



# Research into domestic customers and SMEs preparedness for winter (September 2012)

Commissioned by:



Report written by:

Ian Neale

[ian.neale@yougov.com](mailto:ian.neale@yougov.com)

0207 012 6008

**YouGov**<sup>®</sup>  
What the world thinks



# Contents

Executive summary	Slides 4-6
Background & method	Slides 7-8
Information sources: Use and trustworthiness	Slides 9-10
Concerns and precautions for winter	Slides 12-19
Experience of having a burst pipe	Slides 20-21
Reacting to frozen and burst pipes	Slides 23-26
Providing information on precautions to take in winter	Slides 27-32
Seeking information on winter precautions	Slides 33-35
Overall opinion of water companies	Slides 36-37
Face-to-face findings	Slides 38-41
Appendices	Slides 42-47





# Executive Summary

# Headline findings

## 1. Water consumers awareness of measures to protect pipes from freezing

- **The majority of domestic and SME water customers have water tanks that are insulated, but more opportunity exists to target the 41% of domestic customers who don't have or don't know if they have lagging on their pipes.**
  - The majority of domestic customers (73%), SMEs (74%) and offline customers (90%) reported that their water tanks were insulated. A similar proportion of SMEs (75%) and offline customers (85%) also reported that the pipes at their premises/ homes were lagged but a lower proportion (59%) of domestic customers stated this.
  - For domestic customers, people who live in terraced houses (52%) or flats or maisonettes (27%) and those people who rent property (33%) are significantly less likely to report that their pipes are lagged. The proportion of these groups who said they didn't know whether their pipes were lagged was high, indicating a lack of awareness of this issue or in some cases a passing of responsibility to the owner of the property.
- **Confidence was high of knowing what to do to avoid frozen pipes but knowledge of what to do if pipes freeze was more variable.**
  - The majority of SMEs (84%) and domestic customers (67%) are confident that they know what to do to avoid frozen pipes in winter, although a lower proportion of offline customers (59%) reported that they were confident. For domestic customers, the least confident are the youngest age groups (25-34), people who live in flats and people who rent property. It is also the case that people who live in the Thames Water region are least confident and knowledgeable about winter precautions, but the Thames Water region has a disproportionate amount of people who live in flats and in rented accommodation.
  - One in five (22%) domestic water customers do not know what to do if a pipe freezes at their home. SMEs and offline customers were slightly more aware, with 16% and 13% respectively reporting that they didn't know what to do. Again, this was more likely to be people aged 25-34, people who live in a flat/ maisonette, and people in the Thames Water region. For both SMEs and domestic customers, knowledge was much lower of what to do to thaw the pipe. Just 1 in 5 SMEs and domestic customers knew that you should thaw the pipe with a towel soaked in hot water or thaw with a hair dryer.
- **There is concern from both domestic customers and SMEs that water companies don't do enough to protect their own pipes and drains.**
  - Half of domestic customers (50%) and 48% of SMEs don't think that water companies do enough to protect their own pipes and drains from freezing in winter.
  - Just 7% of domestic and 14% of SME customers thought that water companies do enough to protect their own pipes and drains from freezing in winter.



# Headline findings (2)

## 2. What triggers water consumers to seek information?

- **There is a very mixed picture on how pro-active domestic and SME customers are when seeking information on how to protect water pipes at their home/ premises, but overall water customers are not pro-active in seeking information.**
  - SMEs are slightly more likely to also proactively seek information (20% reporting this compared with 16% of domestic customers).
  - For both domestic customers and SMEs the warning of severe weather is likely to induce people to seek information, with 31% of domestic customers and 24% of SMEs reporting this to be the case. For domestic customers, the older age groups are more likely to proactively seek information, 23% of over 55s would proactively seek information compared with just 7% of those aged 25-34.
- **Burst water pipes both inside and outside the property are perceived as a low risk by both domestic and SME customers and both give little thought to lagging pipes at winter. There is also little concern about pipes freezing and potentially bursting at homes and premises.**
  - One in ten domestic customers, offline customers and SMEs felt that a burst water pipe inside their property was the highest risk of happening to their property and 6% of SMEs and 7% of domestic customers that a burst pipe outside of the property was the highest risk.
  - The majority of domestic water customers (who haven't already lagged pipes or insulated their boiler) also give little thought to lagging pipes (20% a lot/ some thought) and insulating water tanks (13% a lot/ some thought) at winter. SMEs (who haven't already lagged pipes or insulated their boiler) also give the least thought to lagging pipes (31% a lot/ some thought) and insulating water tanks (33% a lot/ some thought) at winter. Although, SMEs do give more thought to these issues than domestic water customers.
  - There seems little concern around pipes freezing and potentially bursting at homes and premises. Just one in ten domestic customers (10%) and SMEs (8%) felt worried that this would happen during winter. But the younger age groups are more worried and a slightly higher proportion of offline customers (14%) were worried.
  - But worry is higher for those businesses who consider water to be critical or those who have not taken any precautions. Those SMEs who consider water to be critical are significantly more worried (14%) than those for whom water is not critical (2%). And those domestic customers who have not taken the precaution of lagging their pipes are more worried about water pipes freezing and bursting than those with lagging (15% of those without lagging are worried compared with 9% of those with lagging).
- **For over half domestic customers (53%) and offline customers (57%), a consideration of the risk of having a pipe burst at their home would make them take more precautions in the future to protect pipes during winter.** SMEs appear to place less importance on the risk of having a burst pipe, with 41% agreeing that this risk would make them take more precautions in the future to protect pipes during winter and 37% disagreeing.

# Headline findings (3)

## 3. How should water consumers be targeted with information?

- **Networks (friends and family/ business networks) or search engines are the most used sources for general information on home/ premises maintenance**
  - The top three sources that domestic customers would turn to first for information on home maintenance are friends and family (51%), search engines (48%) and DIY stores (34%). Offline customers are more likely to use local newspapers (32%) as a replacement for the internet. The influence of friends and family is critical, as this is both the source domestic customers turn to first and the source considered the most trustworthy (77%).
  - The top three sources that SMEs would turn to first for information on premises maintenance are search engines (42%), friends and family (27%) and business networks (23%). SME water customers were more likely than domestic consumers to not use any of these sources to find information on premises maintenance.
- **When thinking about information on precautions for winter, domestic customers and SMEs are clear that water companies should provide information. But a significant number have not heard anything from their water company and only a minority agree that their water company is doing enough to inform them of what precautions to take to avoid frozen pipes in winter.**
  - Domestic water customers (72%), SMEs (69%) and offline customers (68%) are clear that it is their water company's responsibility to provide them with information on precautions to take in winter.
  - The majority of domestic consumers (55%), offline customers (56%) and SMEs (57%) had not heard anything from any source about precautions to take at winter. Given that there is the expectation on water companies to provide information, the majority of both SMEs (65%) and domestic customers (61%) and 47% of offline customers could not recall receiving any information from their water company on precautions to take in winter.
  - Furthermore, just 13% of domestic customers and 16% of SMEs agree that their water company is doing enough to inform them of what precautions to take to avoid frozen pipes in winter. Although a higher proportion of offline customers (28%) felt their water company was doing enough.
- **To influence customers, using water companies, providing robust information on websites and recognising the importance of friends and family and business networks are key. Demographic differences should also be reflected in targeting the younger age groups and renters.**
  - Water companies are the source of information that most domestic customers (48%) and SMEs (61%) would take notice of if they wanted more information on precautions to take in winter. Friends and family (43%) and a more general internet search (37%) are also sources that would have an impact on domestic consumers. Internet searches (26%), the Local Authority (24%) and local business groups (24%) are also sources that would have an impact on SMEs.
  - At this point social media is not a source of information to use to target customers, as just 5% report they would take notice of information provided through social media.





# Background and method



# Background and method

- This summary report presents the findings from a online survey of domestic and Small and Medium Enterprise (SME) water consumers and a face-to-face survey with customers who have limited or no computer access on their knowledge, awareness and overall preparedness for winter.
- A survey questionnaire was developed by YouGov and the Consumer Council for Water to test the public's and SME's use and trust of information sources on home/ premises maintenance, concerns and preparation for winter, experience of burst pipes and their knowledge and confidence in reacting to frozen and burst pipes. The questionnaire also considered sources of information on precautions to take at winter and opinion on how well water companies are doing in providing information and protecting their pipes.
- Throughout the report differences in the data are identified by water company region. When references are made to water company region these refer to water and Sewerage Company (WaSC) region and may include customers of water only companies.

## **Domestic customer online survey**

- A total of 1,135 adults (18+) were surveyed online between 31/08/12 and 05/09/12 across England and Wales with the results weighted to be representative by age, gender, region and social class. Respondents were drawn at random from the YouGov panel of over 350,000 adults living in England and Wales. A number of key demographic and behavioural differences were analysed including: whether the respondent was a water bill payer, whether they had a disability or impairment, their household tenure and which water only or water and sewerage company area they live in. A breakdown of the sample composition is provided in the appendices.

## **SME customer online survey**

- A total of 418 senior decision makers within organisations of between 1 and 249 employees were surveyed online between the 31/08/12 and 11/09/12 across England and Wales. The survey was focussed on senior decision makers who had a knowledge of their organisation's premises management. Respondents were drawn at random from the YouGov panel of SMEs in England and Wales. A number of key business differences were analysed including: the organisation size, sector and primary use of premises.

## **Face-to-face survey of customers who have limited or no computer access (offline)**

- A face-to-face survey of 157 people was undertaken between 31/08/12 and 11/09/12 across England and Wales covering a mix of urban and rural locations. The individuals were randomly selected and the sample structured to ensure that respondents were non internet users and met at least one of the following criteria; low income, disabled or elderly.

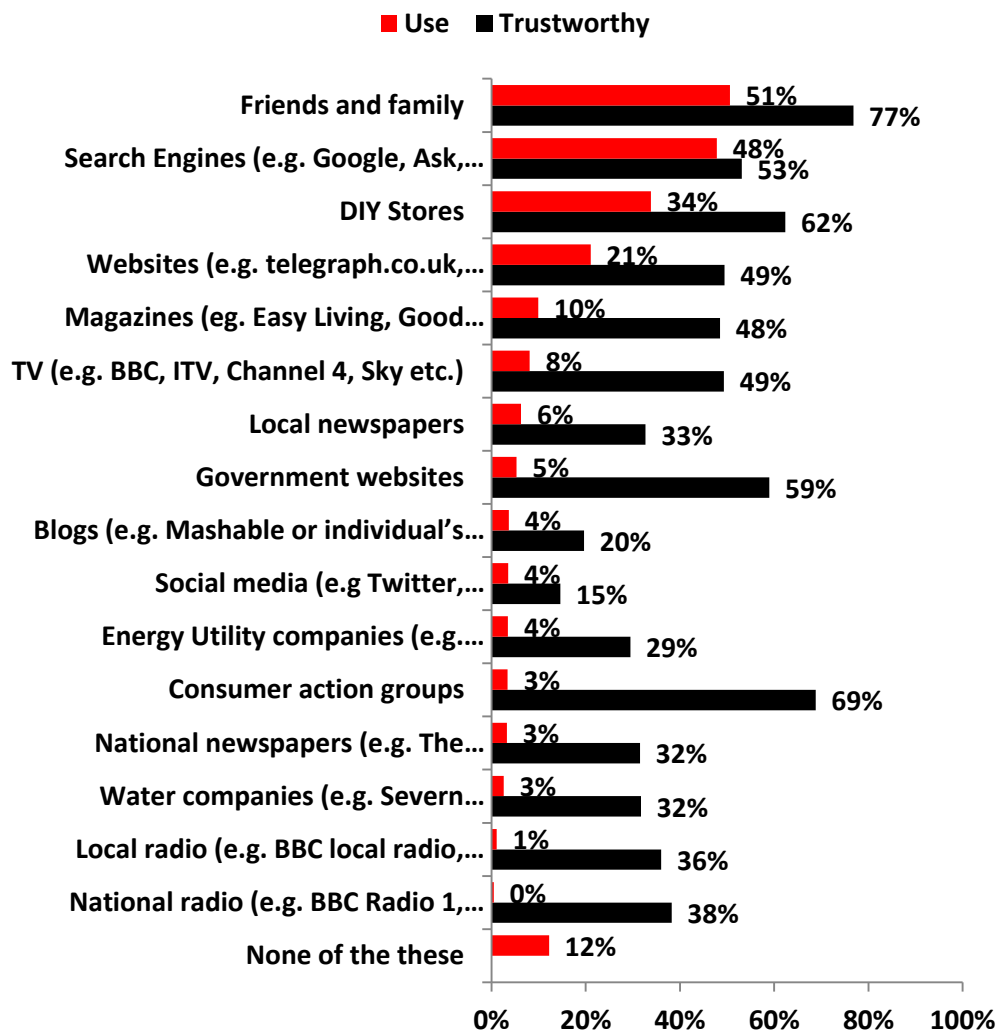




# Information sources: Use and trustworthiness

# Where domestic water customers look for information on home maintenance – use versus trust

Sources customers would use first for information on home maintenance and how trustworthy they feel these sources are



