Water Matters: Household customers' views on their water and sewerage services 2013

Prepared for: Consumer Council for Water
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Date: May 2014

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Executive Summary

- This annual survey has been commissioned by the Consumer Council for Water (CCWater) since 2006 to assess customers' views on water and sewerage services in England and Wales and track changes in these views over time.
- Initially, the survey was based on nine Water and Sewerage Company (WaSC) regions in England, and the Water and Sewerage Company region in Wales. Since 2012 the survey has included the customers of Water only Companies (WoCs) in order to provide greater coverage across England and Wales of customers' views. Comparability with previous years is achieved by making comparisons at WaSC region level each year.
- A total of 5,805 telephone interviews were conducted with water and sewerage bill payers across England and Wales between 24 October 2013 and 6 January 2014[1]. At least 200 interviews were undertaken with customers of each WaSC and 150 with customers of each WoC.

Key Findings

Overall satisfaction with water and sewerage services remains high

- In 2013, 93% of respondents are satisfied overall with their water supply, a small increase from 90% in 2012.
- Overall satisfaction with sewerage services sees a small rise from 85% to 87% after three years of decline.

Satisfaction with value for money is declining

- Satisfaction with value for money of water services continues to fall: to 69% in 2013 from 71% in 2012, and now stands at a level last seen in 2009.
- Satisfaction with value for money of sewerage services has been stable since 2011 (ranging from 70-72%), and this year is 71%.
- As in previous years, customers in the South West of England (where water and sewerage bills are historically highest) are less satisfied with value for money than those in other regions. As in 2012, 52% are satisfied with water services; while satisfaction with sewerage services has increased to 54% (50%in 2012).

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[1] This represents the largest number of interviews ever conducted and as a result of the large sample size a change of one or two percent is statistically significant. However, consideration should be given to whether a significant change of just one or two percent is meaningful. In this respect it is more helpful to look at significant changes in conjunction with longer-term trends.

Fewer customers feel that the charges they pay are fair and affordable

- Since 2011 there has been a substantial, and year on year fall in the proportion of customers who feel their water and sewerage charges are fair. In 2013, less than six out of ten (54%) customers agree their water and sewerage charges are fair compared to 60% in 2012, and 67% in 2011.
- For the first time this year, affordability was calculated for all customers as well as separately for WaSC and WoC customers. Overall, 67% of all customers say the water and sewerage charges they pay are affordable (20% say charges are unaffordable).
- When looked at for WaSC customers across all the regions, 66% regard their water and sewerage bills as affordable, compared to 67% in 2012 and 74% in 2011.
- Amongst WoC customers 69% agree that their water and sewerage charges are affordable (This has fallen significantly since 2011 for both water (71% in 2012 and 78% in 2011) and sewerage services (70% in 2012 and 78% in 2011). This longer-term dip might be reflective of on-going economic pressures on households.
- Customers are more likely to perceive their bills as affordable if they are in the following types of households:
    - Metered (72%)
    - The household does not have someone with a long term illness/incapacity (70%)
    - From a higher socioeconomic group (72%)
    - Not on any benefits (70%)
    - Owner occupied (69%)
    - Living in one or two person households (70%)
    - From a white background (68%)
- Compared to 2012 there has been a sharp increase in the proportion of customers disagreeing that their charges are affordable: amongst WaSC customers this has increased significantly to 21% from 13% and amongst WoC customers this has increased to 18% from 11%.

Awareness of WaterSure/Welsh Water Assist has decreased, but awareness of services for elderly and/or disabled customers has increased

- Awareness of WaterSure has fallen back to a more typical level of 9% in 2013 after the 'high' of 12% in 2012.
- The proportion of customers who would like to know more about WaterSure is 12%, which is very similar to last year (11%).
- Awareness of water companies' services for the elderly and disabled has risen strongly over the past three years from 20% in 2011 to 31% in 2013. However, uptake remains static at 1-2%.

- Similar to the last two years, 8% would like to know more about the services available to the elderly and disabled.

Awareness of the free meter option has increased, but awareness of the right to switch back to a non-metered charge has fallen

- Awareness that, on request, water meters can be fitted free of charge has risen to 62% from 60% in 2012 amongst unmetered customers.
- But fewer unmetered customers (28%) know they can switch to a water meter on a trial basis compared to 34% in 2012.
- Around six in ten (58%) of those without water meters would apply for one under the 12 month trial scheme if they found it would save them money.

Fewer customers have taken measures to avoid frozen pipes

- The proportion of customers who have done something to avoid having frozen pipes has fallen to 46% from 55% in 2012.
- Older people are more likely than younger people to have taken measures (50% of those aged 61+ compared to 26% of 18-34s). There were no marked differences by region.

Awareness of the Guaranteed Service Standards compensation scheme is stable

- Customers' awareness of the minimum service standard compensation scheme remains virtually unchanged at 43% in 2013 from 44% in 2012.

The number of households using less water has fallen slightly

- In previous surveys, customers have been asked if they do anything to use less water, and if so, what. This year for the first time, customers were asked if they have made a 'conscious decision' to use less water, and if so, what.
- Many more metered customers (72%) than non-metered customers (59%) say they made a conscious decision to save water. The main motivation to save water amongst metered customers is financial (41%).
- The top three water saving actions are: taking showers instead of baths (which is down to 25% from 36% in 2012), using water butts in the garden (18% this year compared to 13% in 2012) and turning off taps when brushing teeth (down to 16% from 27% in 2012). However, just under a third (30%) of those who said they take a shower to save water indicated that they used a power shower, which may actually use more water than a bath and suggests a low level of awareness around water saving activities.

There is increasing confusion about what should/should not be disposed of down the toilet, sink or drain

- Every year a list of items is read out to respondents, none of which should be disposed of down the toilet, sink or drain. In 2013, 43% thought that one or more of these items could be disposed of in this way compared to 40% in 2012.

Awareness of who is responsible for maintaining sewers and drains remains low

- There is still confusion among customers over who is responsible for maintaining sewers and drains that run within their property's boundaries.
- Whilst there is a fall in the proportion of customers who incorrectly think they are responsible for sewers and drains in company ownership (33% compared to 42% in 2012), this is not matched by an increase in those who correctly identify the sewerage company as responsible (28% compared to 30% in 2012).
- Instead there is a corresponding increase in the proportion who 'don't know' who is responsible. This has increased to 21% from 12% in 2012.

Mixed views on how financial benefits should be spent

- Customers were asked how they would prefer their water and/or sewerage company to share any potential financial benefits with customers. 'Spend more on improving services that customers think are important', was the most popular response (50%), followed by 'provide more financial help to customers on low incomes' (42%) and 'provide a one-off rebate to all customers' (32%).

Water and sewerage companies seen as more caring than energy suppliers

- Positively, suppliers of water and sewerage services (63%) continue to be seen as more caring than energy suppliers (53%). These findings have been relatively stable for a number of years.
- Customers were asked how much they trust their water and/or sewerage company and energy company on a scale of one to ten (1 = no trust and 10 = complete trust). Average trust scores have remained fairly constant for water and sewerage over the last five years (around 7.2 to 7.3), but trust in energy suppliers continues to decrease (down to 6.5 in 2013 from 7.2 in 2010).

Representation by a consumer body is still considered important

- Customers still believe that it is important to have a consumer body representing their interests about the water and sewerage services they receive. In total, 93%

of customers feel consumer representation is absolutely essential, very important or fairly important, compared to 94% in 2012.

- There has been a dip to 70% from 75% in 2012 in customers who feel representation of customers is absolutely essential or very important.

Key differences between findings in England and Wales

- Where previously satisfaction with value for money for water services in England and Wales has been similar (70% and 74% respectively in 2012), this gap has widened slightly in 2013 with customers in Wales being even more satisfied (78%) than customers in England (69%).
- Customers in Wales report higher levels of satisfaction with value for money for sewerage services than those in England. In Wales, 79% were satisfied, as opposed to 70% in England.
- Customers in Wales are significantly more likely to regard their water and/or sewerage charges as fair (59%) compared to England (54%).
- Customers' trust in their water/sewerage company is higher in Wales. Using a ten point scale customers in Wales scored 7.6 compared to 7.3 in England.
- Satisfaction with water hardness/softness was higher in Wales (90%) than in England (66%).
- Satisfaction with reducing smells from sewerage works was higher in Wales (70%) than in England (70%).
- Customers in Wales (47%) were also more supportive of the option to use profits gained from water companies doing better than expected to provide financial help to those on low incomes than customers in England (41%).

Findings from Key Driver Analysis of services measures

- A range of aspects of water and sewerage services (e.g. water pressure, sewer flooding management) were tested in key driver analysis to see which are most important in determining customers views on value for money.
- This analysis found that perceptions of value for money of these services are not strongly driven by the delivery of the service itself.
- However, when it comes to satisfaction with contact, ease of contact and being kept informed of progress are strong drivers of overall satisfaction.
- For satisfaction with water supply, water quality and water pressure are moderate drivers of satisfaction.
- The main drivers for satisfaction with sewerage services are perceptions of sewer flooding reduction and maintenance of sewerage pipes – but again these are moderate rather than strong drivers.

Cluster analysis revealed four customer segments

- For the first time this year Cluster Analysis was undertaken on the results of the survey. Four clusters of response type were identified based on responses to composite questions about satisfaction with water and sewerage services, satisfaction with value for money of water and sewerage services, affordability and fairness of charges:
  - Cluster 1: This cluster is very satisfied with value for money, services, affordability and fairness and is the largest at 46% of the population of customers.
  - Cluster 2: This cluster is neutral to satisfied with value for money, services, affordability and fairness. This cluster is the second largest and makes 24% of customers.
  - Cluster 3: This cluster is dissatisfied with value for money, affordability and fairness, but have a range of views on service from satisfied to dissatisfied. This cluster makes up 16% of customers.
  - Cluster 4: This cluster is neutral / satisfied with service and affordability, neutral on value for money but feel their charges are unfair. This cluster makes up 14% of customers.

1. Introduction

1.1 Background

1.1.1 The Consumer Council for Water (CCWater) has been the voice of consumers of water in England and Wales since its launch on October 1 2005. CCWater operates through four committees in England and a committee in Wales.

1.1.2 CCWater wants consumers to receive (and to be able to recognise that they receive) high standards and value for money in water and sewerage services, comparing well with the best of other service sectors.

1.1.3 Monitoring consumer opinion towards water and sewerage services was recognised as an important exercise early in CCWater's history and a consumer survey has been conducted annually since 2006. This tracking survey along with other CCWater research and Forward Programmes has identified five key consumer priorities:

- Value for Money – a fair, affordable price and charging system
- Right First Time – problems sorted out quickly without hassle
- Water on Tap – a safe secure reliable supply of water used wisely
- A Sewerage System that Works – responsible removal of sewage, prevention of sewer flooding and reduction in persistent smells from sewage treatment works
- Speaking up for Water Consumers – being influential in achieving improvements for consumers

1.1.4 Research[2] has found that consumers expect CCWater to be accountable to them and demonstrate where its activities have added value, to recognise that consumers have no choice about who supplies their water and sewerage services, and to make themselves known to consumers.

1.1.5 This research is the eighth of CCWater's annual tracking surveys; the first was conducted by ORC International in 2006, then FDS International between 2007 and 2009, DJS Research in 2010 and 2011 and by Accent in 2012. The 2013 survey has been conducted by SPA Future Thinking (formerly FDS International).

1.1.6 Each tracking survey provides valuable insights into customers' views on water and sewerage services over time. A comparison of the findings

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[2] Report on Expectations of the Consumer Council for Water. Available at: http://www.ccwater.org.uk/wp-content/uploads/2014/01/Expectations-of-The-Consumer-Council-for-Water-.pdf

identifies and tracks any changes in customers' concerns about all aspects of water and sewerage services and their priorities for action.

