about having the water meter/metered bills which you would like to ask/know more about – perhaps if there is something that remains unanswered or you are not clear on?