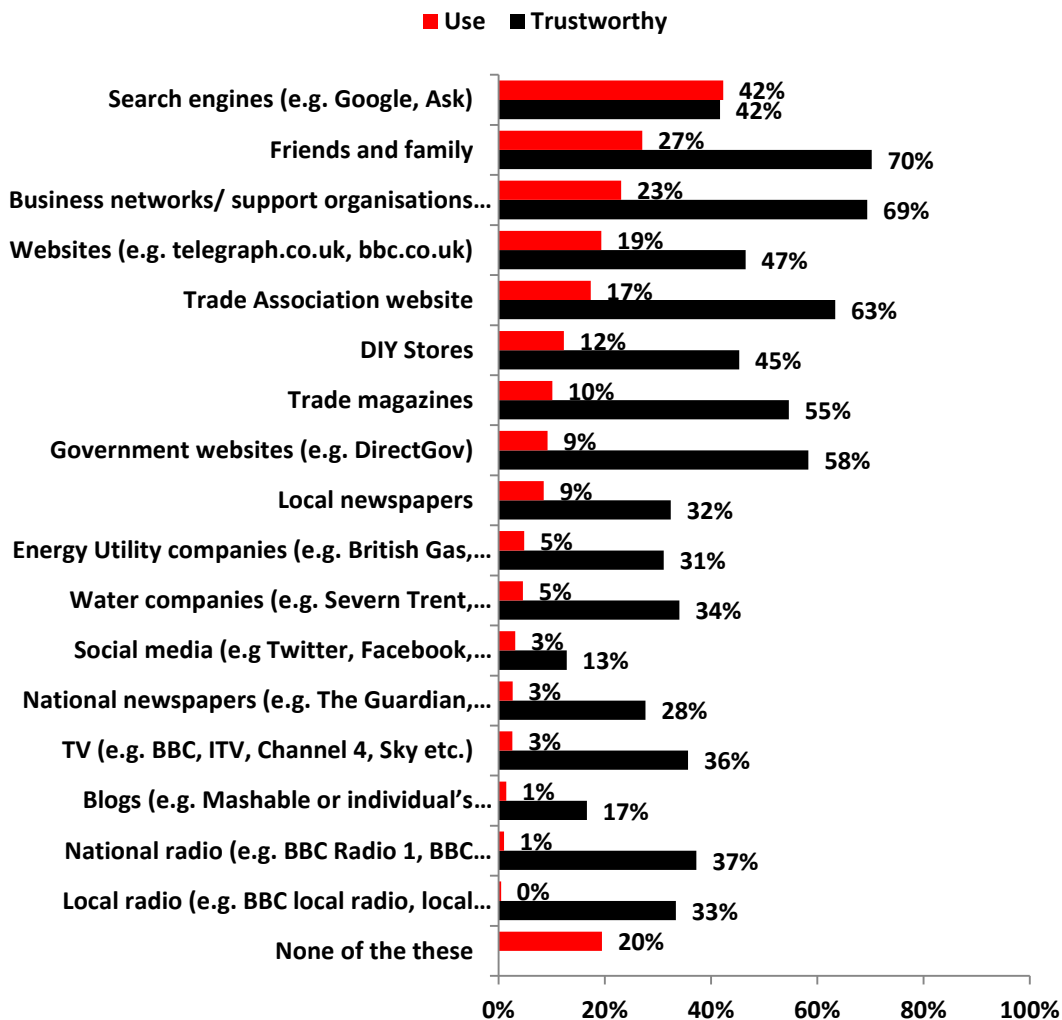
Base: Sources used - all England and Wales Adults (n=1,135), trustworthiness – all who had used at least one of these sources (n=996)

- The top three sources that people would turn to first for information on home maintenance are friends and family (51%), search engines (48%) and DIY stores (34%). Women (56%) are more likely than men (44%) to turn to friends and family first for information.
- People are very unlikely to look first to national radio, local radio and water companies for information on home maintenance.
- The oldest people (55+) are significantly more likely to seek information on home maintenance from local newspapers (10%) and significantly less likely to use search engines (40% of the over 55s reporting this). People with some form of disability are also significantly more likely to turn first to local newspapers (11%) than those people without a disability (5%).
- The influence of friends and family is critical, as this is both the source people turn to first and the source considered the most trustworthy (77%). Consumers also consider DIY stores (62%) to be trustworthy, as are consumer action groups (69%) and government websites (59%) – although the latter two sources are used less.
- The assessment of a source being trustworthy or untrustworthy is in many examples based upon perception rather than direct experience. For example, 32% of consumers rates social media untrustworthy, but only 13% said this was based upon direct experience.



# Where SMEs look for information on premises maintenance – use versus trust

Sources SMEs would use first for information on premises maintenance and how trustworthy they feel these sources are



Base: Sources used - all SMEs (n=418), trustworthiness – all who had used at least one of these sources (n=336)

- The top three sources that SMEs would turn to first for information on premises maintenance are search engines (42%), friends and family (27%) and business networks (23%). SME water customers were more likely than domestic consumers to use none of these sources to find information on premises maintenance.
- As with domestic customers, SMEs are very unlikely to look first to national radio and local radio for information on premises maintenance.
- The influence of friends and family and business networks is important, as SMEs considered these sources the most trustworthy (70% and 69% respectively). SMEs also consider a range of other sources such as trade association websites (63%), government websites (59%) and trade magazines (55%) to be trustworthy – although the usage of these sources is low.
- The assessment from SMEs of a source being trustworthy or untrustworthy is based upon either perception or direct experience. In many cases perception dominates, for example; SMEs consider social media to be the most untrustworthy (44%) but for only 20% of SME's is this based upon direct experience.

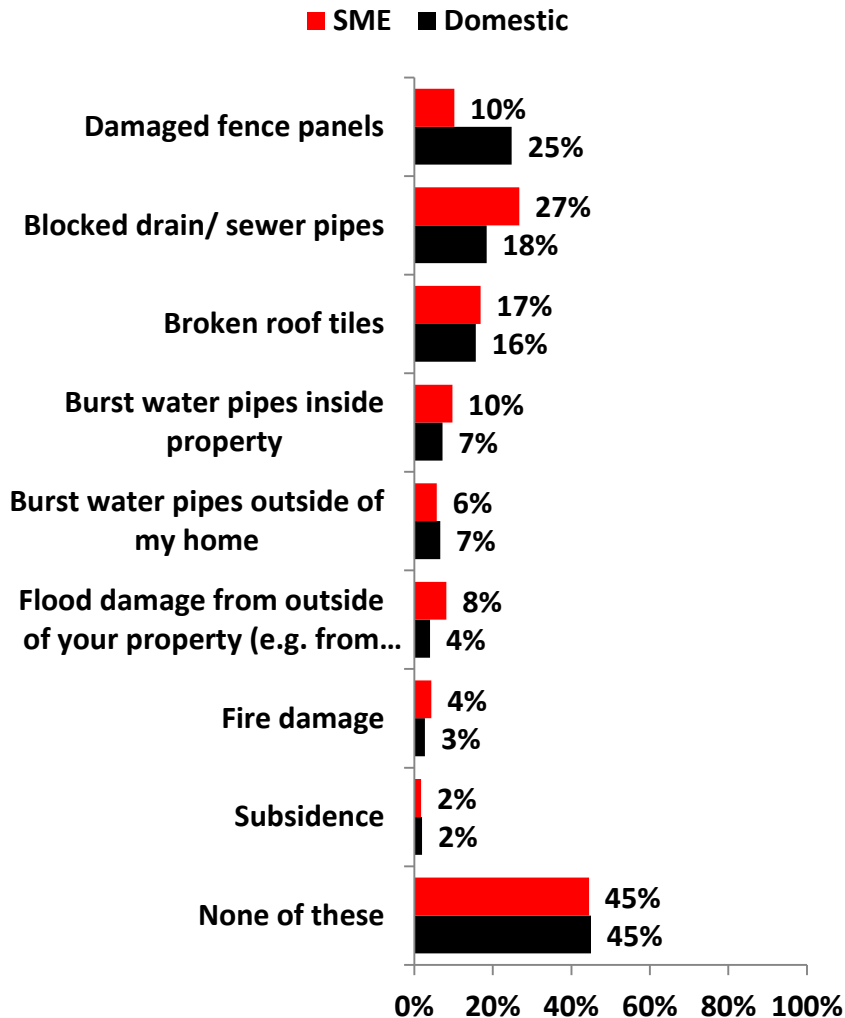


# Concerns and preparation for winter



# Concerns about damage to domestic and commercial property

**Domestic and SME water customers views on what has the highest risk of happening to their property over the next 12 months**



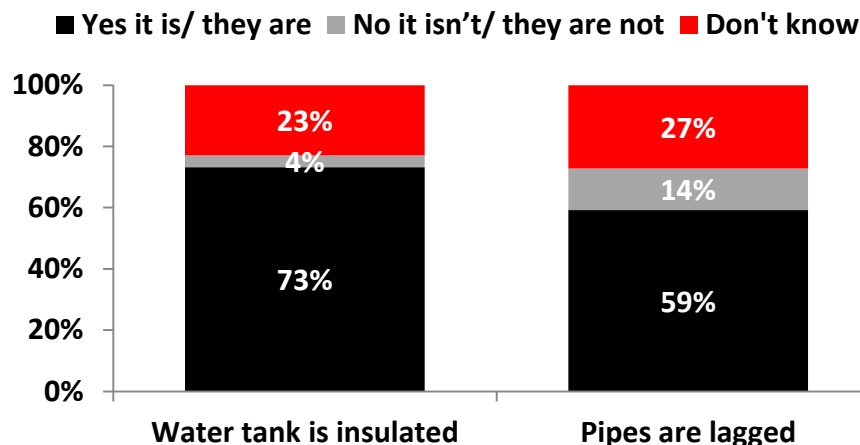
Base: Domestic customers (n=1,135), SME (n=418).

- A significant proportion of both domestic customers (45%) and SMEs (45%) do not perceive their property is at risk of being damaged over the next 12 months.
- Domestic consumers feel that fence panels being damaged has the highest risk of happening (25%), whereas for SMEs blocked drain/ sewer pipes are the biggest risk (27%).
- Burst water pipes both inside and outside the property are perceived as a lower risk by both domestic and SME customers. One in ten domestic consumers and SME's felt that a burst water pipe inside their property was the highest risk and 6% of SMEs and 7% of domestic customers that a burst pipe outside of the property was the highest risk.
- For domestic consumers, the perceived risk of having a burst pipe inside or outside of their home is significantly higher for those people who have experienced a frozen pipe, burst pipe or flooding damage previously:
  - Risk of having a burst pipe inside my home:
    - Had a frozen pipe – 21%
    - Had a burst pipe – 24%
    - Had flooding damage – 24%
    - Not had any of these – 4%
- For SMEs the perceived risk of having a burst pipe inside their premises is higher for those organisations who consider a daily water supply to be critical to their business:
  - 14% - Risk of having a burst pipe for SMEs who said water was critical
  - 3% - Risk of having a burst pipe for SMEs who said water was not critical

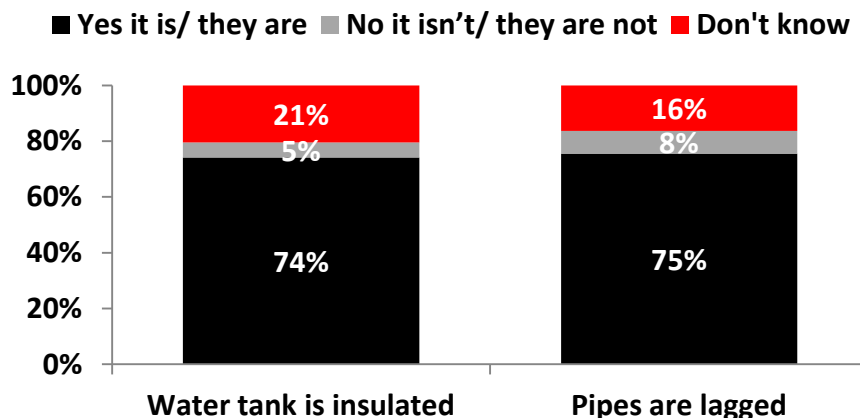
SMEs who's premises are used for industry/ production (18%) also perceived the risk of having a burst pipe inside their premises to be higher than those whose premises were an office (7%).