1.1.7 The survey was initially based on nine Water and Sewerage Company (WaSC) regions in England, and the Water and Sewerage Company region in Wales. Since 2012 the survey also includes the customers of Water only Companies (WoCs) so that company specific findings are available while maintaining comparisons between WaSC regions.

1.2 Research Objectives

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

- customers' views about all aspects of water and sewerage services
- customers' concerns and satisfaction with the delivery of water and sewerage services, and;
- how customers' views change over time.

1.2.2 The specific research objectives are to provide, for each WaSC, WoC and each WaSC region[3], a benchmark of customers':

- understanding of their rights and responsibilities in relation to CCWater's five key themes
- perceptions of value for money of water and sewerage services
- satisfaction with service delivery by the water industry, identifying concerns and priorities for action
- expectations for service delivery by the water industry, identifying areas for service improvement

1.2.3 CCWater will further use the research findings to:

- provide greater legitimacy in representing customers
- provide a stronger evidence base on which to make policy decisions, and gauge customers' concerns and satisfaction with delivery of water services

[3] WaSC regions comprise the area served by each WaSC, i.e. where they provide water and sewerage services or sewerage services only. For example, Wales as a WaSC region comprises all Welsh Water customers and all Dee Valley customers.

- develop an effective communications strategy
- determine how it has added value or made an impact by measuring service provision and consumer perception of CCWater's impact and performance.

1.3 Methodology

1.3.1 The research was conducted via telephone with a randomly selected sample of households across England and Wales.

1.3.2 Interviews were conducted with individuals who are responsible, either solely or jointly, for paying their household's water bill.

1.3.3 The main fieldwork took place between 24 October 2013 and 6 January 2014.

1.3.4 A total of 5,805, 20 minute telephone interviews were completed. CCWater commissioned 200 interviews per WaSC and 150 per WoC. However, 9 water companies opted to boost their customer sample by between 150 and 300 interviews, increasing the sample by a further 1,850 to 5,805.

1.3.5 This represents the largest number of interviews ever conducted and as a result of the large sample size a change of one or two percent is statistically significant. However, consideration should be given to whether a change of just one or two percent is meaningful. In this respect it is helpful to look at longer term trends alongside any statistically significant changes from last year.

1.3.6 The questionnaire was largely similar to previous years, although it included a small number of new questions and dropped a few questions used in previous years, to ensure that the survey addresses emerging issues as well as on-going issues that may be of interest to water customers.

1.3.7 The findings for each water company are not included in this report, but are published on CCWater's website:

http://www.ccwater.org.uk/waterissues/himcd/

1.4 Analysis

1.4.1 Analysis has been conducted largely by total sample (England and Wales combined), by country (England vs. Wales), and by WaSC region (WoC respondents were assigned to a WaSC region according to their postcode).

1.4.2 As in previous reports comparisons are made between different WaSC regions. Readers should note that the margins of error for regions will vary depending on the sample size, and that caution is required in interpreting the results. This is also the case when comparisons are made between different years at the WaSC region level. Figure 1 shows the margins of error for each WaSC region.

1.4.3 Demographic analysis is included where base sizes are large enough to allow for reliable comparisons. Access to the internet has not been included as a variable in the analysis, because access is virtually universal amongst those under 60 years. The impact of this is that a comparison of users and non-users is similar to analyses based on age of the respondent.

1.4.4 During the fieldwork there was considerable media attention on utility prices. Analysis of different time periods related to media activity did not show significant changes in respondents' answers.

1.4.5 As in previous reports comparisons are made with survey results in previous years. Readers should note that the demographic characteristics of the sample are not weighted and that some of the variation between results may be due to variations in the achieved sample.

1.4.6 Data are weighted according to figures provided by CCWater reflecting the number of connections (water and sewerage or water only, as appropriate) per company, to enable comparison by WaSC region.

1.4.7 The data are weighted to be representative of each WaSC region. Weighting by WaSC region adjusts for the difference in sample sizes across the WaSC region and enables level comparisons to be made. All charts show weighted data and give the unweighted base size.

1.4.8 Only statistically significant differences are discussed in the report. The table overleaf shows the statistical reliability of results for total base sample sizes of 5,805, and national and regional reliability.

Figure 1: Margin of error for results at …

	Sample size	10% or 90%	30% or 70%	50%
Total	5,805	0.8	1.2	1.3
England	5,465	1.1	1.6	1.7
Wales	340	3.2	4.9	5.3
Eastern	806	2.1	3.2	3.5
Northumbria	553	2.5	3.8	4.3
Midlands	548	2.5	3.8	4.2
South West	358	3.1	4.8	5.2
Southern	700	2.2	3.4	3.7
Thames	911	2.0	3.0	3.3
North West	211	4.1	6.2	6.8
Wessex	877	2.0	3.0	3.3
Yorkshire	501	2.6	4.0	4.4

1.4.9 The report refers to socio-economic grades, grouped as ABs, C1C2s and DEs. These are defined as follows:

Figure 2: Socio-economic grade definitions.

Socio-economic group	Definition
A	Higher managerial/ professional/ administrative
B	Intermediate managerial/ professional/ administrative
C1	Supervisory or clerical/ junior managerial/ professional/ administrative, student
C2	Skilled manual worker
D	Semi or unskilled manual work
E	Casual worker, not in permanent employment, Looking after the home, Retired and living on state pension, Unemployed or not working due to long-term sickness, Full-time carer of other household member

2. Value for money

This chapter presents customers' views on a number of issues relating to value for money of the services they receive. These include perceptions of value for money of water and sewerage services, and perceptions on the fairness and affordability of water and/or sewerage bills.

SUMMARY

Key trends

- Satisfaction with value for money of water services has been falling since 2011, and at 69% now stands at the lowest level for four years.
- Satisfaction with value for money of sewerage services has been relatively stable since 2012 and is at 71%.
- Compared to a range of other utilities, customers continue to place water and sewerage in the middle position in terms of value for money
- The proportion of customers who feel their water and sewerage charges are fair has fallen considerably over the last three years from 67% in 2011 to 54% in 2013.
- When looked at for WaSC customers only, 66% regard their water and sewerage bills as affordable, compared to 67% in 2012 and 74% in 2011. A fifth (21%) now disagree that their charges are affordable up from 12% since 2011. Amongst WoC customers the combined figure for water and sewerage is 69% in 2013, significantly down from 78% for both services (separately) in 2011.
- The proportion of customers who say they would be likely to contact their water/ sewerage company if worried about paying their bill has fallen year on year from 80% in 2010 to 67% in 2013.
- Two thirds (66%) of those who disagree their charges are affordable would be likely to contact their company if worried about paying their bill.
- Compared to 2012 there has been a sharp increase in the proportion of customers disagreeing that their charges are affordable: amongst WaSC customers this has increased significantly to 21% from 13% and amongst WoC customers this has increased to 18% from 11%.

Key changes since 2012

- Dissatisfaction with value for money of water services has increased from 11% in 2012 to 14% in 2013.

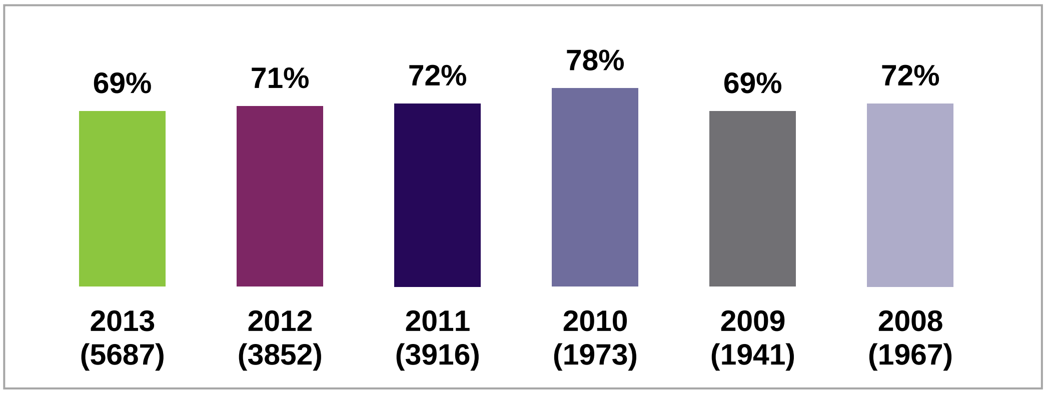
New analysis findings

- This year for the first time the affordability measure was combined across WaSC and WoC customers. Just over two-thirds (67%) of all customers agree that their charges are affordable.
- There is no strong 'value for money personality' for water or sewerage. Demographics and other factors have little influence on perceptions of value for money.
- Key driver analysis to determine the main factors that influence customers' perceptions of value for money of water and sewerage services concluded that aspects of water and sewerage quality are positively linked to perceptions of value for money, but that these are weak drivers. It is likely (although not tested) that price would be a stronger driver of customers' perceptions of value for money.

2.1 Value for money of water services

2.1.1 In 2013 fewer than seven in ten customers (69%) are satisfied with the value for money of water services, compared to 71% in 2012. Satisfaction has been falling since 2010 and now returns to the level seen in 2009. There is also a slight decrease in the proportion of customers who are 'very satisfied', down to 26% from 28% in 2012.

Figure 3: Satisfaction with the value for money of water services
Q7: Thinking first about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?



Base: All respondents (Excluding DK)

2.1.2 The proportion of customers who are dissatisfied with value for money of water services has increased to 14% from 11% in 2012.

2.1.3 As with 2012, there remains a link between satisfaction with water supply and satisfaction with value for money (100% of those who are very or fairly satisfied with value for money of water services are satisfied overall with their water supply); this is an increase from 96% in 2012.

2.1.4 Customers' reasons for being dissatisfied with value for money of water services even though they are satisfied with service provision include: cost / price rises (60%), price isn't fair (23%), and profits are too high (11%).

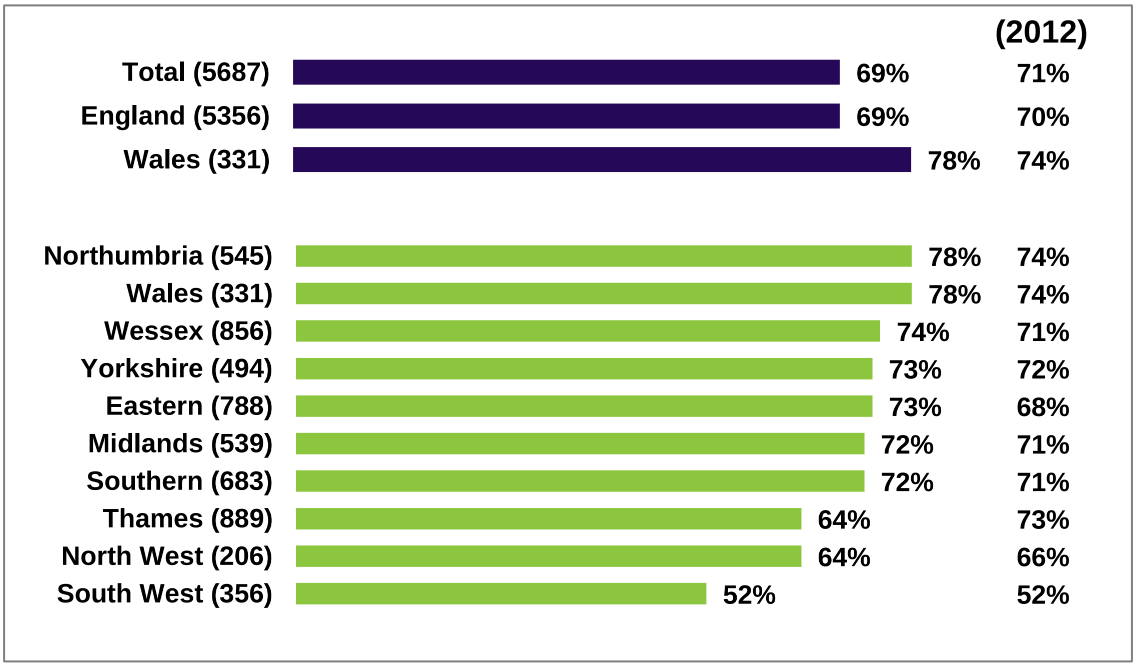
2.1.5 Customers who have contacted their water company continue to be more dissatisfied with the value for money of water services than those who have not (21% compared to 12% – compared to 20% and 9% respectively in 2012). Those that are dissatisfied with contact are considerably more likely to be dissatisfied with value for money (55%) compared to those who are satisfied (13%).