# Whether domestic customers and SMEs know if they are protected for winter

## Domestic water customers knowledge of whether their water tank and pipes are protected for winter



## SMEs knowledge of whether their water tank and pipes are protected for winter



Base: All domestic water customers excluding not applicable to their home (water tank n=808, pipes n=1,060)

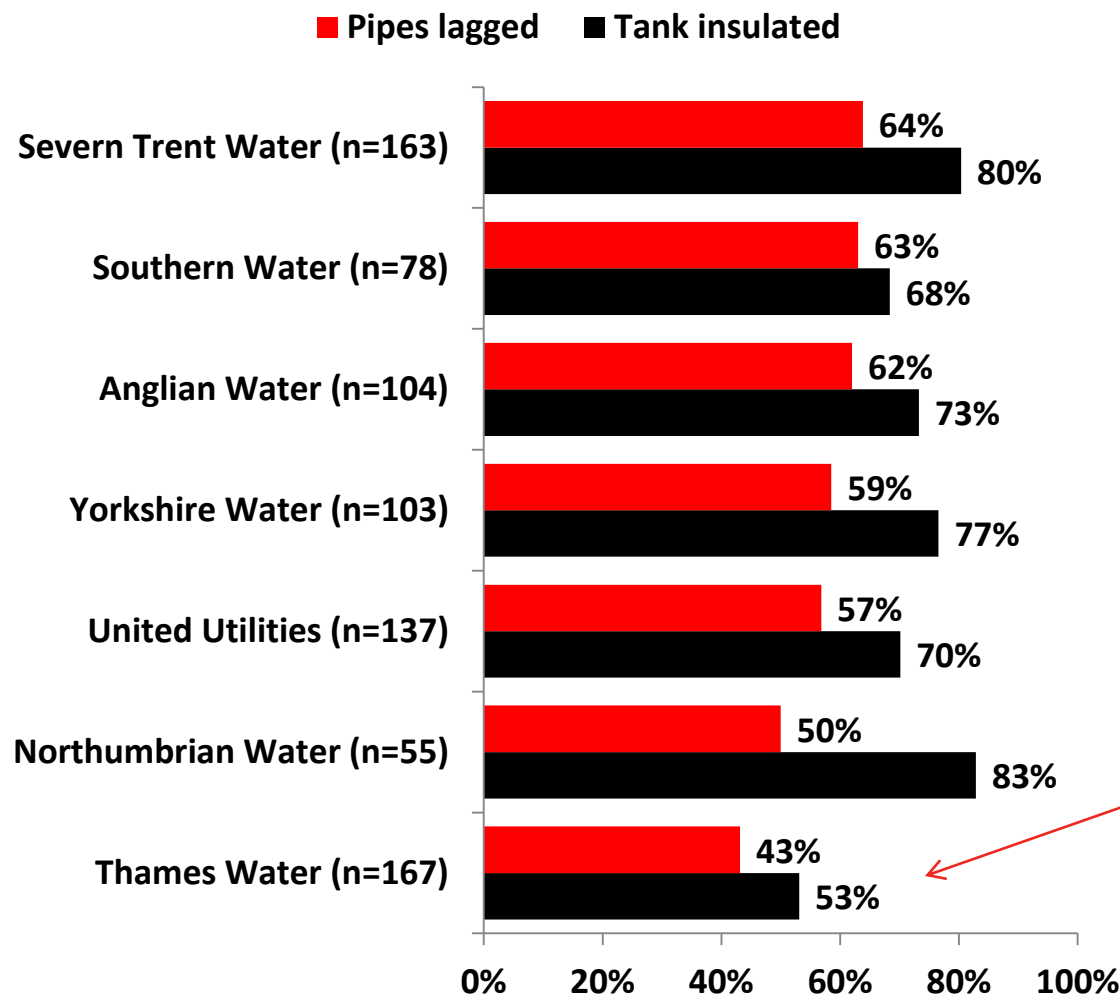
All SMEs excluding not applicable to their premises (water tank n=312, pipes n=369)

- The majority of both domestic customers (73%) and SMEs (74%) reported that their water tanks were insulated. A similar proportion of SMEs (75%) also reported that their pipes at their premises were lagged but a lower proportion (59%) of domestic customer stated this.
- A significantly lower proportion of domestic customers aged 25-34 (47%) were aware that their water tank was insulated and that their pipes were lagged (31%).
- For domestic consumers, by property type and ownership, knowledge of whether their water tanks are insulated or pipes are lagged differs:
  - Having a water tank that is insulated is significantly more likely for those people who live in a detached house (92%) than people who live in semi-detached (76%), a terrace (69%) or flat or maisonette (48%) and for those people who own their property outright (94%) compared to people with a mortgage (75%) and renters (52%).
  - Pipes being lagged is significantly more likely for those people who live in a detached property (82%) compared with people who live in semidetached (62%), a terrace (52%) or flat or maisonette (27%) and for those people who own their property outright (83%) compared to people with a mortgage (59%) and renters (33%). Although the proportion of these groups who said they didn't know whether their pipes were lagged was very high – demonstrating a lack of knowledge.



# How the lagging of pipes and the insulation of water tanks varies by domestic water customer area

Domestic water customers knowledge of whether their water tank and pipes are protected for winter



Domestic customers in the **Thames Water** region are least likely to have lagging on their pipes and insulation on their water tanks.

Domestic customers in the **Northumbrian Water** region are also less likely to have lagging on their pipes.

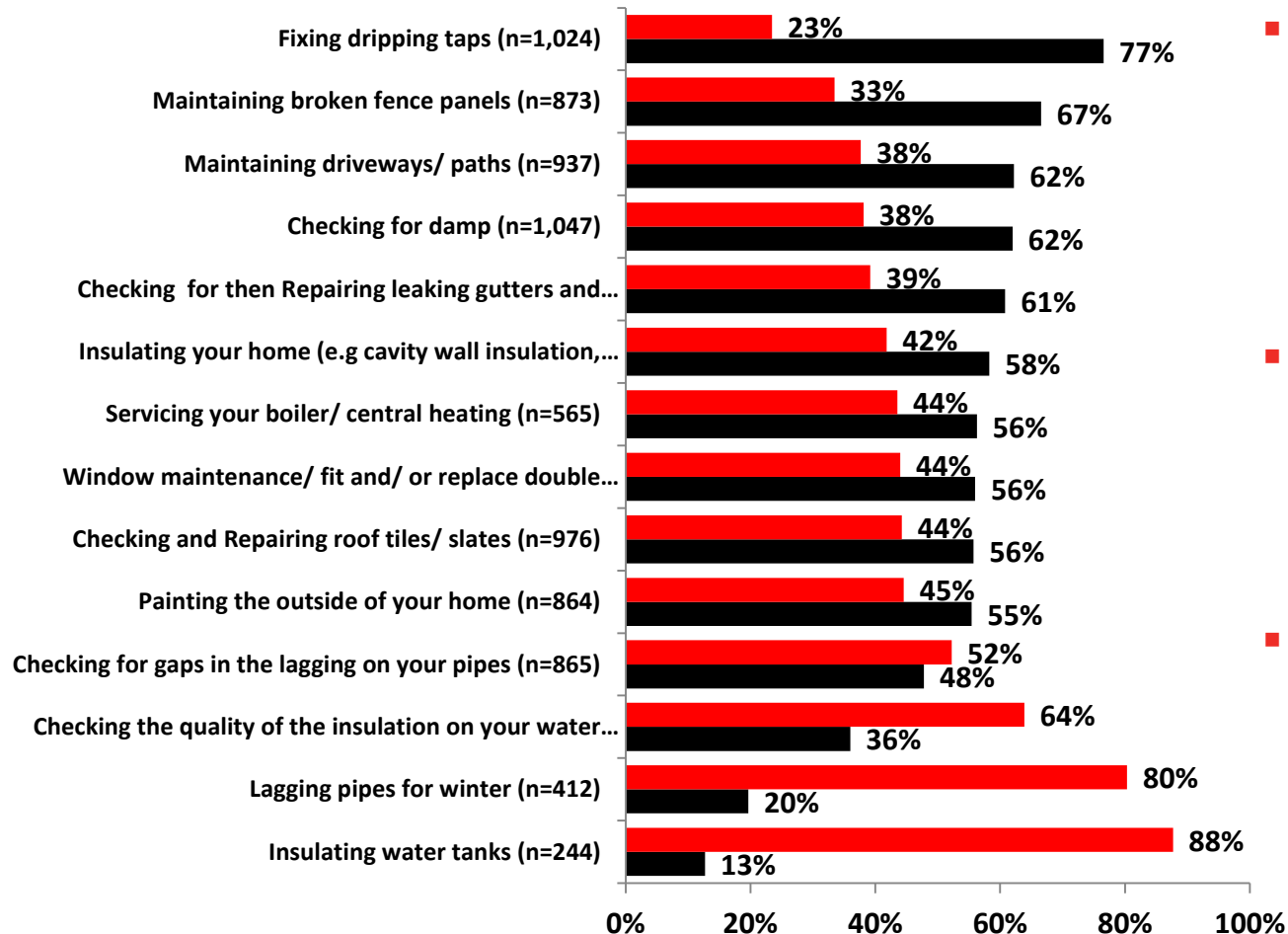
But the demographics and property type are a factor. Residents of the Thames Water and Northumbrian Water region are more likely than average to be:

- Living in a flat/ maisonette
- In rented accommodation
- To be under 35 years of age

# How much thought do domestic customers give to home maintenance ahead of winter?

Thinking about your home, how much thought do you give to each the following, if at all?

■ Not a lot of thought/ never think about this ■ A lot/ some thought



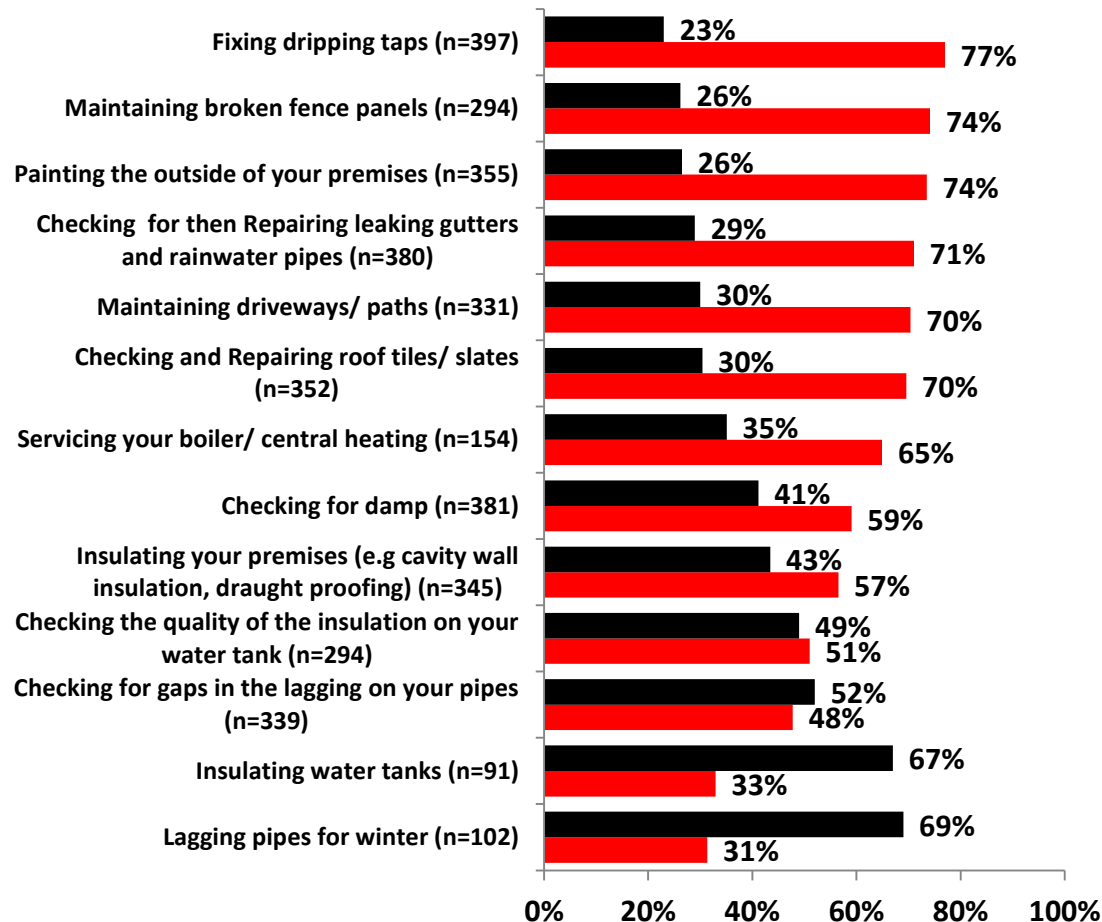
- Domestic water customers (who haven't already lagged pipes or insulated their boiler) give little thought to lagging pipes (20% a lot/ some thought) and insulating water tanks (13% a lot/ some thought) at winter.
- More thought is given to checking lagging (48% a lot/ some thought) and checking insulation (36%) by those customers who already have this in place.
- The most thought is given to fixing dripping taps (77%) and maintaining broken fence panels (67%).



# How much thought do SMEs give to maintenance of premises ahead of winter?

Thinking about your premises, how much thought do you give to each the following, if at all?

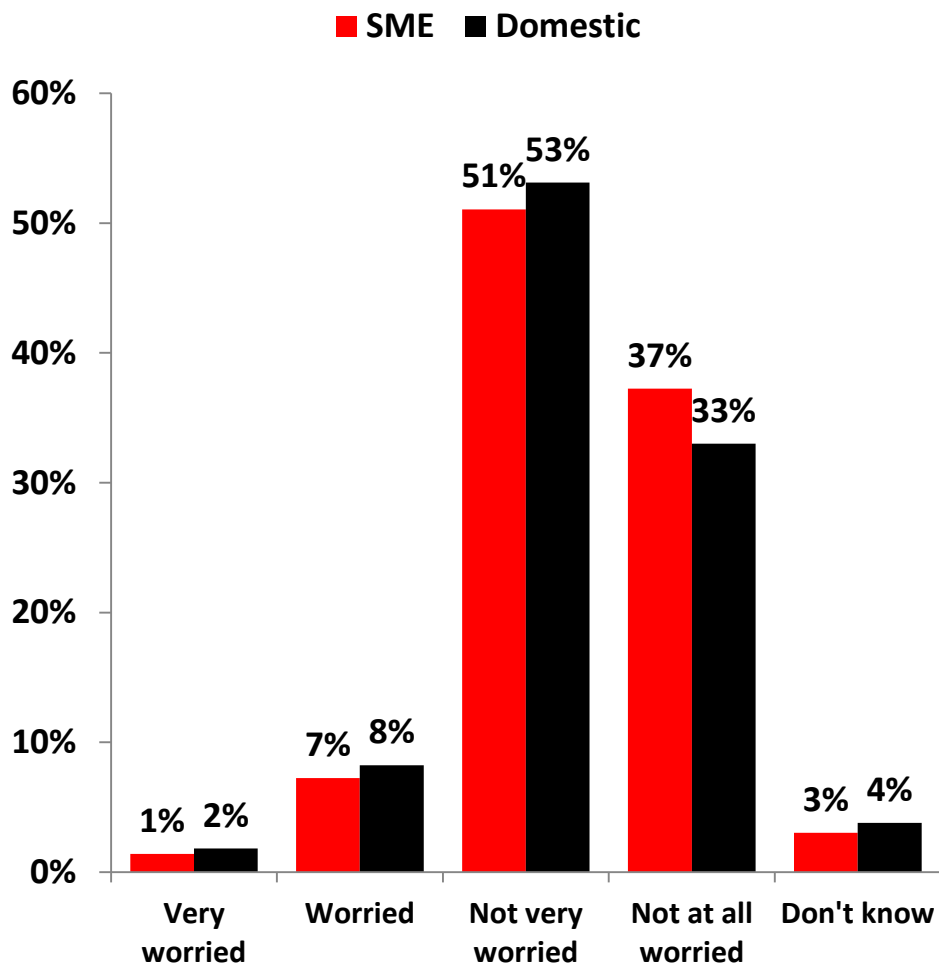
■ Not a lot of thought/ never think about this ■ A lot/ some thought



- SMEs (who haven't already lagged pipes or insulated their boiler) also give the least thought to lagging pipes (31% a lot/ some thought) and insulating water tanks (33% a lot/ some thought) at winter. Although, SMEs do give more thought to these issues than domestic water customers.
- More thought is given to checking lagging (48% a lot/ some thought) and checking insulation (51%) by those SMEs who already have this in place.
- The most thought is given to fixing dripping taps (77%), painting the outside of the premises (74%) and maintaining broken fence panels (74%).