2.1.6 Metered customers are more likely to be satisfied (73%) than unmetered (66%). And among all those with a meter, those that had requested a meter are more satisfied (77%) than those whose property already had a meter (70%) or those compulsorily metered (66%).

2.1.7 Satisfaction with value for money of water services was slightly higher in Wales (74%) than in England (70%) in 2012; but in 2013, this gap has widened, with customers in Wales now even more satisfied (78%) than customers in England (69%). Similar to 2012, customers in Wales are also significantly more likely to be 'very' satisfied than those in England (36% compared to 27% in 2012; and 37% compared to 25% in 2013).

Figure 4: Satisfaction with the value for money of water services by country and region

Q7: Thinking first about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?



Base: All respondents (Excluding DK)

2.1.8 Across WaSC regions, satisfaction since 2012 has been generally stable or increased slightly. The exception is Thames WaSC region where there has been a 9% drop in the satisfaction score to 64%, and North West where there has been a smaller fall of 2%.

2.1.9 In keeping with the trend from previous years, customers in the South West (where water and sewerage bills are historically highest) are least satisfied with value for money. As in 2012, 52% are satisfied with water services; while satisfaction with sewerage services has increased to 54% (50%in 2012).

2.1.10 Customers aged 61+ years are still more satisfied with value for money of water services than other age groups.

2.1.11 When the (dis)satisfaction levels of customers are considered in conjunction with certain socio-demographic characteristics (Figures 5 and 6), some significant differences are visible for customers who are very satisfied or very dissatisfied (marked in yellow). However, there is no strong 'value for money personality' for water. Those indicating high or low (dis)satisfaction with value for money are only weakly associated with socio-demographic and other factors.

Figure 5: Satisfaction with the value for money of water services by socio-demographic category (% very satisfied)

Q7: Thinking first about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?

Total	All	26%
Region	England (a)	25%
	Wales (b)	37%
Age	18-34 (a)	23%
	35-44 (b)	21%
	45-60 (c)	22%
	61-74 (d)	27%
	75+ (e)	35%
Retired	Retired (a)	31%
	Not retired (b)	21%
Social grade	AB (a)	22%
	C1C2 (b)	25%
	DE (c)	31%
Gender	Male (a)	24%
	Female (b)	28%
HH Composition	1 person household (a)	33%
	2 person household (b)	26%
	1 parent family (c)	21%
	2 parent family (d)	20%
	Other (e)	22%

Total	All	26%
Tenure	Owner occupied/leaseholder (a)	25%
	Private renter (b)	25%
	Social renter (c)	33%
	Net: Renter (d)	30%
Internet access	Yes (a)	24%
	No (b)	36%
Meter	Property had meter already (a)	23%
	Requested meter (b)	36%
	Compulsory metering (c)	21%
	Net: Metered (d)	29%
	Net: Unmetered (e)	23%
Aware of Water Sure	Yes (a)	33%
	No (b)	25%
Aware of services for the elderly	Yes (a)	30%
	No (b)	24%
Contact with company	Yes (a)	22%
	No (b)	27%

Base: All respondents (Excluding DK): 5687

Figure 6: Satisfaction with the value for money of water services by socio-demographic category (% very dissatisfied)
Q7: Thinking first about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?

Total	All	6%
Ethnicity	White (a)	5%
	Non-white (b)	9%
Disability or long-term health condition	Yes (self) (a)	8%
	Yes (other) (b)	7%
	Net: Yes (c)	8%
	No (d)	5%
Gender	Male (a)	7%
	Female (b)	4%
HH Composition	1 person household (a)	6%
	2 person household (b)	5%
	1 parent family (c)	4%
	2 parent family (d)	7%
	Other (e)	7%

Total	All	6%
Tenure	Owner occupied /leaseholder (a)	5%
	Private renter (b)	8%
	Social renter (c)	7%
	Net: Renter (d)	7%
Household on benefits	Yes (a)	8%
	No (b)	5%
Area	Urban (a)	5%
	Rural (b)	6%
	Suburban /Semi-rural (c)	7%
Contact with company	Yes (a)	9%
	No (b)	5%

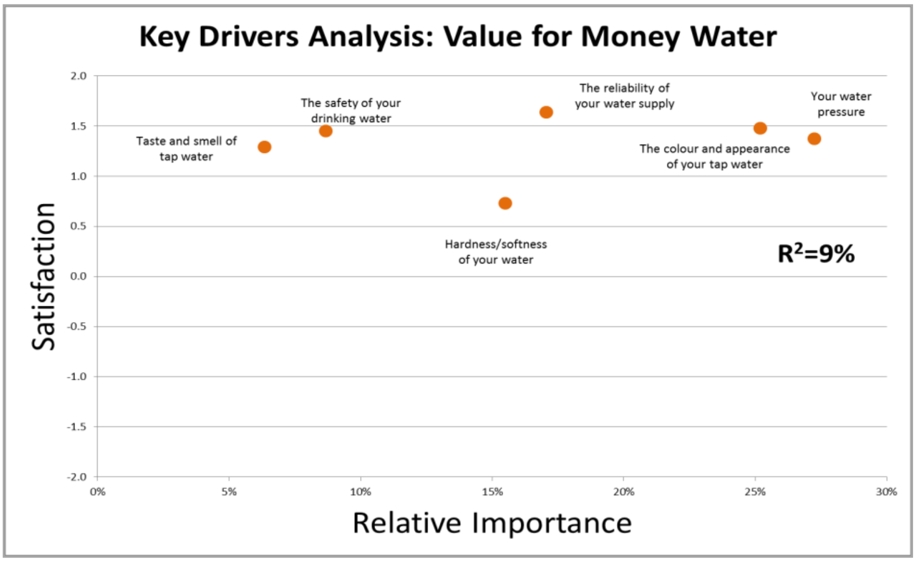
Base: All respondents (Excluding DK): 5687

2.2 Key driver analysis of satisfaction with value for money of water services

2.2.1 Key driver analysis was undertaken to determine which aspects of the water supply service most influence customers' perceptions of value for money.

2.2.2 Water pressure and the colour and appearance of tap water have the biggest influence, although taken together they do not *strongly* influence views on value for money (which is indicated by the R^2 measure on Figure 7). Although this analysis was not carried out, it is likely that price would be a stronger driver of customers' perceptions of value for money of water services than aspects of the service itself.

Figure 7: Key drivers of overall satisfaction with value for money of water services



Satisfaction scores are calculated as an average of scores ranging from -2 to +2, where +2 is very satisfied, +1 is fairly satisfied, 0 is neither satisfied nor dissatisfied, -1 is fairly dissatisfied and -2 is very dissatisfied.

Definition of R^2:

- R^2 is an index ranging from 0 to 100%.
- It is the proportion of those satisfied with value for money of water services that is explained by these aspects of water quality.
- When R^2 is a small number e.g. less than 20% this means that the drivers (i.e. aspects of water service) do not explain a high proportion of the outcome – thus they are less useful in predicting and modelling the dependent variable.

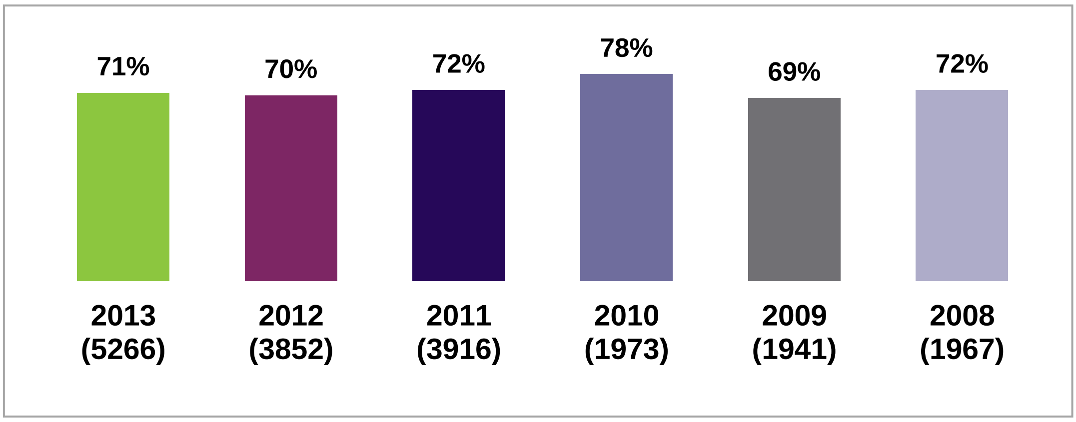
- In market research, an R^2 between 40% and 60% means that the aspects tested are a good explanation for the findings. .

2.3 Value for money of sewerage services

2.3.1 Just more than seven in ten (71%) customers are satisfied with the value for money of sewerage services. Satisfaction has been relatively constant over the last three years. The proportion of those who are 'very satisfied' is 26% compared to 27% in 2012.

Figure 8: Satisfaction with value for money of sewerage services

Q8. How satisfied or dissatisfied are you with the value for money of the sewerage services in your area?



Base: All who use sewerage services (Excluding DK)

2.3.2 As in 2012, there is a strong link between satisfaction with sewerage service and satisfaction with value for money: 93% of those who are very or fairly satisfied with value for money for sewerage services are satisfied overall with their sewerage service.

2.3.3 Customers' reasons for being dissatisfied with value for money of sewerage services even when they are satisfied with service provision include: cost / price rises (64%), the price isn't fair (25%), and profits are too high (9%).

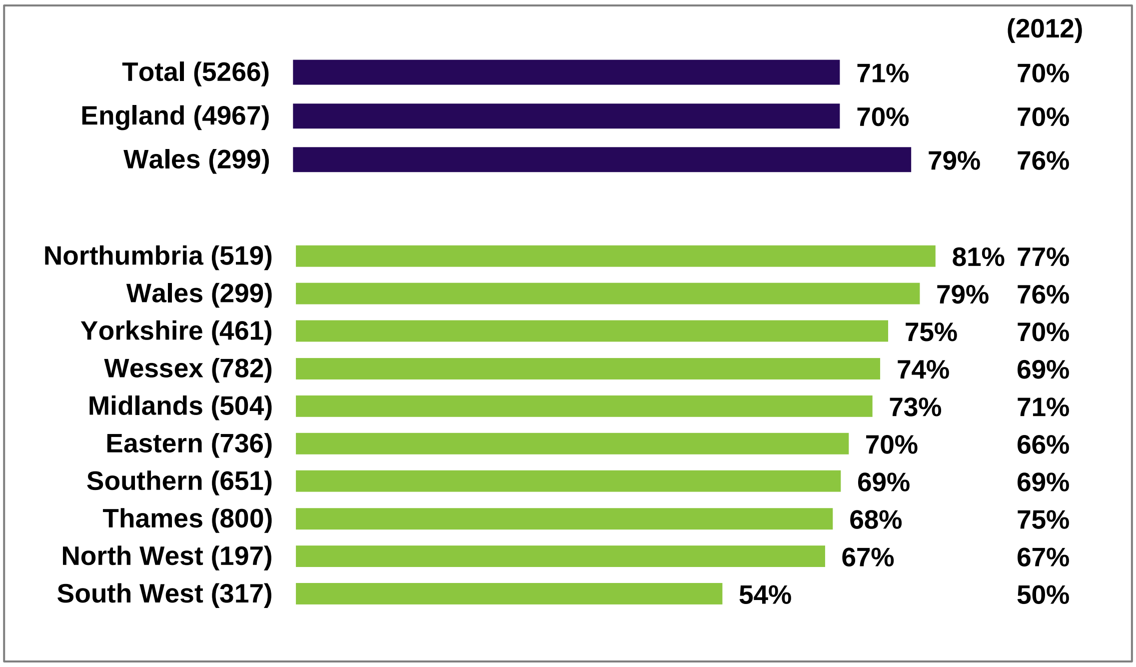
2.3.4 A trend that has held true for a number of years is that those who have contacted their sewerage company are significantly more likely to be dissatisfied with value for money of sewerage services (18% who contacted the company compared to 11% who didn't). In addition, those who are dissatisfied with contact (42% compared to 12%) are significantly more likely to be dissatisfied with value for money for sewerage services.