# How worried are domestic customers and SMEs about having a burst pipe?

How worried are you that water pipes at your home/ premises may freeze and potentially burst during the winter?



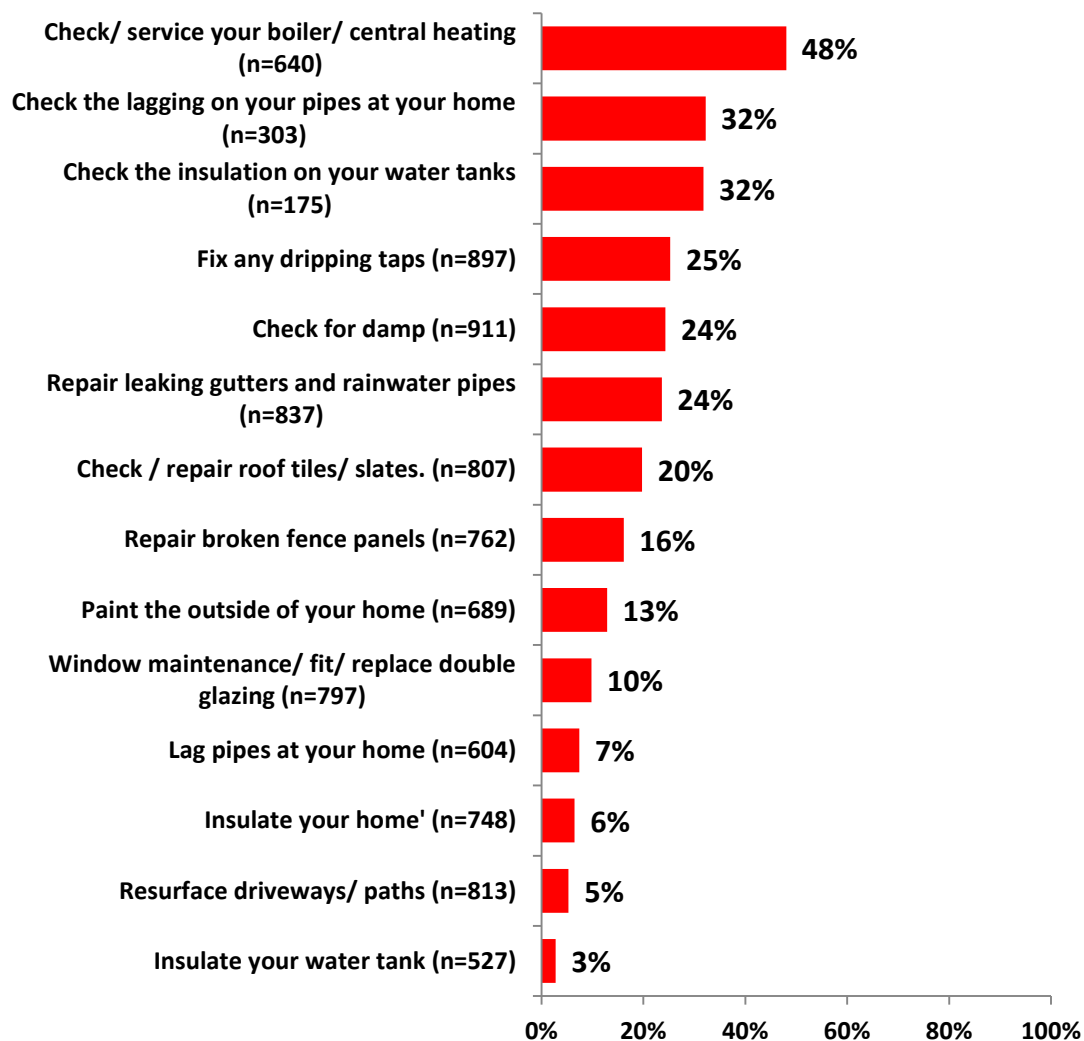
Base: Domestic customers (n=1,135), SME (n=418).

- There seems little concern around pipes freezing and potentially bursting at homes and premises. Just one in ten domestic customers (10%) and SMEs (8%) felt worried that this would happen during winter.
- Those domestic customers who have not taken the precaution of lagging their pipes are however more worried about water pipes freezing and bursting than those with lagging (15% of those without lagging are worried compared with 9% of those with lagging).
- For domestic customers:
  - the younger age groups (25-34 – 16%) were significantly more likely than people aged 45-54 (7%) and 55+ (8%) to be worried.
  - People with a disability (13%) were significantly more worried than those without a disability (8%).
  - People in the Yorkshire water region (20%) were more worried than the average .
- For SMEs:
  - Organisations who consider water to be critical are significantly more worried (14%) than those for whom water is not critical (2%).
  - Organisations whose premises are used for industrial/ production purposes (20%) are significantly more worried than those whose premises are used for office space (7%).



# What types of home maintenance do domestic customers intend to do?

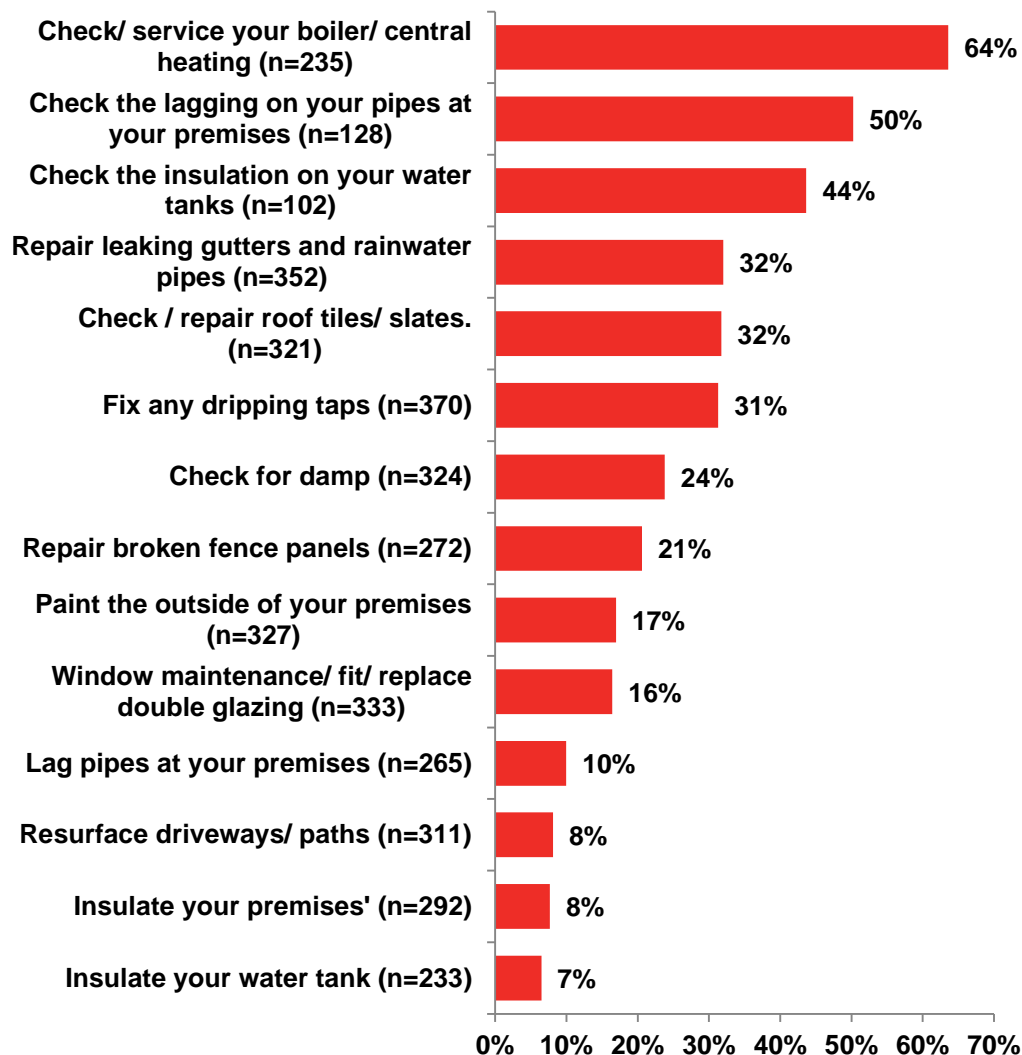
## What home maintenance do you intend to do in time for winter?



- Nearly a third of domestic customers who have lagging on their pipes or insulation for their water tank, intend to check the lagging (32%) or their insulation on the water tank (32%).
- Checking or servicing a boiler was the type of home maintenance that most people were intending to do before winter, with nearly half (48%) mentioning this.
- Of those people who don't already have lagging on their pipes or their water tank insulated, the intention to do so was low. Just 3% of those people intended to insulate their water tank and 7% intended to lag their pipes before winter.
- However those people who had suffered a frozen pipe before and had not lagged their pipes were more likely to intend to lag their pipes (22% reporting this) than people who had not suffered a frozen pipe.

# What types of premises maintenance do SMEs intend to do?

What premises maintenance do you intend to do in time for winter?



- Half of SMEs (50%) who have lagging on their pipes or insulation for their water tank, intend to check the lagging and 44% intend to check the insulation on their water tank.
- Checking or servicing a boiler was the type of premises maintenance that SMEs were intending to do before winter, with nearly two thirds (64%) mentioning this.
- Of those SMEs who don't already have lagging on their pipes or their water tank insulated, the intention to do so was low. Just 7% of those SMEs intended to insulate their water tank and 10% intended to lag their pipes before winter.





# Experience of having a burst pipe

# Experience of having a burst pipe

## Domestic customers

6% of domestic customers have suffered a burst pipe (base = 1,135)

Have insurance to cover damage?

Yes, 57%

No, 27%

DK, 17%

How much disruption?

Severe disruption, 16%

Moderate disruption, 31%

Minor disruption, 38%

No disruption, 14%

Base: All domestic customers who suffered a burst pipe (n=73)

## SMEs

13% of SMEs have suffered a burst pipe (base = 418)

Have insurance to cover damage?

Yes, 75%

No, 18%

DK, 8%

How much disruption?

Severe disruption, 8%

Moderate disruption, 31%

Minor disruption, 52%

No disruption, 10%

Had to close premises?

Yes, 16%

No, 82%

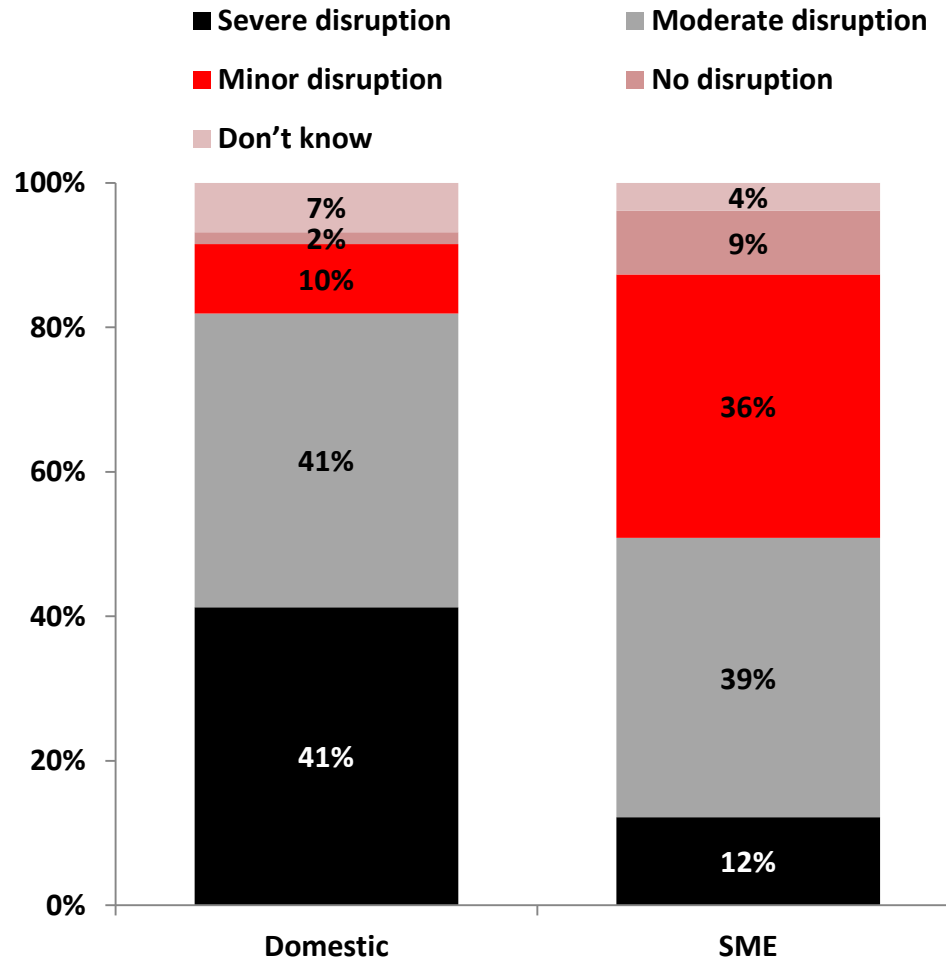
Don't know, 2%

Base: All SMEs who suffered a burst pipe (n=53)



# What domestic and SME customers perceive would be the disruption of having a burst pipe

If a water pipe at your home/ premises was to burst, how much disruption, if any, do you think this would cause?