2.3.5 Metered customers are more likely to be satisfied (73%) than unmetered (69%). Amongst all those with a meter, those that had requested a meter are more satisfied (77%) than those who compulsorily had a meter fitted (65%) or whose property already had a meter (69%).

2.3.6 Customers in Wales report higher satisfaction with value for money than last year up 3% to 79%; while in England this is unchanged from last year at 70%. In Wales, 37% were very satisfied, as opposed to 25% in England.

Figure 9: Satisfaction with the value for money of sewerage services by country and region

Q8. How satisfied or dissatisfied are you with the value for money of the sewerage services in your area?



Base: All who use sewerage services (Excluding DK)

2.3.7 Customers in Northumbria region are the most satisfied with the value for money of their sewerage services (81%) and South West region the least satisfied (54%). Although the South West is still the least satisfied region, satisfaction has again increased in 2013, although not by the margin it did in previous years (39% in 2011; and 50% in 2012).

2.3.8 Satisfaction in the Thames region has fallen 7% to 68%; while satisfaction in Yorkshire (75%) and Wessex (74%) has increased.

2.3.9 Customers aged 75+ years continue to be significantly more satisfied with the value for money for sewerage services than other age groups.

2.3.10 When the (dis)satisfaction levels of customers are considered in conjunction with socio-demographic characteristics (Figures 10 and 11), some significant differences are apparent for customers who are very satisfied or very dissatisfied (marked in yellow). However, there is no strong evidence for a 'value for money personality' for sewerage. Those indicating high or low (dis)satisfaction with value for money are only weakly associated with socio-demographic and other factors.

Figure 10: Satisfaction with the value for money of sewerage services by demographic/socio-economic category (% very satisfied)

Q8: How satisfied or dissatisfied are you with the value for money of the sewerage services in your area?

Total	All	26%
Region	England (a)	25%
	Wales (b)	37%
Age	18-34 (a)	21%
	35-44 (b)	22%
	45-60 (c)	24%
	61-74 (d)	25%
	75+ (e)	36%
Retired	Retired (a)	30%
	Not retired (b)	22%
Social grade	AB (a)	23%
	C1C2 (b)	26%
	DE (c)	29%
Gender	Male (a)	24%
	Female (b)	28%
HH Composition	1 person household (a)	32%
	2 person household (b)	26%
	1 parent family (c)	19%
	2 parent family (d)	19%
	Other (e)	23%

Total	All	26%
Tenure	Owner occupied/leaseholder (a)	25%
	Private renter (b)	25%
	Social renter (c)	34%
	Net: Renter (d)	30%
Internet access	Yes (a)	24%
	No (b)	36%
Meter	Property had meter already (a)	23%
	Requested meter (b)	33%
	Compulsory metering (c)	23%
	Net: Metered (d)	28%
	Net: Unmetered (e)	24%
Aware of Water Sure	Yes (a)	32%
	No (b)	26%
Aware of services for the elderly	Yes (a)	30%
	No (b)	25%
Contact with company	Yes (a)	23%
	No (b)	27%

Base: All who use sewerage services (Excluding DK): 5266

Figure 11: Satisfaction with the value for money of sewerage services by demographic/socio-economic category (% very dissatisfied)

Q8: How satisfied or dissatisfied are you with the value for money of the sewerage services in your area?

Total	All	5%
Disability or long-term health condition	Yes (self) (a)	8%
	Yes (other) (b)	6%
	Net: Yes (c)	7%
	No (d)	5%
Gender	Male (a)	7%
	Female (b)	4%
HH Composition	1 person household (a)	4%
	2 person household (b)	5%
	1 parent family (c)	5%
	2 parent family (d)	5%
	Other (e)	6%

Total	All	5%
Household on benefits	Yes (a)	7%
	No (b)	5%
Area	Urban (a)	4%
	Rural (b)	6%
	Suburban /Semi-rural (c)	6%
Contact with company	Yes (a)	8%
	No (b)	5%

Base: All who use sewerage services (Excluding DK): 5266

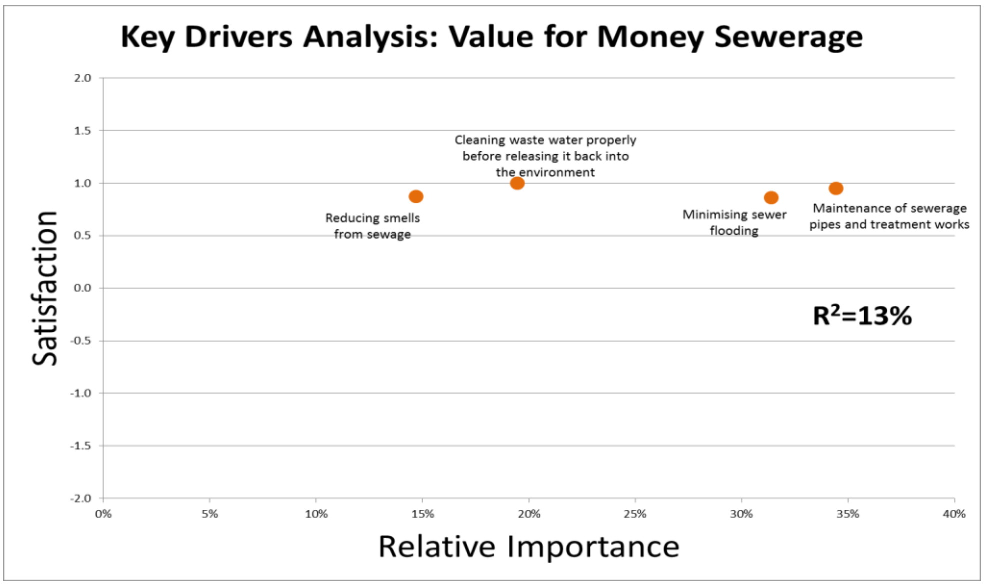
2.4 Key driver analysis of satisfaction with value for money of sewerage services

2.4.1 Key driver analysis was undertaken to determine which aspects of sewerage service most influence customers' perceptions of value for money.

2.4.2 The most important aspects are the maintenance of sewerage pipes and minimising sewer flooding. However, all of the aspects of sewerage service only explain 13% of the variance, which means that they are weak drivers and in the scheme of things do not strongly contribute to views on value for money of sewerage services.

2.4.3 As with value for money of water services, although this has not been tested, it is likely that price would be a strong driver in customers' perceptions of value for money for sewerage.

Figure 12: Key drivers of overall satisfaction with value for money of sewerage services



Satisfaction scores are calculated as an average of scores ranging from -2 to +2, where +2 is very satisfied, +1 is fairly satisfied, 0 is neither satisfied nor dissatisfied, -1 is fairly dissatisfied and -2 is very dissatisfied.

Definition of R^2:

- R^2 is an index ranging from 0 to 100%.
- It is the proportion of those satisfied with value for money of sewerage services that is explained by these aspects of sewerage supply.

- When R^2 is a small number e.g. less than 20% this means that the drivers (i.e. aspects of water service) do not explain a high proportion of the outcome – thus they are less useful in predicting and modelling the dependent variable.
- In market research, an R^2 between 40% and 60% means that the aspects tested are a good explanation for the findings.

2.5 Comparison of satisfaction with value for money from other service suppliers

2.5.1 Similar to 2012, customers are most likely to be satisfied with value for money provided by their communications providers (around 74%-78% in 2012; and around 78%-83% in 2013). The main reason for this is that customers regard these services to be cheaper/better value than water and sewerage services.

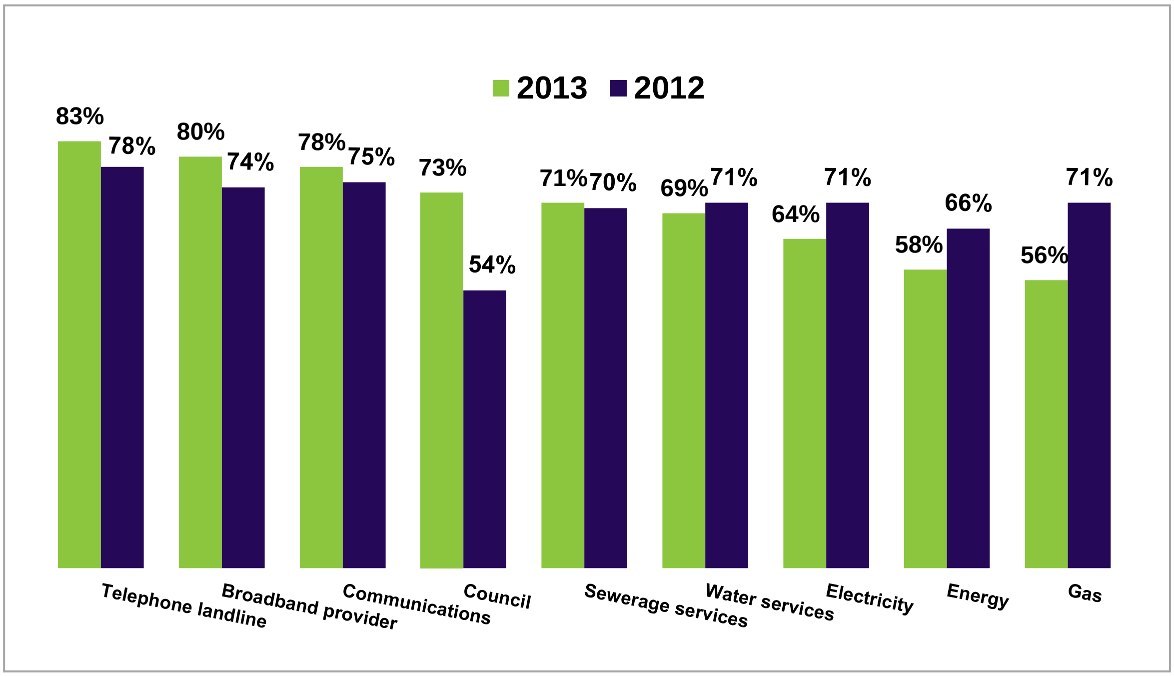
2.5.2 In 2012 customers were least likely to be satisfied with the value for money offered by their council tax (54%). In 2013 the question was rephrased to ask about the value for money of ‘council services’ rather than ‘council tax’ and this has led to a considerable increase in satisfaction (73%).

2.5.3 There is a notable fall in satisfaction with value for money of energy services (ranging from 56%-64% in 2013 to 66%-71% in 2012) with gas now the worst performing utility.

2.5.4 Satisfaction with value for money of water and sewerage services is in the middle of comparators with other utilities, with only energy utilities performing more poorly. However in 2013 the value for money of water and sewerage services is now higher than for energy and gas – in 2012 they were about the same.

2.5.5 It is worth noting that this survey was conducted at a time when there was much media coverage surrounding energy prices and their impact on cost of living.

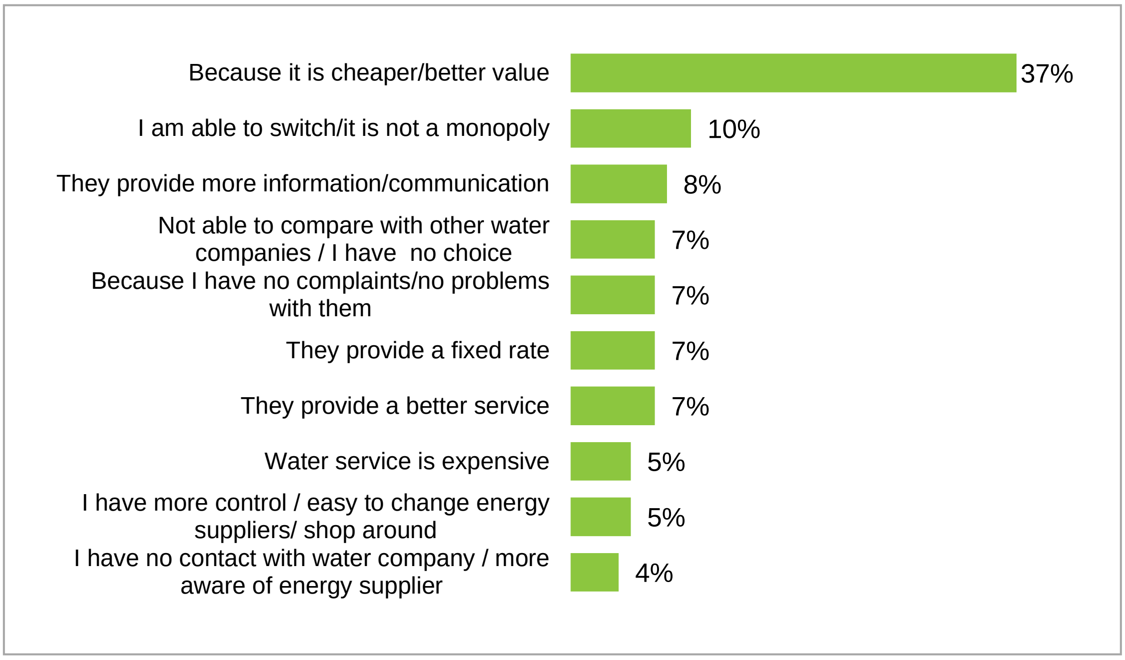
Figure 13: Satisfaction with value for money of other household service providers
Q11. Thinking about such other household utility services, how satisfied or dissatisfied are you with the value for money from services such as…?



Base: All who use services (Excluding DK)

2.5.6 Some 8% of customers think that their energy services are better value for money than their water and sewerage services, compared to 27% in 2012. In keeping with previous years, the main reason given by around a third (37%) of these customers is that energy costs are cheaper/better value.

Figure 14: Reasons for thinking energy is better value for money than water and/or sewerage services
Q12a. Why do you say that you are more satisfied with the value for money from your energy supplier than from your water and/or sewerage company?



Base: Those who are satisfied with the value for money from their energy supplier but not with their water and/or sewerage company (Excluding DK/Not stated) 435

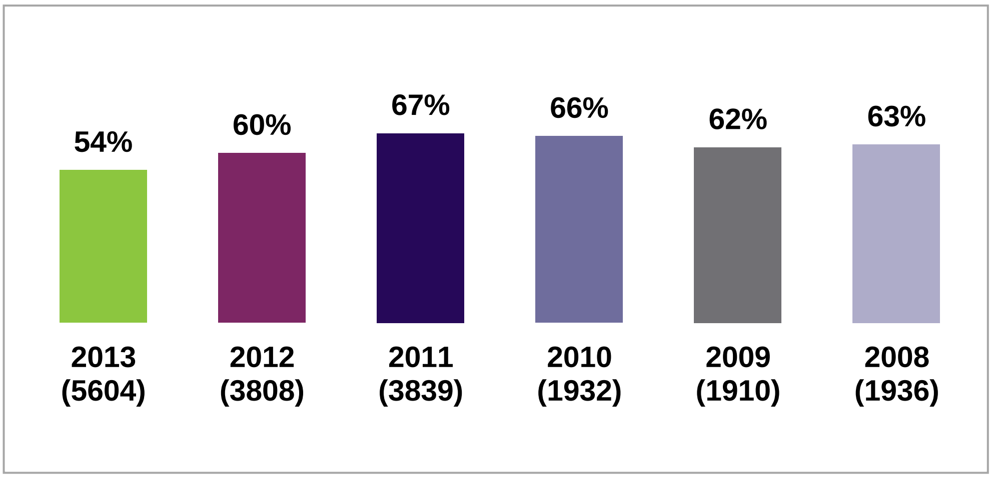
2.5.7 Better service was mentioned by only 7% of customers as a reason for considering that energy providers offer better value for money. This is a decline from 13% in 2012.

2.5.8 This year 13% were unable to say why their energy providers offer better value for money than their water and/or sewerage provider compared to 19% in 2012.

2.6 Fairness of water and sewerage charges

2.6.1 Just over half (54%) agree that their water and sewerage charges are fair, while 26% disagree. Perceptions of fairness have declined significantly since 2011, and 2013 sees the lowest score recorded in the survey.

Figure 15: Agree that water and sewerage charges are fair
Q13. How much do you agree or disagree that the <water / water and sewerage> charges that you pay are fair?

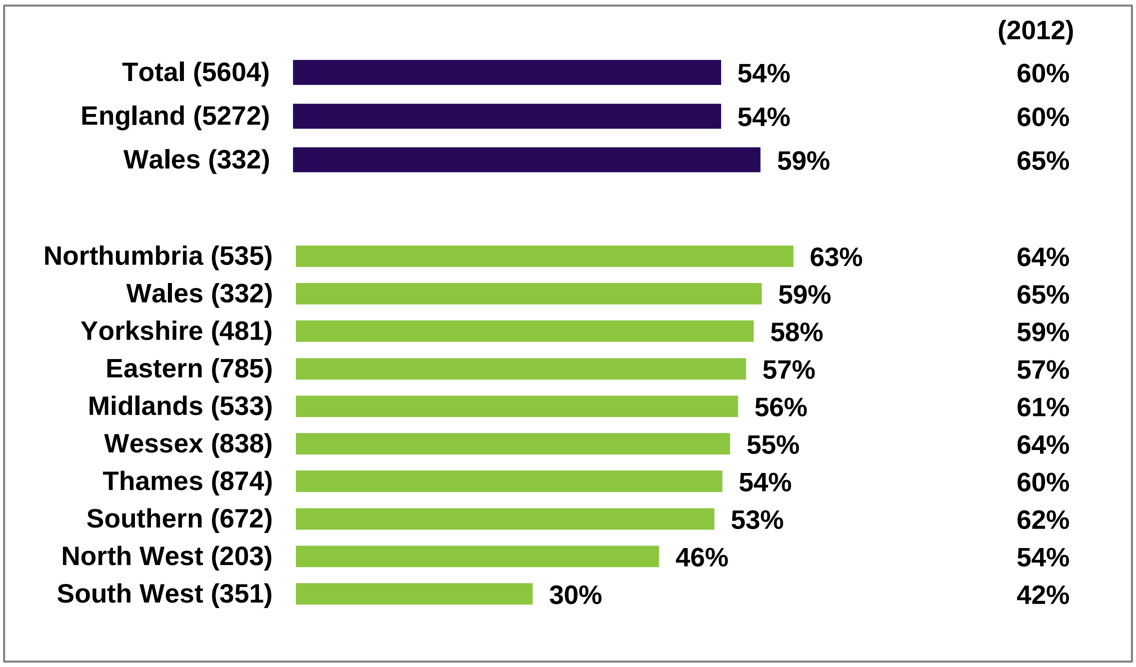


Base: All respondents (Excluding DK)

2.6.2 Although there has been a decline in the numbers of customers in England and Wales who think their charges are fair, customers in Wales (down to 59% from 65% in 2012) remain more likely to think their charges are fair than customers in England (down to 54% compared to 60% in 2012).

Figure 16: Agree that water and/or sewerage charges are fair by country and region

Q13. How much do you agree or disagree that the <water / water and sewerage> charges that you pay are fair?



Base: All respondents (Excluding DK)

2.6.3 The South West continues to be the region where customers are least likely to consider their water and sewerage charges to be fair. This is despite the introduction of a £50 Government contribution to bills in this region, in recognition of the historically higher charges there. In 2013, 69% of those in the South West region were aware of the £50 contribution.

2.6.4 In the Southern region there has also been a substantial drop in perceptions of fairness which could be linked to the compulsory metering programme: only 45% of those compulsorily metered agreed charges were fair, compared to 58% of all who are metered. A quarter of customers in Southern region (25%) report having a meter compulsorily fitted, which is more than double the average (10%) for all customers.

2.6.5 The following groups of customers are significantly more likely to agree that their charges are fair:

- One person households (59%) compared to two-person (53%), families (49%), and other larger households (53%)
- Metered customers (58%) compared to unmetered (50%)

- Meter optants (61%) compared to those who had no choice in this and were compulsorily metered (52%), and those who moved to a property with a meter (56%)
- Customers aged 75+ (63%)

2.7 Affordability of water and sewerage charges

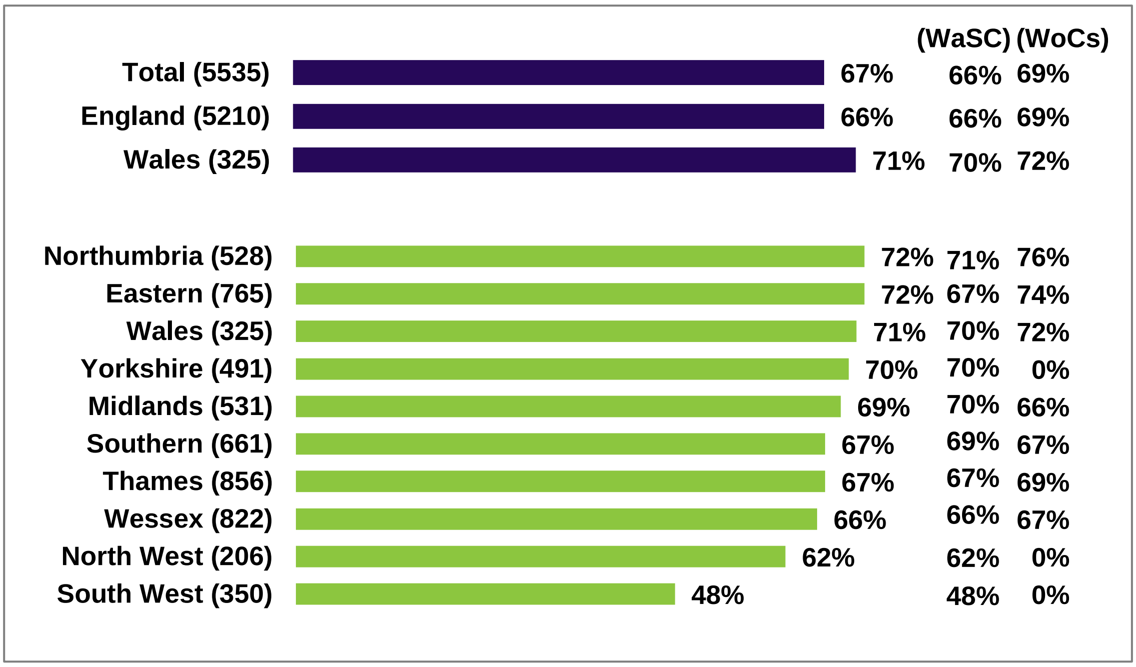
2.7.1 For the first time this year, affordability was calculated for all customers as well as separately for WaSC and WoC customers, as shown in Figure 17. Overall, 67% of all customers say the water and sewerage charges they pay are affordable. This year 20% say charges are unaffordable.