Base: Domestic customers excluding those who have had a burst pipe (n=1,062)  
SMEs excluding those who have had a burst pipe (n=365)

- Four out of ten domestic customers think that having a burst pipe at home would cause severe disruption, this is in contrast to the 2 out of 10 who said that actually having a burst pipe caused severe disruption.
- Females are more likely than males to think a burst pipe would cause severe disruption (45% compared with 37%).
- SMEs are less likely to think that having a burst pipe would cause severe disruption to their business, with 12% reporting this, similar to the 8% (of SMEs who had previously had a burst pipe) reporting that it actually caused severe disruption.
- As may be expected, those SMEs who consider water to be critical to their business are significantly more likely to think a burst pipe would have severe disruption (35%) than those SMEs who consider water less critical (2% of those SMEs who consider water not critical).

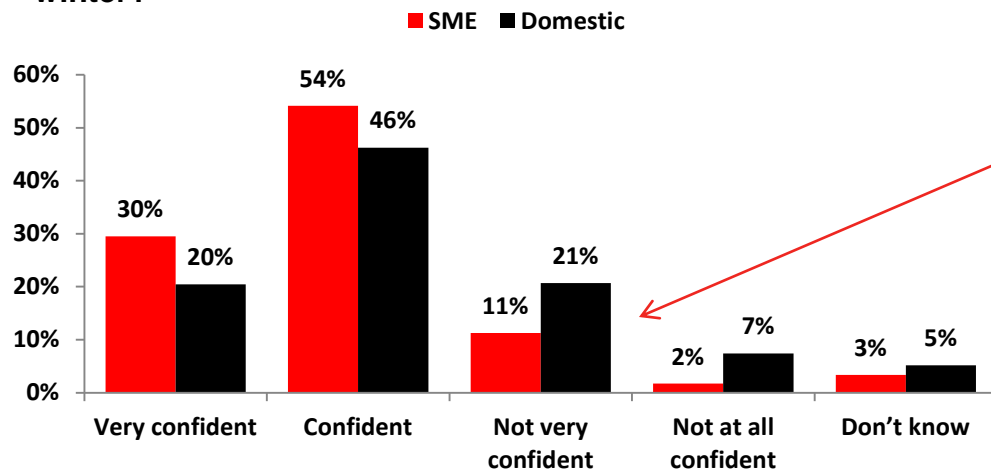


# Reacting to frozen and burst pipes



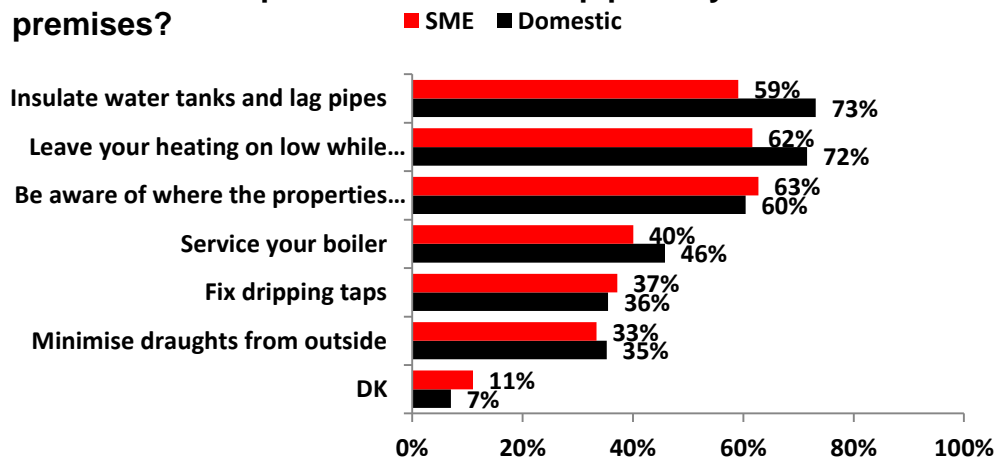
# Confidence and knowledge of avoiding frozen pipes...

How confident would you say you are of knowing what to do to avoid frozen water pipes at your home/ premises in winter?



- The majority of SMEs (84%) and domestic customers (67%) are confident that they know what to do to avoid frozen pipes in winter.
- Domestic customers - who are least confident?
  - The young (45% of 25-34 year olds said they were confident at all compared with 84% of 55+)
  - Women (64% confident compared with 70% of men)
  - People without a disability (66% confident compared with 73% of those with a disability)
  - People in a flat/ maisonette (54% confident)
  - People in rented accommodation (51% confident)
  - People who live in the Thames Water region (60% confident)

Which of the following do you think you/your organisation should do to help avoid frozen water pipes at your home/ premises?



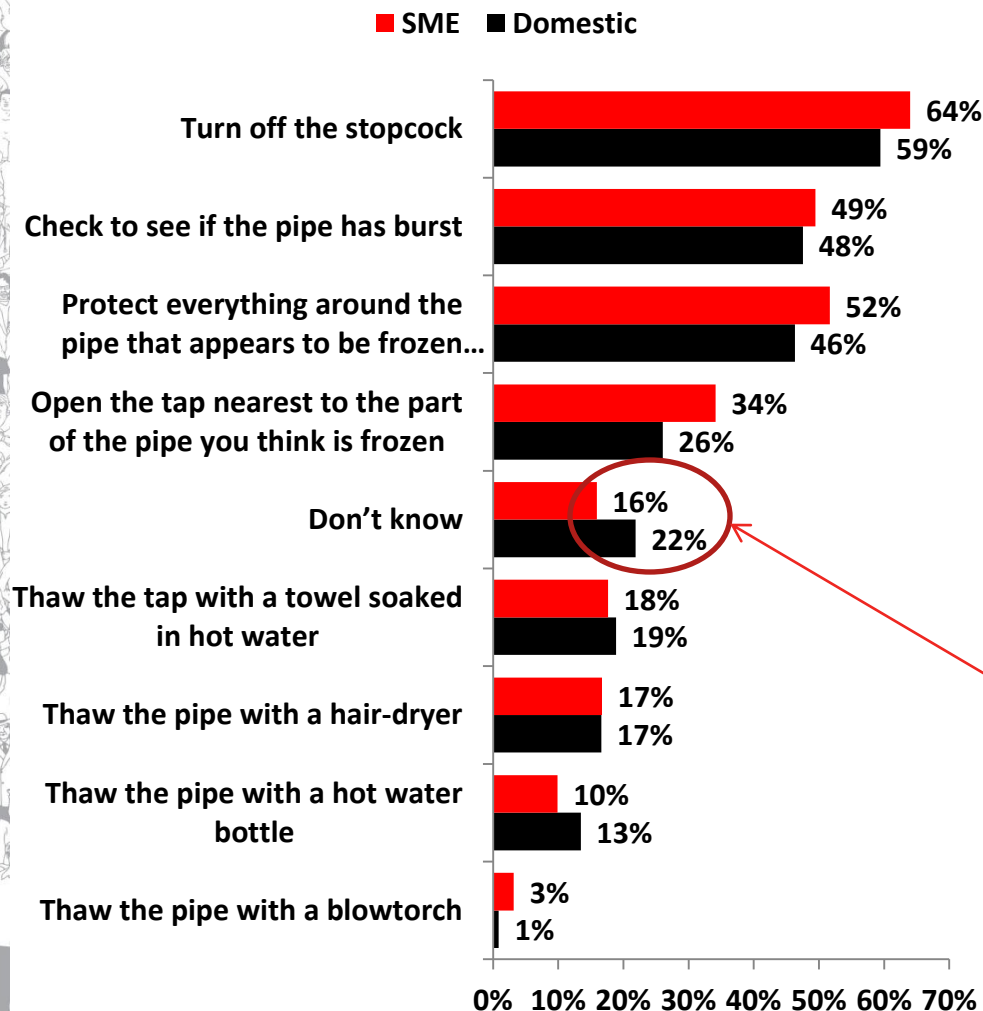
- For both domestic and SME customers knowledge was high that to avoid frozen pipes you should insulate water tanks and lag pipes, leave the heating on low while the property is unoccupied and be aware where the properties internal stopcock is in case a pipe bursts.
- There was lower knowledge from domestic customers and SMEs that fixing dripping taps and minimising draughts from outside are precautions that you should take to help avoid frozen pipes.

Base: Domestic customers (n=1,135), SME (n=418).



# Knowledge of what to do if a pipe freezes...

Which of the following would you do if a water pipe freezes at your home/premises?



Base: Domestic customers (n=1,135), SME (n=418).

- The majority of SMEs (64%) and domestic customers (59%) were aware that you should turn off the stopcock if a pipe freezes.
- Around half of SMEs (49%) and domestic customers (48%) were also aware that you should check to see if the pipe has burst.
- For both SMEs and domestic customers, knowledge was much lower of what to do to thaw the pipe. Just 1 in 5 SMEs and domestic customers knew that they should thaw the pipe with a towel soaked in hot water or thaw with a hair dryer.
- Only 3% of SMEs and 1% of domestic customers felt that they should use a blowtorch to thaw the pipe.

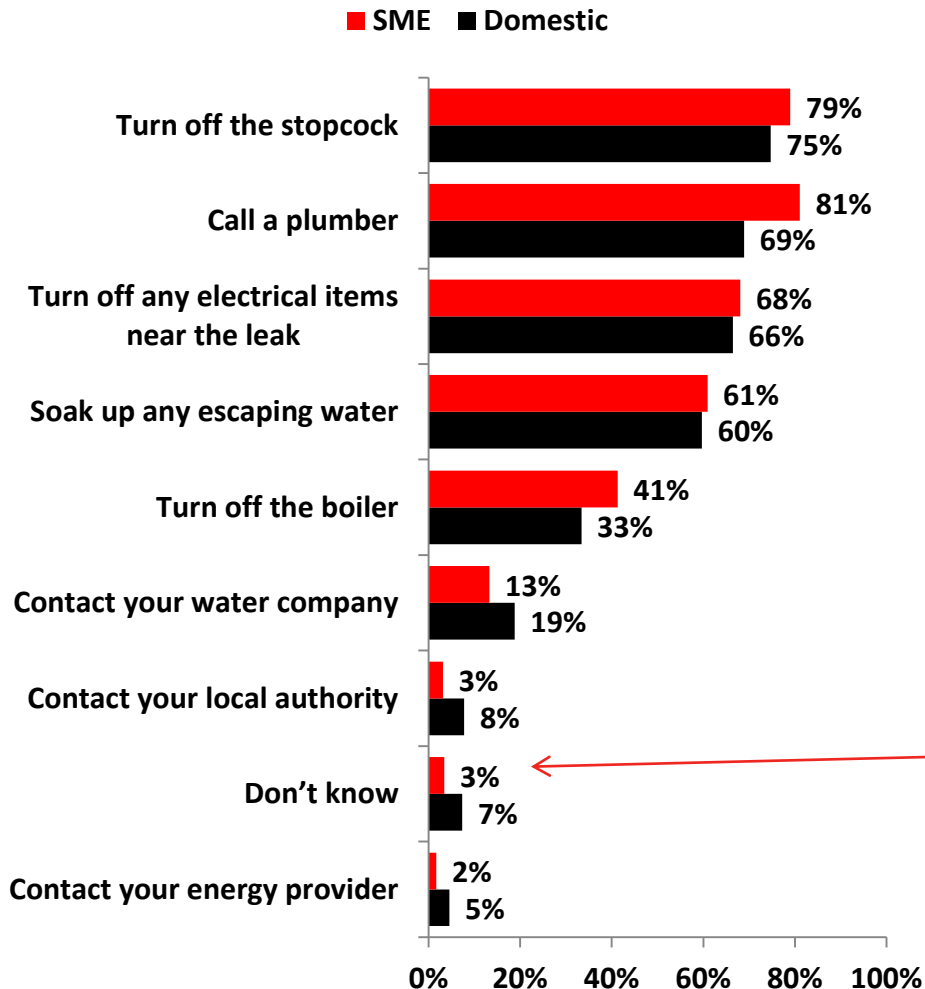
One in five (22%) domestic water customers do not know what to do if a pipe freezes at their home. SMEs are only slightly more aware, with 16% reporting that they didn't know what to do.

Who is the least knowledgeable?

- People aged 25-34 - 38% didn't know what to do
- People who live in a flat/ maisonette - 34%
- People in the Thames Water region - 37%

# Knowledge of what to do if a pipe bursts...

Which of the following would you do if a water pipe bursts at your home/ premises?