2.7.2 Customers in Wales (71%) are more likely to agree that their charges are affordable than in England (66%). And in Wales 18% of customers say that their charges are unaffordable.

2.7.3 Overall, perceptions of affordability are very low for the South West, with only around half of customers (48%) giving a positive rating and 41% giving a negative rating.

2.7.4 Across the other regions, those who agree that their water / water and sewerage charges are affordable vary between 61% and 72%.

Figure 17: Affordability of water and sewerage charges by country, WaSC region and by aggregate WaSCs and WoCs
Q15a/d. How much do you agree or disagree that the <water/ water and sewerage> charges that you pay for are affordable to you?



Base: All respondents (Excluding DK)

2.7.1 As shown in Figure 17, customers of WoCs are more likely to find their charges affordable than WaSC customers, although it isn't clear what is driving this difference in perceptions.

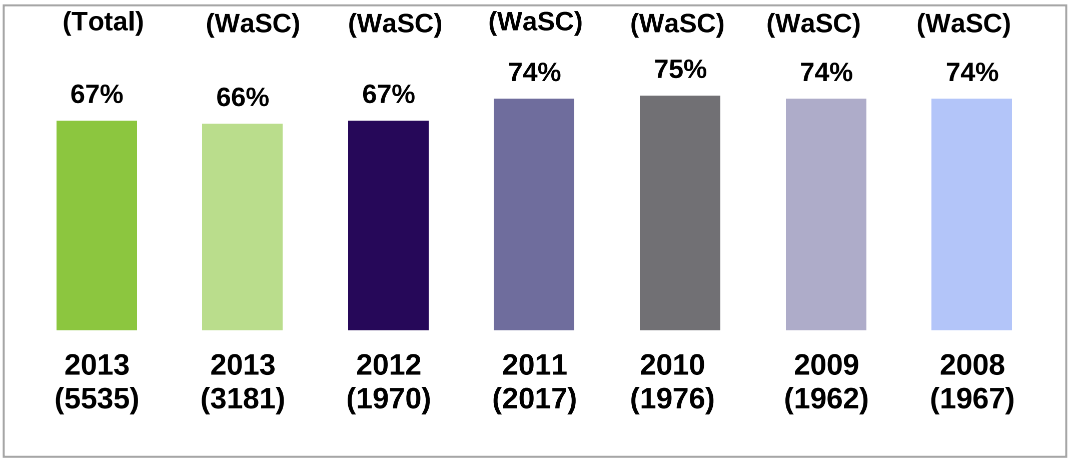
2.7.2 Compared to 2012 there has been a sharp increase in the proportion of customers disagreeing that their charges are affordable: amongst WaSC customers this has increased significantly to 21% from 13% and amongst WoC customers this has increased to 18% from 11%.

2.7.3 At an overall level, the following customer groups are significantly more likely to agree their bill is affordable:

- Metered customers (72%, compared to 62% of unmetered)
- Households without a household member with a disability/long term illness (70%, compared to 57% of households with)
- Higher social groups (72% of ABs compared to 65% C1C2 and 64% DE)
- Customers from households where there is no-one on benefits (70% compared to 57% for those receiving benefits)
- Owner occupiers (69% compared to 61% of renters)
- One or two person households (70% compared to 57% of one parent families)
- Customers from a white background (68% compared to 53% from a black or minority background)
- Customers aged 75+ (72%)
- Customers who have not contacted their company (69%) compared to those that have (59%).

2.7.4 Looking specifically at WaSC customers, 66% regard the prices they pay for water/sewerage as affordable compared to 67% in 2012. There has been a steady decline from the 75% of customers in 2010 who considered that the charges were affordable. This dip might be reflective of financial constraints faced by households in the current economic climate, against a background of rises in water prices in recent years.

Figure 18: Affordability of water and sewerage charges for aggregate WaSCs
Q15a. How much do you agree or disagree that the <water/ water and sewerage> charges that you pay for are affordable to you?



Base: All who have the same water and sewerage company (Excluding DK)

2.7.5 WaSC customers in Wales (70%) are more likely to agree that the charges are affordable than customers in England (66%).

2.7.6 In 2012, WaSC customers in the Wessex region were the most likely to agree that their water and sewerage charges were affordable (78%) this region has dropped to seventh place in 2013 (66%), with Northumbria taking the top spot at 71%. WaSC customers in the South West report a decrease in affordability this year down to 48% from 56% in 2012. This large decline is despite the introduction of the £50 Government contribution for customers in this region.

2.7.7 The decline in perceptions of affordability is also seen among WoC customers. In 2013, 70% are satisfied with the affordability of their water services and 69% are satisfied with the affordability of their sewerage services. This is significantly lower than the levels reported in 2011 (Figure 19).

Figure 19: Affordability of water and sewerage charges for aggregate WoCs
Q15b/c/d. How much do you agree or disagree that the <water/ water and sewerage> charges that you pay for are affordable to you?

	2013	2012	2011
WoCs water and sewerage	69%	N/A	N/A
WoCs water	70%	71%	78%
WoCs sewerage	69%	70%	78%

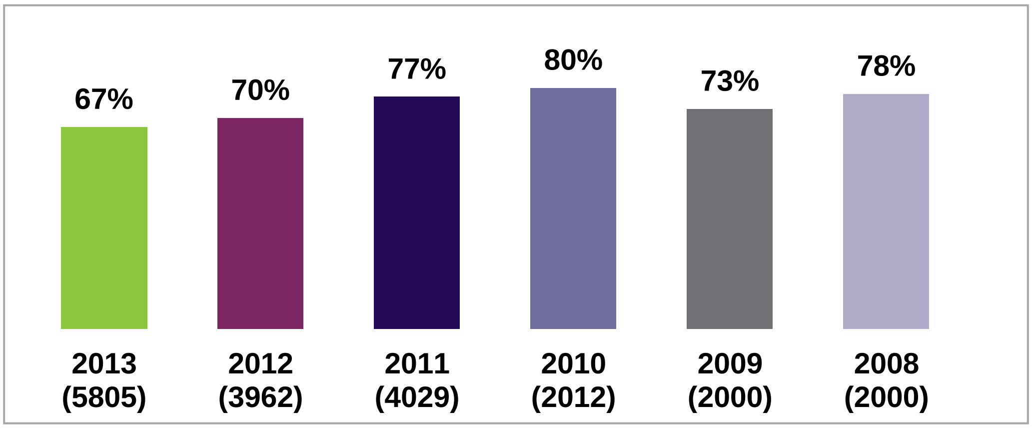
Base: All WoC customers (Excluding DK)

2.7.8 Among WoC customers, those in the Eastern and Northumbria regions are the most likely to say their water and sewerage charges are affordable.

2.7.9 The proportion of customers who say they would contact their water/ sewerage company if worried about their bill continues to decline and 2013 sees the lowest reported likelihood to contact since the survey began in 2008. Less than a third (30%) said they were unlikely to contact their company.

Figure 20: Proportion likely to contact their water and/or sewerage company if worried about bill

Q17. How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill?



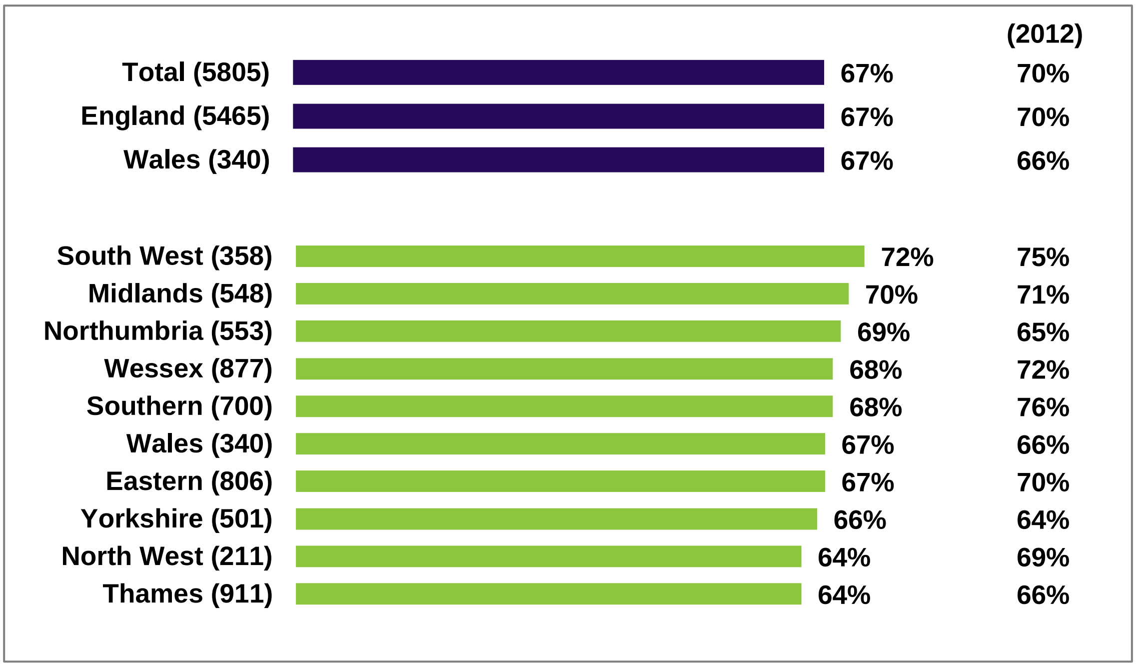
Base: All respondents

2.7.10 There are no differences in the likelihood of customers in England or Wales contacting their company if worried about paying their bill.

2.7.11 The South West has the highest proportion of customers indicating they are likely to contact their water/sewerage provider if they are worried about paying bills.

Figure 21: Likelihood of contacting their water and/or sewerage company if worried about bill by country and region

Q17. How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill?



Base: All respondents

2.7.12 Those least likely to make contact with their water and/or sewerage companies if worried about their bills are:

- Older people (40% of those over 75 years)
- Those in one person households (34%)
- Those dissatisfied with the value for money of sewerage (34%)

2.7.1 Of those that disagree that the charges they pay for water and sewerage are affordable, 66% said they were likely (43% very likely and 23% fairly likely) and 33% said they were unlikely to contact their water/sewerage company if worried about their bill. This is a small rise amongst this group from 63% last year (47% very likely and 16% fairly likely).

2.7.2 The profile of customers who are unlikely to contact the water/sewerage company is different depending on whether they agree that their water and sewerage charges are affordable or not. Those who said that these charges were unaffordable and were unlikely to contact the water/sewerage company are:

- More likely to have a long term illness, health problem or disability (23%) compared to those also unlikely to complain but who say that charges are affordable (15%)
- More likely to be on benefits (30%) compared to 17% from the other group
- More likely to be in a 2 parent family (16%) compared to 9% from the other group
- Less likely to be in socio-economic grades AB (23%) compared to 30% for the other group
- More likely to be unmetered (59%) compared to 47% for the other group
- Less satisfied with their water supply (89% compared to 96%) and their sewerage services (74% compared to 84%)
- Less satisfied with value for money of their water supply (36% compared to 78%) and their sewerage services (43% compared to 73%)

3. Consumer rights and responsibilities

Water consumers have various rights relating to charging options and compensation for poor service. They also have responsibilities such as preventing pipes freezing. This chapter presents customers' awareness of and views on these issues.

SUMMARY

Key trends

- Awareness of water companies' services for elderly and disabled customers has increased strongly each year from 20% in 2011 to 31% in 2013. However, uptake remains low at 1-2%.
- Awareness amongst all customers that water meters can be fitted free of charge on request has increased year on year from 57% in 2011 to 68% in 2013. Amongst the unmetered customers awareness is at 62% compared with 75% of those who are metered.
- Similar to previous years, billing enquiries were the main driver for contact with 23% in 2013 and 27% in 2012.
- Almost eight in ten (78%) customers are satisfied with the last contact they had with their water/ sewage company which has been improving year on year after the dip seen in 2011 (69%).
- Only one in five customers have received information about avoiding freezing pipes. This is similar to 2012 (19%).

Key changes since 2012

- Awareness of the WaterSure tariff has fallen back to 9% from 12% the year before.
- Half of customers indicate that they have water meters (49%). This is an increase from 2012 (46%) and 2011 (36%).
- Three regions in particular have shown marked increases of around ten percentage points in the proportion of customers with water meters since last year: Southern region up from 52% to 63%; Yorkshire are up from 44% to 54%; and the North West region have increased from 36% to 45% in 2013.
- Fewer unmetered customers are aware that they can switch to a water meter on a trial basis: 28% are aware in 2013 compared to 34% in 2012.
- Just less than one in five customers (18%) made contact with their water and/ or sewerage company in the 12 months prior to the survey. This is a significant increase from those claiming contact in 2012 (12%) and 2011 (10%).
- The proportion of customers who have taken measures to avoid having frozen pipes has gone down to 46% from 55% in 2012.

New questions/analysis

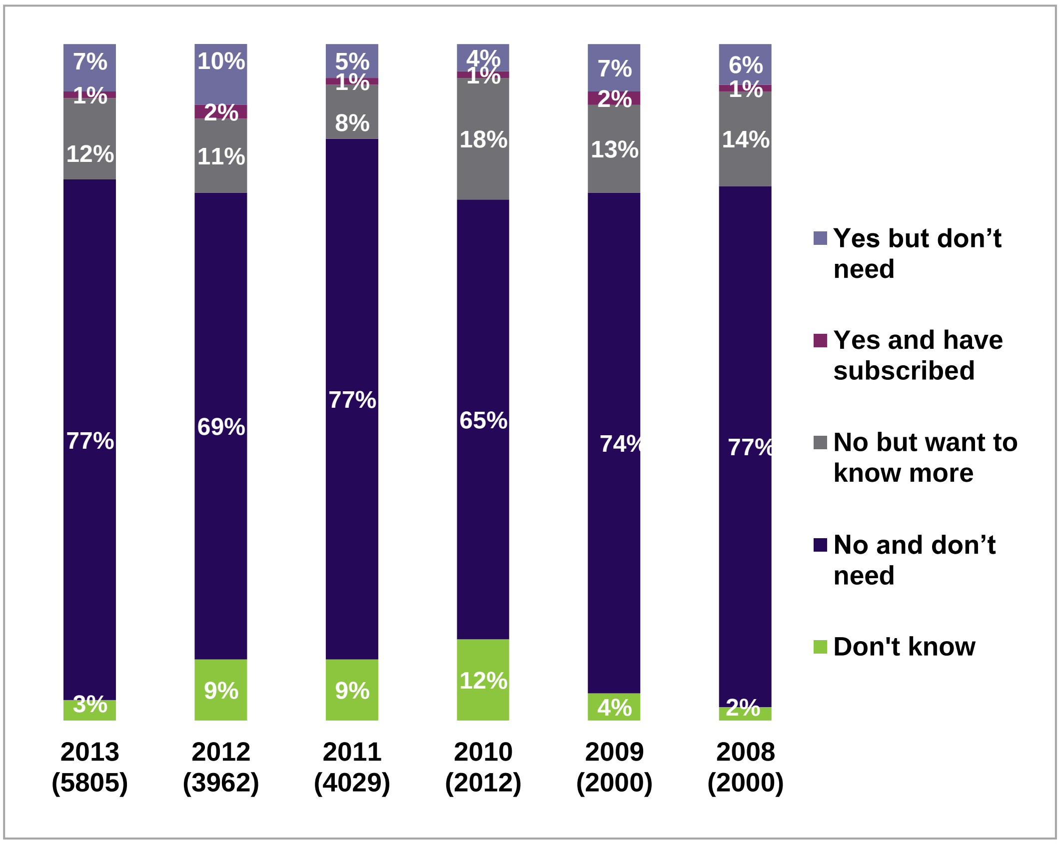
- Key driver analysis shows that aspects of contact handling are very strong drivers of satisfaction with contact with water and/or sewerage companies. Ease of contact and being kept informed of progress with your enquiry/complaint/claim are the most important factors driving satisfaction.
- Awareness of schemes such as Anglian's Assistance Fund and Severn Trent's Big Difference, which help water customers who may be struggling with their bills, is low at 3%.

3.1 WaterSure/Welsh Water Assist Tariff

3.1.1 Awareness of the WaterSure tariff stands at 9% compared to12% last year.

3.1.2 One in eight customers (12%) would like to know more about the WaterSure tariff compared to 11% in 2012.

Figure 22: Awareness of WaterSure/Welsh Water Assist tariff
Q21a Are you aware of or are you currently on the Welsh Water Assist/ WaterSure tariff. This was introduced to help people in low income groups who need to use a lot of water.

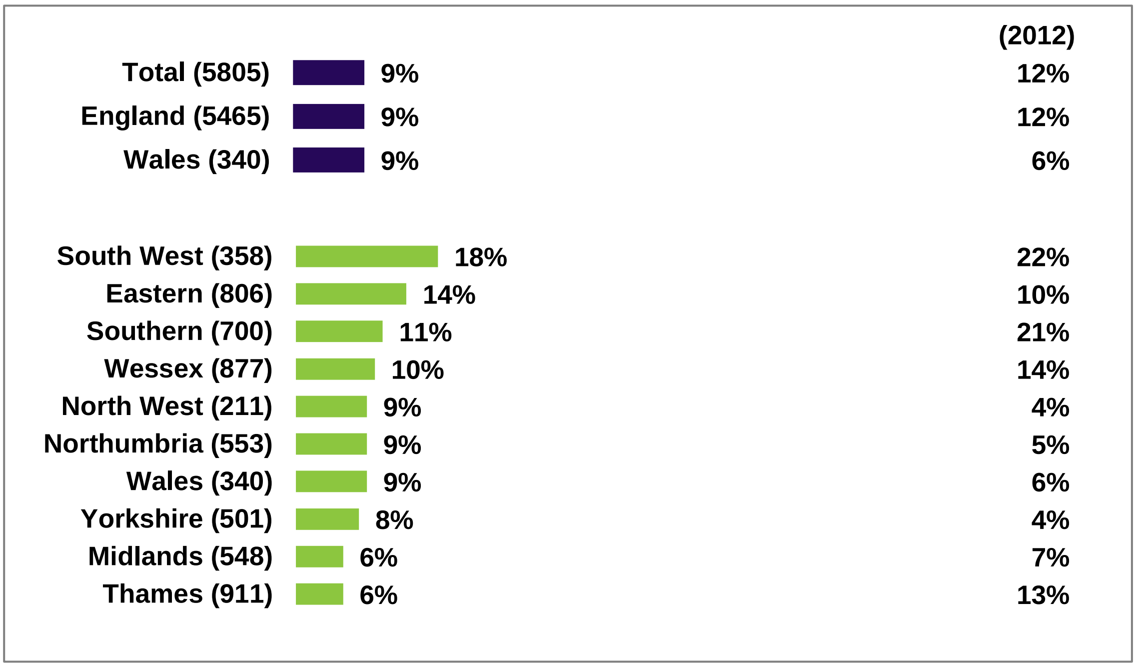


Base: All respondents

3.1.3 Awareness is highest in the South West at 18%, which is a small drop from the 22% in 2012. In England, WaterSure is only available to customers with water meters – so we would expect awareness to be higher in regions with higher levels of metering and to be lower in regions with more unmetered properties/customers in this sample. The 3 regions with the highest awareness are those with the highest proportions of water meters in this sample.

Figure 23: Awareness of WaterSure/Welsh Water Assist tariff by country and region

Q21a Are you aware of or are you currently on the Welsh Water Assist/ WaterSure tariff. This was introduced to help people in low income groups who need to use a lot of water.



Base: All respondents

3.1.4 Awareness across the sample of any other schemes to help customers in genuine financial hardship such as Anglian's Assistance Fund and Severn Trent's Big Difference, which help water customers who may be struggling with their bills, is low at 3%. However some of these are quite new, and they are targeted to a very small part of the customer base.

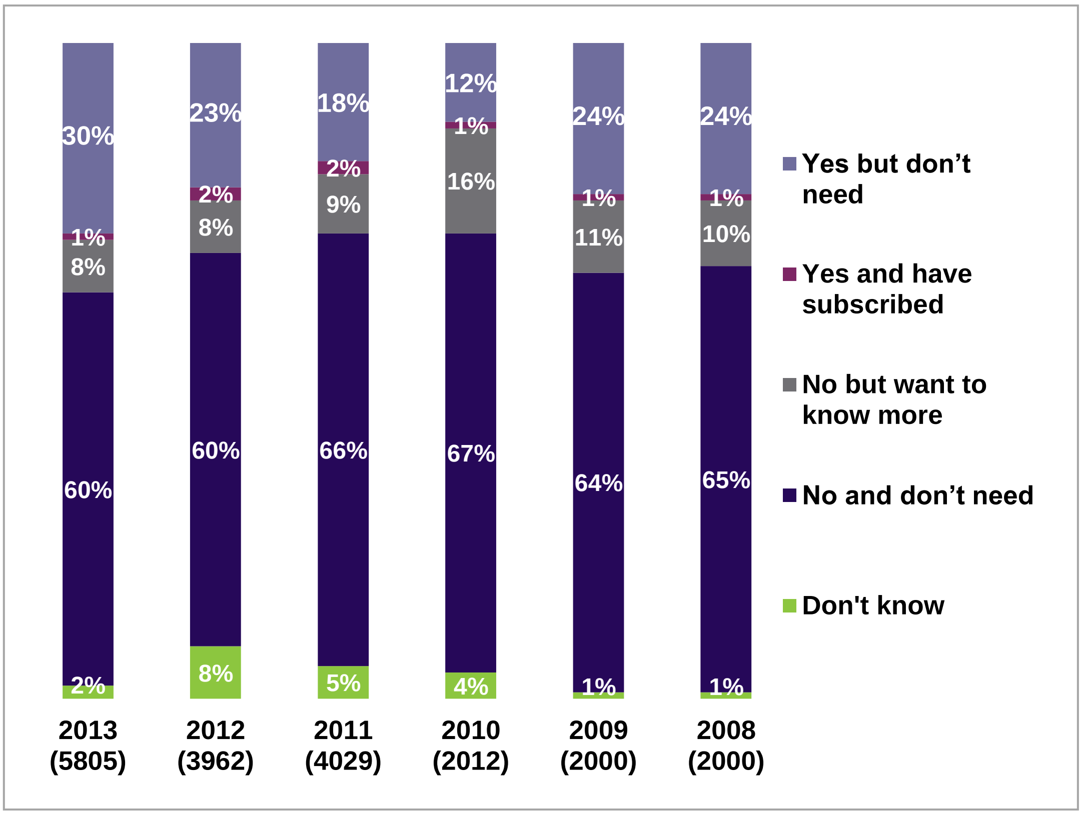
3.2 Services for elderly and/or disabled customers

3.2.1 Awareness of water companies' services for the elderly and disabled has been rising strongly over the past three years. In 2011, 20% were aware, the following year it was 25% and this year it is 31% who are aware. However, uptake remains static at 1-2%.