Base: Domestic customers (n=1,135), SME (n=418).

- There was sound knowledge from SMEs and domestic customers around what to do if a pipe was to burst at their property.
- The vast majority of SMEs (79%) and domestic customers (75%) were aware that you should turn off the stopcock if a pipe bursts.
- SMEs were more likely than domestic customers to feel that the correct response was to call a plumber (81% of SMEs reporting this compared with 69% of domestic customers).
- Much smaller proportions of SMEs and domestic customers felt that they should contact their water company, their local authority or their energy company.

While a very small proportion of domestic and SME water customers didn't know what to do if a pipe bursts, knowledge was significantly lower for:

- People aged 25-34 - 15% didn't know what to do
- People from a BME group – 19%
- People who live in a flat/ maisonette - 14%
- People in rented accommodation – 15%



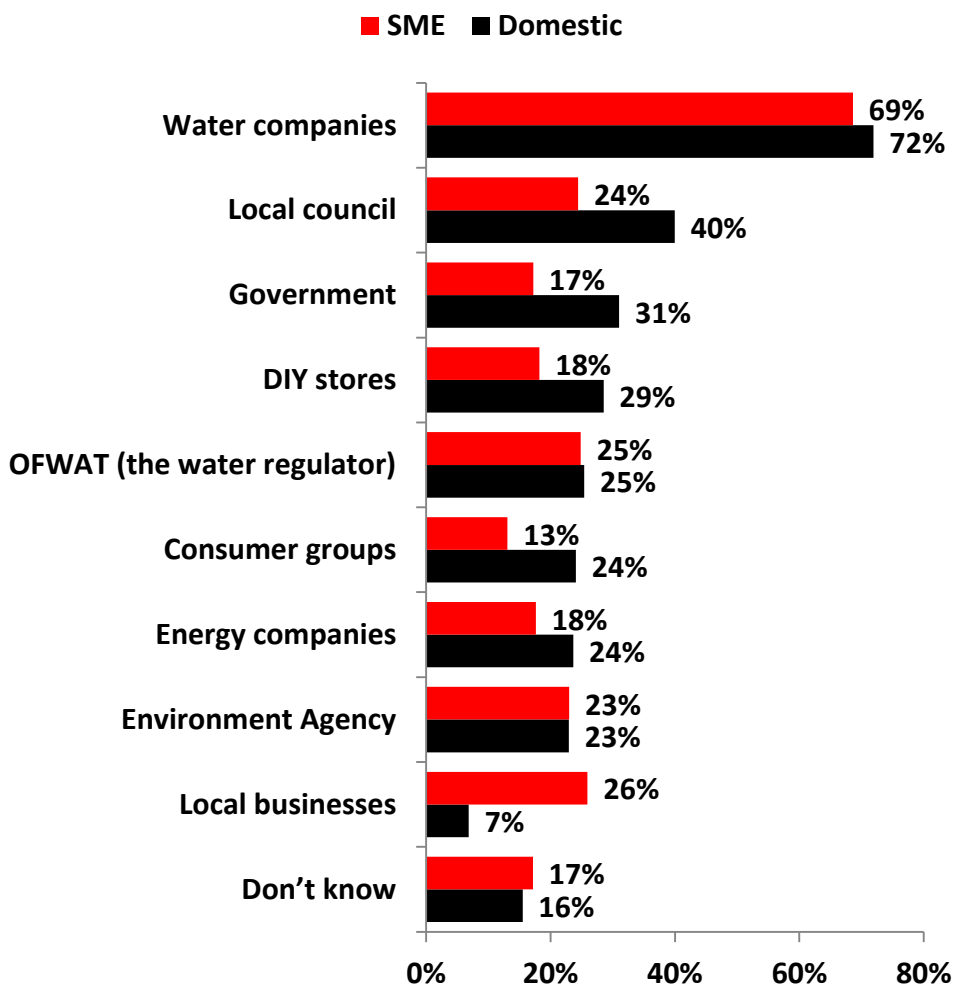


# Providing information of precautions to take at winter



# Who should provide information on winter precautions?

Thinking about the responsibility for providing information to help you protect the pipework at your home/ premises in the winter, which of the following would you expect to provide information?



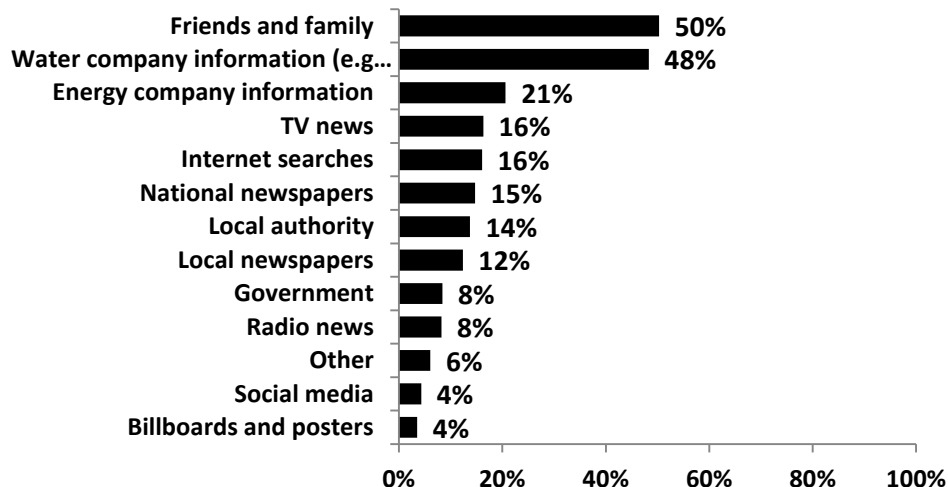
Base: Domestic customers (n=1,135), SME (n=418).

- Both SMEs and domestic water customers are clear that it is their water company's responsibility to provide them with information on precautions to take in winter.
- Of the other sources of information, SMEs are more likely to expect national government to provide information (31% of SMEs reporting this compared with 17% of domestic customers) and domestic customers were more likely to have expectations of local government.
- Although all groups of customers expected water companies to provide information, some differences exists for other sources:
  - Domestic customers in detached properties had higher expectations of DIY stores – 36%
  - Domestic customers in the Veolia Central (Three Valleys) region had higher expectations of local businesses – 19%
  - Micro SMEs (1-9 employees) had higher expectations of DIY stores – 24%
  - Organisations that consider water to be critical have higher expectations of the local council – 34%

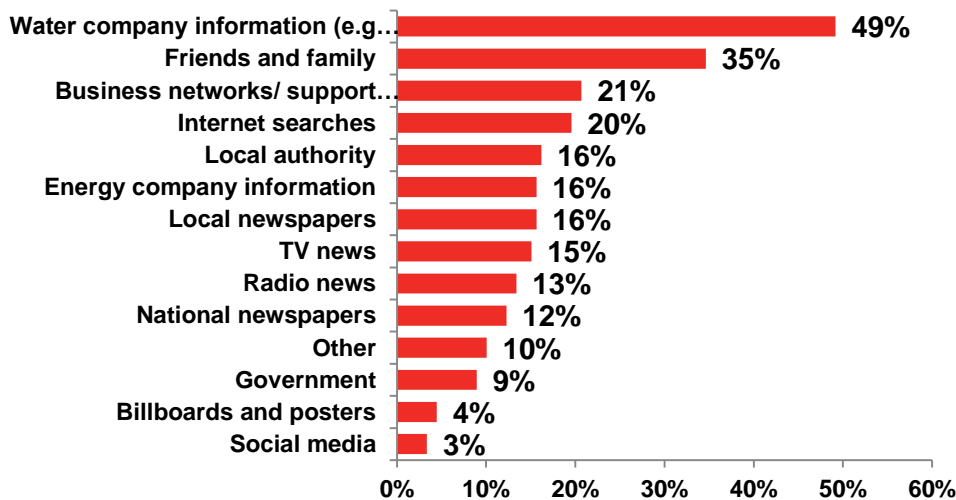
# Where have you heard information on winter precautions?

From which, if any, of the following have you heard about precautions you should take in winter to avoid frozen pipes at your home/ premises?

## All domestic customers who had heard something (base 509)



## All SMEs who had heard something (base 179)

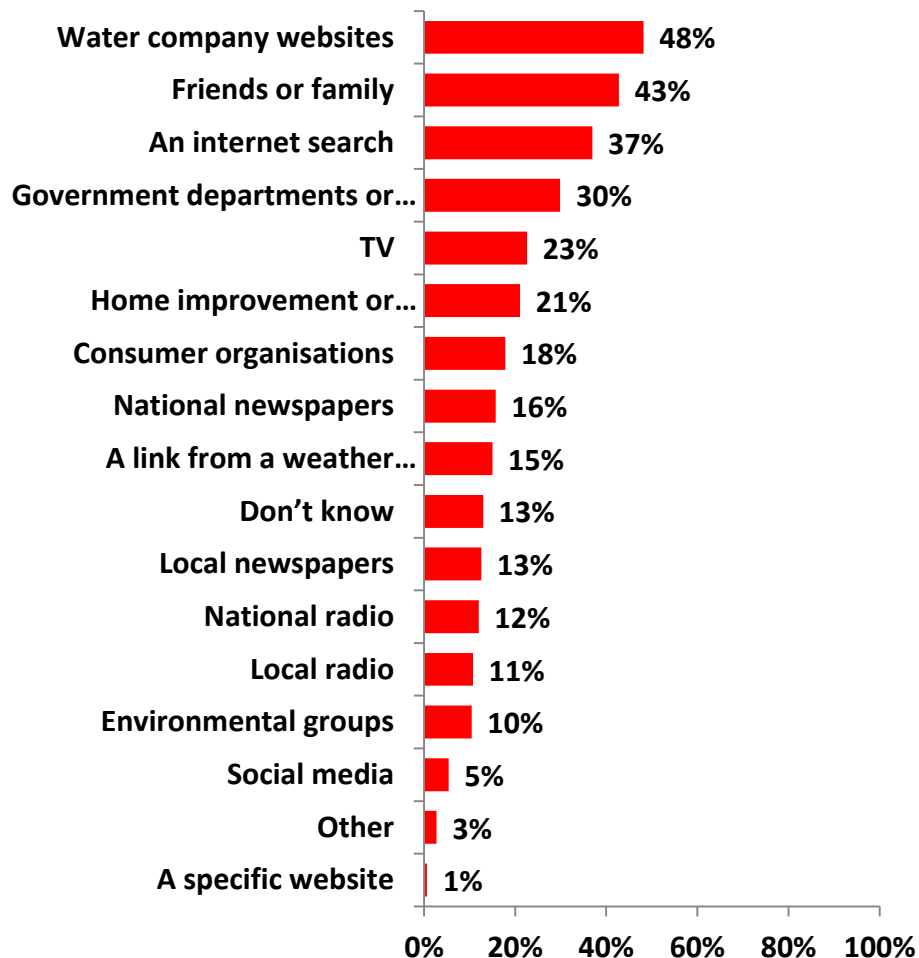


Base: All domestic customers who have heard something (n=509),  
All SMEs who have heard something (n=179).

- The majority of domestic consumers (55%) and SMEs (57%) had not heard anything from any source about precautions to take at winter.
- For domestic consumers, those aged 25-34 (61%), those people from a lower social grade (60%), those who live in a flat (61%) and those in the Thames Water region (65%) were more likely to have not heard anything.
- For SMEs the importance of water to their business correlates with whether they had heard any information on precautions in winter. Seven out of ten (68%) of SMEs who consider water not critical had not heard anything compared with 53% of those who consider water very critical.
- Given that the majority of SMEs and domestic consumers expect water companies to provide information, of those who had heard something (base of 509 for domestic customers and 179 for SMEs), only around half of SMEs and domestic consumers had heard about precautions from their water company.
- The importance of word of mouth is again shown in the fact that half (50%) of domestic consumers and over a third (35%) of SMEs had heard information from friends and family about precautions to take in winter.

# Which sources information on winter precautions would domestic customers take notice of?

If you wanted more information on precautions you should take in winter to avoid frozen pipes, which do you think you would take notice of?



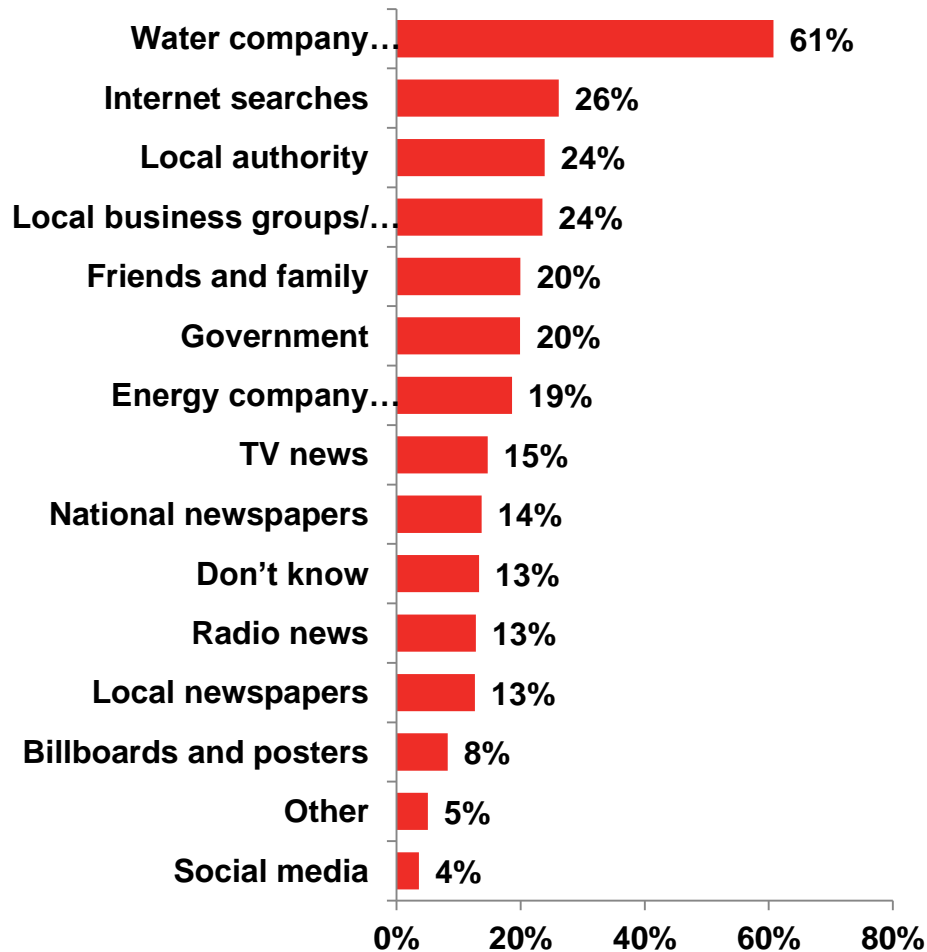
Base: All domestic customers (n=1,135)

- Water companies are the source of information that most people would take notice of, with 48% of domestic customers reporting that, if they wanted more information on precautions to take in winter, they would take notice of information from water companies.
- Friends and family (43%) and a more general internet search (37%) are also sources that would have an impact on domestic consumers.
- At this point social media is not a source of information to use to target customers, as just 5% report they would take notice of information provided through social media.
- In terms of differences by demographics:
  - People aged 45-54 are (45%) significantly more likely than 25-34 year olds (34%) and 55+ (33%) to take notice of internet searches.
  - People aged 25-34 (37%) are significantly less likely to take notice of water company websites.
  - People aged 55+ (17%) are significantly more likely to take notice of local newspapers.
  - People of a ABC1 social grade are more likely than those of a C2DE social grade to take notice of an internet search (40% compared with 32%), government departments (32% compared with 26%) and home improvement shops (23% compared with 18%).
  - People aged under 45 are more likely to take notice of TV (27%) than those aged 45+ (18%).



# Which sources information on winter precautions would SMEs take notice of?

If you wanted more information on precautions you should take in winter to avoid frozen pipes, which do you think you would take notice of?



Base: All SMEs (n=418)

- As with domestic customers, water companies are the source of information that most SMEs would take notice of. With 61% of SMEs reporting that, if they wanted more information on precautions to take in winter, they would take notice of water companies.
- Internet searches (26%), the Local Authority (24%) and local business groups (24%) are also sources that would have an impact on SMEs.
- Again as with domestic customers, at this point social media is not a source of information to use to target SMEs, as just 4% report they would take notice of information provided through social media.
- In terms of differences by business characteristics:
  - Micro organisations (1-9 employees) are more likely to take notice of billboards and posters than small and medium sized organisations (12% compared with 3%).
  - Private sector organisations (62%) are more likely than public and voluntary sector organisations (53%) to take notice of water company information.
  - Public and voluntary sector organisations are more likely to take notice of local government (32%) and national government (29%) than private sector organisations (22% and 18% respectively).

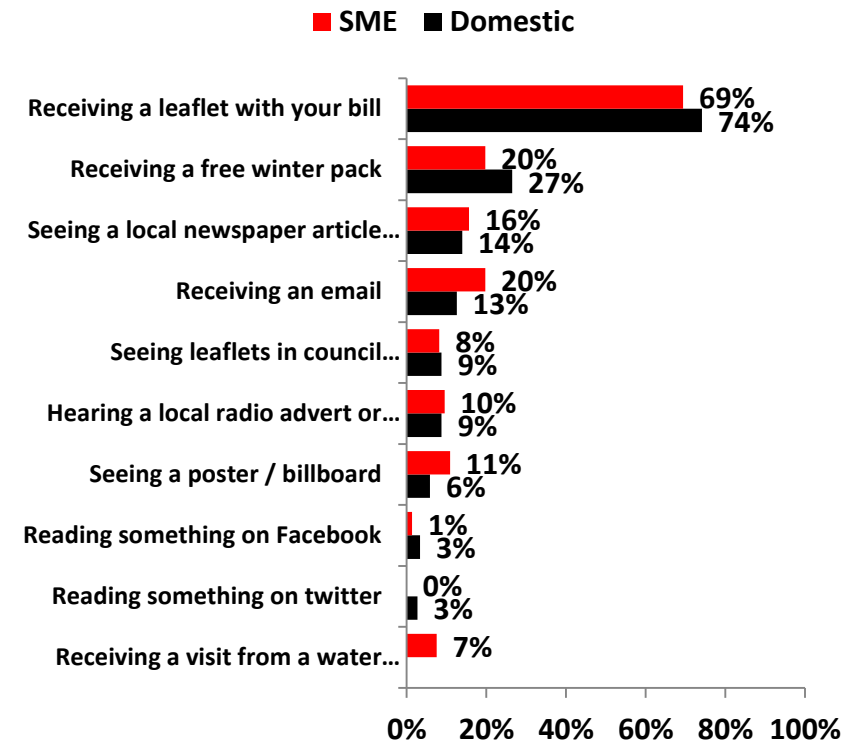
# Recall of information provided by the water company...

- The majority of both SMEs (65%) and domestic customers (61%) could not recall receiving any information from their water company on precautions to take in winter.
  - By water company area not being able to recall was highest for Welsh Water (68%), Thames Water (67%) and Northumbrian Water (65%).
- Of those people who could recall receiving information from their water company something (base of 445 for domestic customers and 147 for SMEs), receiving a leaflet with their bill was the most common source of information, for both domestic (74%) and SMEs (69%).
- Just over a quarter of domestic customers (27%) recalled receiving a free winter pack. For those regions where the base size allows further analysis, people receiving a winter pack were more likely to be in the Thames Water region (38%) or the United Utilities region (31%) than in the Severn Trent region (20%).
- SMEs were more likely to recall having received an email (20%) and one in ten (7%) had received a visit from a water company representative.

Thinking specifically about the information your water company might provide on precautions you can take in winter, which of the following, if any, can you recall?


- None of the below
  - SME – 65%
  - Domestic customers – 61%

Of those who could recall something.....



Base: All domestic customers who could recall something (n=445)  
All SMEs who could recall something (n=147)

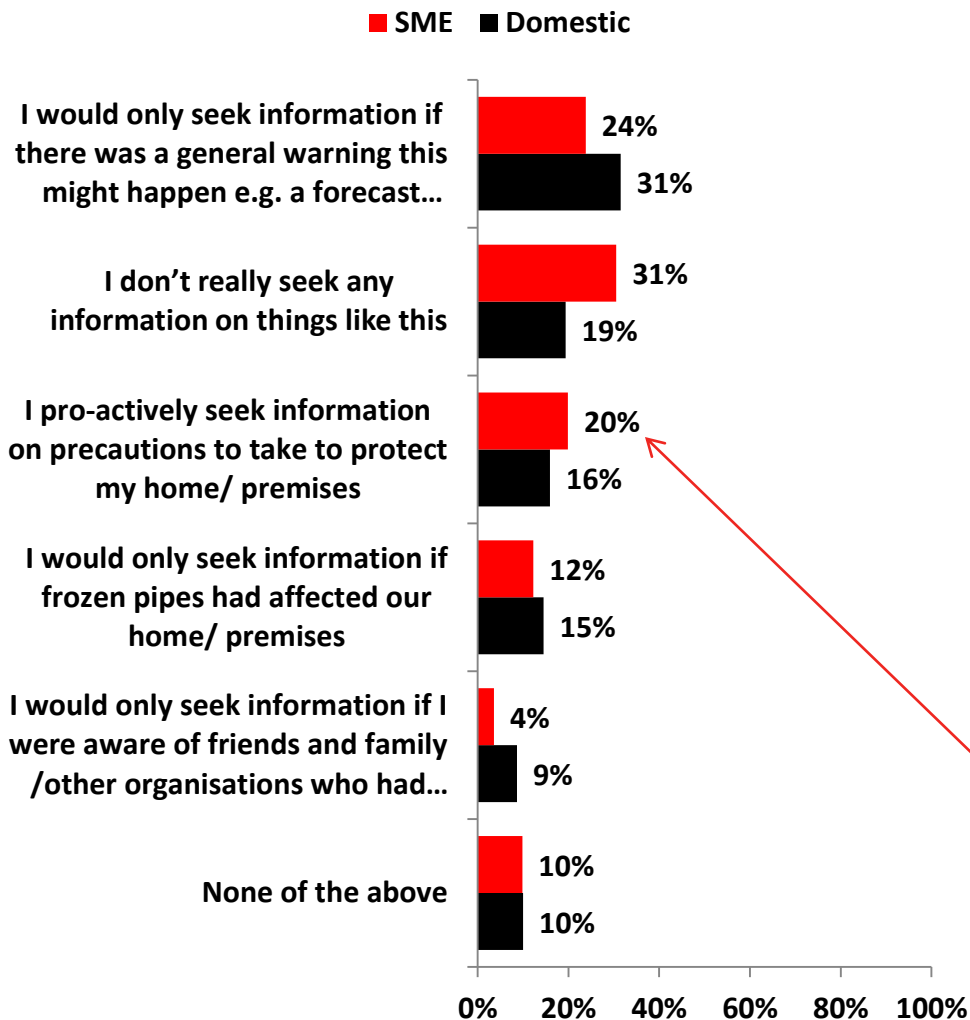




# Seeking information on winter precautions

# How do people seek information on winter precautions?

When it comes to finding out how to protect water pipes at your home/ premises from freezing, what kind of information seeker are you/ is your organisation?



Base: Domestic customers (n=1,135), SME (n=418).

- There is a very mixed picture on how pro-active domestic and SME customers are when seeking information on how to protect water pipes at their home/ premises.
- SMEs are more likely than domestic consumers to report that they don't really seek information on winter precautions (31% reporting this compared with 19% of domestic customers). But SMEs are more likely to also proactively seek information (20% reporting this compared with 16% of domestic customers).
- For both domestic customers and SMEs the warning of severe weather is likely to induce people to seek information, with 31% of domestic customers and 24% of SMEs reporting this to be the case.

For domestic customers, the older age groups are more likely to proactively seek information. 23% of over 55s would proactively seek information compared with just 7% of those aged 25-34.

Those in rented accommodation are significantly less likely to proactively seek information, with only 5% of renters reporting this.

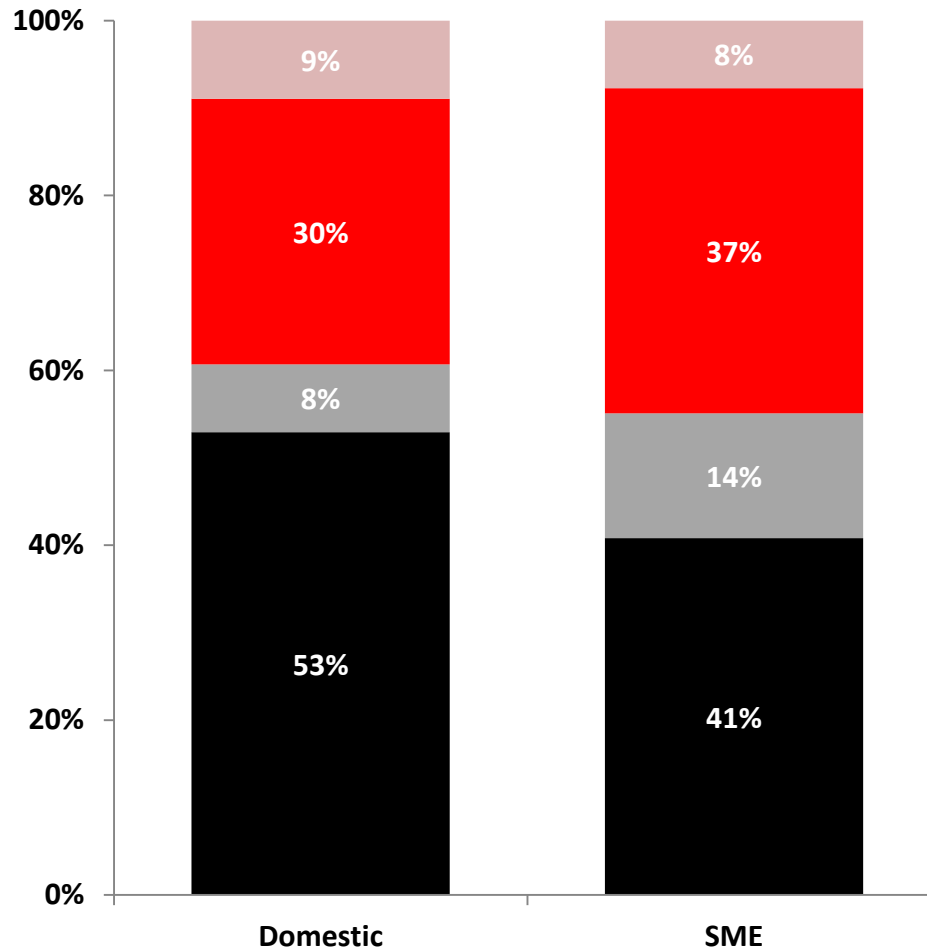
Public and voluntary sector employers (31%) are more likely to proactively seek information than private sector employers (18%).



# Does the perception of the risk of having a burst pipe influence future behaviour?

To what extent do you agree that 'the risk of having a burst water pipe at your home/ premises will make you /your organisation take more precautions in the future to protect pipes during winter'

■ Agree ■ Disagree ■ Neither agree nor disagree ■ Don't know



Base: Domestic customers (n=1,135), SME (n=418).

- For over half domestic customers (53%), a consideration of the risk of having a pipe burst at their home would make them take more precautions in the future to protect pipes during winter. A lower proportion (30%) disagreed that the perceived risk would make them take more precautions.
- The risk of having a burst pipe appears to have more influence on BME groups, with 65% agreeing they would take more precautions compared with 52% of people from the white British ethnic group.
- SMEs appear to place less importance on the risk of having a burst pipe, with 41% agreeing that this risk would make them take more precautions in the future to protect pipes during winter and 37% disagreeing.
- For SMEs, private sector organisations (39%) are less likely than public/ voluntary sector organisations (52%) to agree that the risk of having a burst pipe would make them take more precautions in the future to protect pipes during winter.



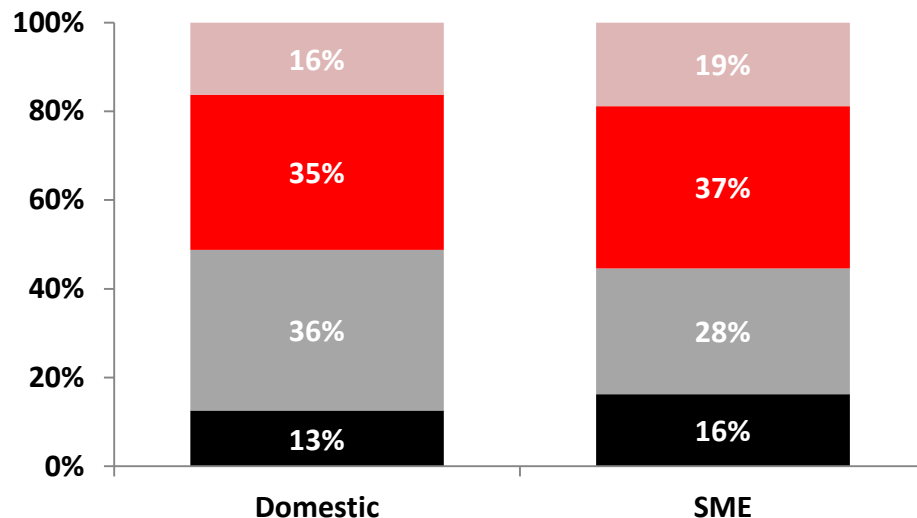


# Overall opinion of water companies

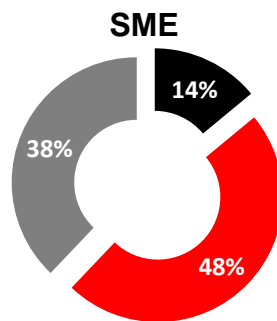
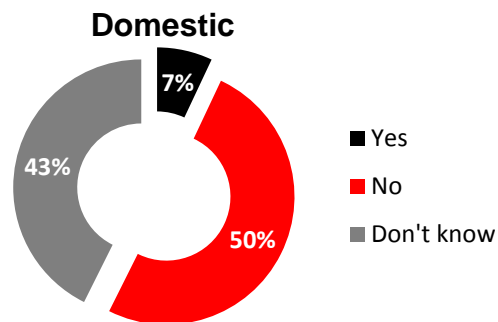
# What can water companies do to help me avoid frozen pipes?

To what extent do you agree or disagree that your water company is doing enough to inform you of what precautions to take to avoid frozen pipes in winter?

■ Agree ■ Disagree ■ Neither agree nor disagree ■ Don't know



Do you think that water companies do enough to avoid their own pipes and drains freezing in winter?



Base: Domestic customers (n=1,135), SME (n=418).

- Just 13% of domestic customers and 16% of SMEs agree that their water company is doing enough to inform them of what precautions to take to avoid frozen pipes in winter.
- Although many do not have a clear opinion on this issue, with 55% of SMEs and 51% of domestic customers reporting that they neither agree nor disagree or don't know.
- For domestic customers, agreement was higher for:
  - The over 55s (18%) than those aged 25-34 (11%) and those aged 35-44 (8%).
  - Those people who have had a frozen pipe (20%).
  - Those people in the Yorkshire Water region (18%) when compared to those from Thames Water (9%) and United Utilities (8%) areas.
- Half of domestic customers (50%) and 48% of SMEs don't think that water companies do enough to protect their own pipes and drains from freezing in winter.
- Just 7% of domestic and 14% of SME customers thought that water companies do enough to protect their own pipes and drains from freezing in winter.
  - Small and medium organisations (20%) were more likely than micro organisations (10%) to feel this.
  - Residents in the Northumbria Water area (18%) were also more likely to think that water companies do enough to protect their own pipes and drains from freezing in winter.





# Face to face survey findings





# Face-to-face survey of customers who have limited or no computer access

## Sources of information on home maintenance

- Interviewees were most likely to turn first to friends and family (72%), DIY stores (43%) and local newspapers (32%) for information on home maintenance.
- National radio (4%), consumer action groups (6%) and energy companies (8%) were the sources interviewees were least likely to turn to first for information on home maintenance. Eleven per cent of people would look to their water company first for information on home maintenance.
- In terms of trustworthiness, the vast majority of interviewees consider friends and family to be trustworthy (93% completely or somewhat trustworthy). DIY stores (69%), the TV (64%), local newspapers (61%) and water companies (61%) are also considered to be trustworthy.

## Concerns and preparation for winter

- The majority of interviewees (60%) were unconcerned about the prospect of their property being damaged over the next 12 months. The highest risk of damage to people's homes was perceived to be broken roof tiles (14%). One in ten (10%) interviewees felt there was a risk that pipes would burst inside or outside their home.
- Forty-five per cent of interviewees are not intending to do any home maintenance in time for winter. Where people did plan to do home maintenance type activities, servicing their boiler/ central heating was the most mentioned activity (19%). A further 13% mentioned they were intending to fix dripping taps. A small minority intended to check the lagging on pipes (6%), lag pipes (3%), check the quality of lagging on their water tank and to insulate their water tank (1%).
- With regards to being prepared for winter, 90% (of those where it applied to their property) reported that their water tank was insulated and 85% that their pipes were lagged.
- Overall, concern is low about water pipes at home freezing and potentially burst during the winter, with only 14% being worried that this may happen. The remaining 85% were unworried and 1% did not know.

## Experience of having a burst pipe

- Five per cent of interviewees had either suffered a burst pipe or a frozen pipe in the last 5 years. Of this very small number, 63% had insurance to cover for any damage and 25% felt it had caused severe disruption.
- When asked to think about the perceived damage that having a burst pipe would cause, 52% of those who have not had a burst pipe in the last 5 years felt it would cause severe disruption. A further 31% felt this would cause moderate disruption, 8% minor disruption and 3% no disruption.

# Face-to-face survey findings

## Reacting to frozen and burst pipes

- Overall, 59% of interviewees were confident that they knew what to do to avoid having frozen water pipes at their home in winter. A further 35% were not confident and 6% did not know. Males (73%) were more confident than females (51%). As were individuals who owned their property outright (75%) when compared to people who rent their property (51%).
- When given a prompted list of things to do to avoid frozen pipes, just 13% said they didn't know which of these they should do. The majority of people (59%) correctly recognised that you should insulate water tanks and lag pipes and 51% mentioned that you should leave your heating on low while away from the house. There was lower awareness that you should fix dripping taps (38%) and minimise draughts from outside (27%).
- With regards to the situation where a pipe freezes at home, a quarter (25%) of interviewees reported that they didn't know what to do. Women (34%) were more likely than men (12%) to say they didn't know what to do if a pipe freezes. Although the majority of interviewees (64%) correctly identified that you should turn off the stopcock and 38% that you should check to see if the pipe had burst. There was much lower awareness around what should be done to thaw out the frozen pipe, with just 11% mentioning you should thaw the tap with a towel soaked in hot water or thaw the pipe with a hair-dryer (11%) and just 6% that you should thaw the pipe with a hot water bottle.
- Only 6% of interviewees reported that they didn't know what to do if a pipe was to burst. Nearly half of people (49%) stated that you should call a plumber if a pipe bursts and 46% that you should turn off the stopcock. Thirty-two per cent said you should contact your local authority, 28% that you should turn off any electrical items near the leak and 27% that you should soak up any excess water. One in five interviewees felt they should contact their water company and just 4% that you should contact your energy provider.

## Providing information on precautions to take at winter

- The majority of people (68%) feel that the responsibility to provide information to help households protect the pipework in their house in the winter rests with their water company. The local council is the other source of information interviewees expected to provide information to help households protect the pipework, with 47% reporting this.
- However, over half (56%) of interviewees had not heard anything from any source about precautions they should take in winter to avoid frozen pipes. Given that there is an expectation that water companies and local authorities should be expected to provide information, just 15% of people had heard something from their water company and 8% had heard something from their local authority.



# Face-to-face survey findings

- When asked to think specifically about information their water company might provide on precautions you can take in winter, nearly half of people (47%) couldn't recall receiving anything. Of those interviewees who could recall receiving something from their water company, 72% mentioned receiving a leaflet with their bill and 16% mentioned seeing a local newspaper article on preparing pipes for winter. Very few people recalled seeing leaflets in council buildings (8%), receiving a free winter pack (6%), hearing a local radio advert or feature on preparing pipes for winter (3%) or seeing a poster/ billboard (2%).
- For three quarters of interviewees (76%) friends and family are the source of information that people would take notice of, if they wanted more information on precautions to take in winter to avoid frozen pipes. TV (24% mentioning) was the next source of information people would take notice of, followed by local newspapers (20%) and home improvement or garden shops (16%).
- Forty per cent of interviewees reported that they don't really seek any information on how to protect water pipes at their home from freezing. A further 20% reported that they would only seek information if frozen pipes had affected their home. The importance of previous experience or the risk of pipes bursting is supported by the fact that 57% of people agreed that 'the risk of having a burst pipe at my home will make me take more precautions in the future to protect them during winter' – just 9% disagreed with this.

## Overall view of water companies

- A slightly higher proportion of interviewees agreed (28%) that their water company was doing enough to inform them of what precautions to take to avoid frozen pipes in winter than disagreed (22%). However, half of people (50%) neither agreed nor disagreed or did not know whether their water company was doing enough.
- Men (37%) were more likely than women (23%) to feel their water company was doing enough to inform them of what precautions to take to avoid frozen pipes in winter.
- There was also a lack of knowledge around whether water companies were doing enough to protect their own pipes and drains from freezing in winter, with 50% of people reporting that they didn't know. Where people did have an opinion, a higher proportion (29%) felt their water company wasn't doing enough to protect their own pipes and drains from freezing in winter than felt they were doing enough (20%).





# Appendices

# Sample Breakdown – domestic customers

		Unweighted (n)	Weighted (n)
All		1135	1135
Age	18-24	20	36
	25-34	157	261
	35-44	162	222
	45-54	198	207
	55+	598	409
Gender	Men	541	556
	Women	594	579
Disabled	Disability	276	250
	No disability	676	289
Social grade	ABC1	711	705
	C2DE	424	430

		Unweighted (n)	Weighted (n)
Bill size	£300 a year or less	462	454
	£301 to £500	331	327
	£501 or more	141	139
Accommodation type	Detached house	289	245
	Semi-detached house	341	352
	Terraced house	285	302
	Flat or maisonette	158	184
	Other/ DK	62	51

# Sample Breakdown – domestic customers

		Unweighted (n)	Weighted (n)
Water and Sewerage Company Region	Anglian Water	102	104
	Dwr Cymru (Welsh Water)	59	60
	Northumbrian Water	54	55
	Severn Trent Water	162	163
	South West Water	44	44
	Southern Water	81	78
	Thames Water	155	167
	United Utilities	143	137
	Wessex Water	39	38
	Yorkshire Water	104	103



# Sample Breakdown – SMEs

		Unweighted (n)
All		418
Organisation size	1	38
	2-4	114
	5-9	89
	10-19	91
	20-49	38
	50-99	32
	100-249	15
	250-499	11
Sector	Private	350
	Public/ voluntary	64
	Other	4

		Unweighted (n)
Water and Sewerage Company Region	Anglian Water	43
	Dwr Cymru (Welsh Water)	22
	Northumbrian Water	3
	Severn Trent Water	63
	South West Water	18
	Southern Water	22
	Thames Water	77
	United Utilities	37
	Wessex Water	13
	Yorkshire Water	28
	Other	10

# Sample Breakdown – customers who have limited or no computer access

		Unweighted (n)
All		157
Age	Under 50	13
	50-59	10
	60-69	53
	70+	81
Gender	Men	60
	Women	97
Disabled	Disability	71
	No disability	86
Social grade	ABC1	24
	C2DE	133

		Unweighted (n)
Bill size	£300 a year or less	71
	£301 to £500	32
	£501 or more	14
	Don't know	22
Accommodation type	Detached house	13
	Semi-detached house	54
	Terraced house	35
	Flat or maisonette	39
	Other	16

# Sample Breakdown – customers who have limited or no computer access

		Unweighted (n)
Location	London	24
	South East/ Kent	24
	Yorkshire	16
	North West	16
	North East	16
	East Anglia	14
	South West	8
	East & West Midlands	25
	Wales	14