3.2.2 Similar to the last two years, 8% would like to know more about these services.

Figure 24: Awareness of water company's services for elderly and/or disabled customers

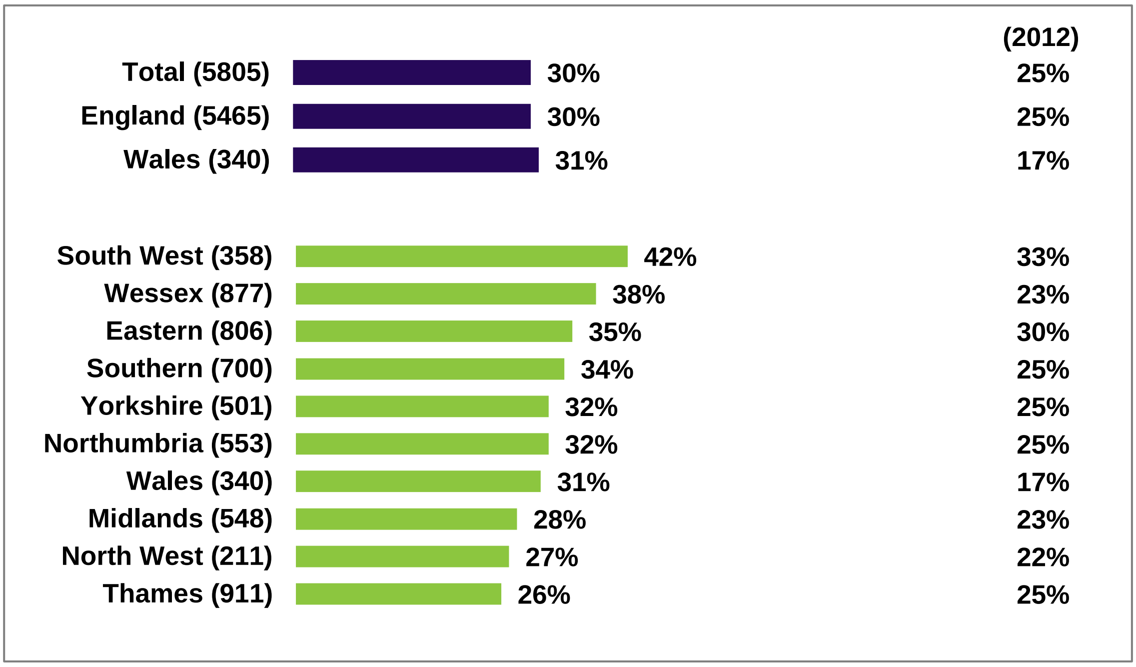
Q25a Are you aware of your water company's services for the elderly and/or disabled?



Base: All respondents

3.2.3 Customers in the South West (42%), Wessex (38%), and the Eastern regions (35%) are most aware of the services.

Figure 25: Awareness of water company's services for elderly and/or disabled customers by country and region
Q25a Are you aware of your water company's services for the elderly and/or disabled?

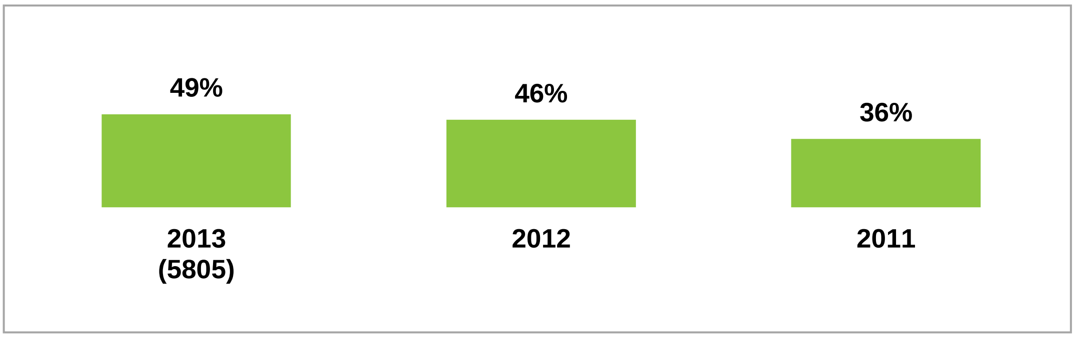


Base: All respondents

3.3 Incidence of water meters

3.3.1 Half of customers indicate that they have water meters (49%). This is an increase from 2012 (46%) and 2011 (36%).

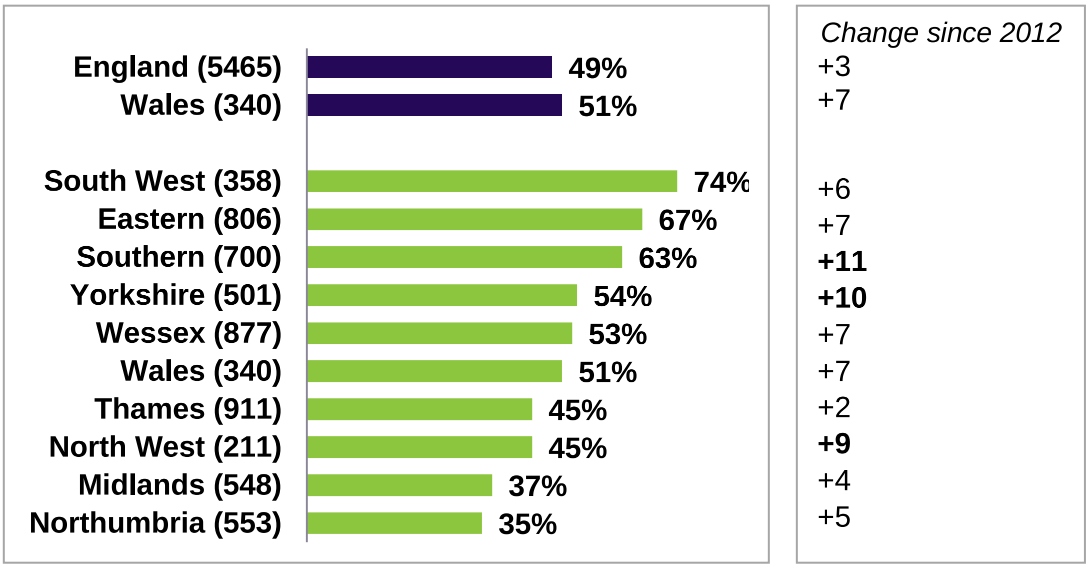
Figure 26: Proportions having water meters
Q18a. Does your household have a water meter?



Base: All respondents

3.3.2 As with previous years, there are wide variations by region. South West, Eastern and Southern regions continue to have the highest proportion of households with water meters and Northumbria the lowest. Three regions in particular have shown marked increases of around ten percentage points in the proportion of customers with water meters: Southern region (63% in 2013; and 52% in 2012), Yorkshire (54% in 2013; and 44% in 2012), and the North West region (45% in 2013; and 36% in 2012). In the case of Southern region this may be driven by compulsory metering, whereas in Yorkshire and the North West region this appears to be driven by higher proportions of optants.

Figure 27: Proportions having water meters by region
Q18a. Does your household have a water meter?



Base: All respondent
Figures in bold denote significant change since the last year

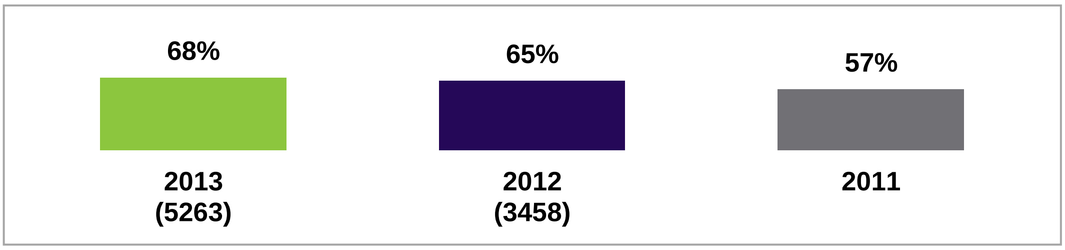
3.3.3 Those aged 61+ years (59%) and one-person households (60%) are significantly more likely to have water meters.

3.3.4 In 2013, 42% of those with a water meter said it was already installed on their property when they moved in (this is down from 49% in 2012); 46% had asked for a meter (this is an increase from 41% in 2012; but less than the 49% reported in 2011); and 10% had to have a meter fitted.

3.4 Requesting a meter

3.4.1 Awareness amongst all customers that water meters can be fitted free of charge on request has risen to 68% from 65% in 2012.

Figure 28: Awareness that water meters can be fitted free of charge
Q19. Were you aware that a) when requested, water meters are fitted free of charge b) if you ask for a water meter to be fitted, you have 12 months to decide whether or not you like it. If you decide you don't like it, you can go back to a water rate charge for your property

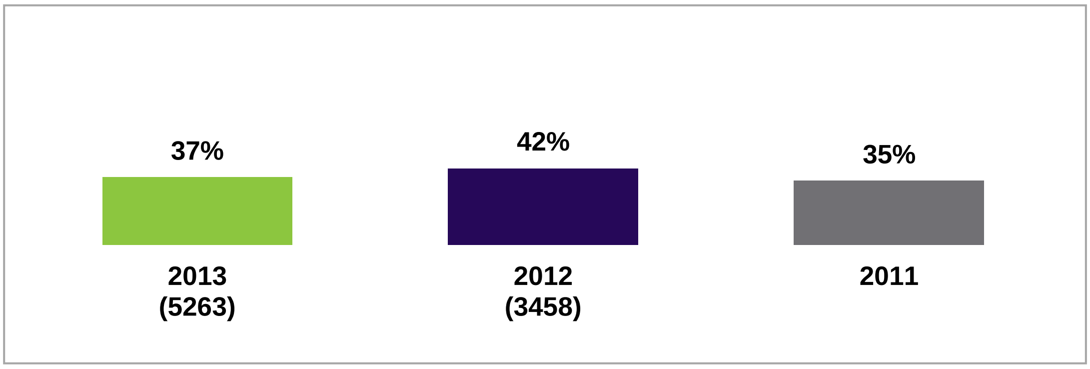


Base: All respondents - except Affinity SE, Southern and South East Water customers

3.4.2 Amongst unmetered customers there has been a similar rise in awareness from 60% in 2012 to 62% in 2013.

3.4.3 However, fewer customers are aware that they can switch to a water meter on a trial basis this year (37%) than in 2012 (42%). For unmetered customers, those that know they can switch on a trial basis has seen a similar drop from 34% in 2012 to 28% in 2013.

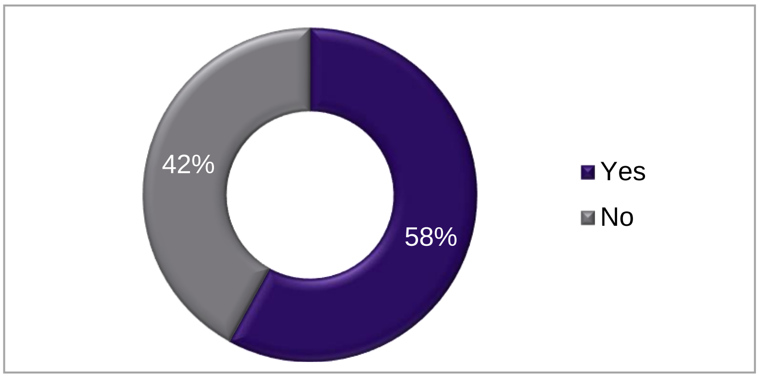
Figure 29: Awareness of the possibility that you can trial a water meter for 12 months
Q19b If you ask for a meter to be fitted, you have 12 months to decide whether or not you like it. If you decide you don't like it, you can go back to a water rate charge for your property.



Base: All respondents except Affinity SE and Southern Water and South East Water customers

3.4.4 Awareness of meters being fitted free of charge and the option to trial the meter is highest in the South West region (80% and 54% respectively).

Figure 30: Interest in free meter if it could reduce bills
Q20a. If you found you could reduce your bill by having a meter fitted, would you apply for a free meter under this 12 month trial scheme?

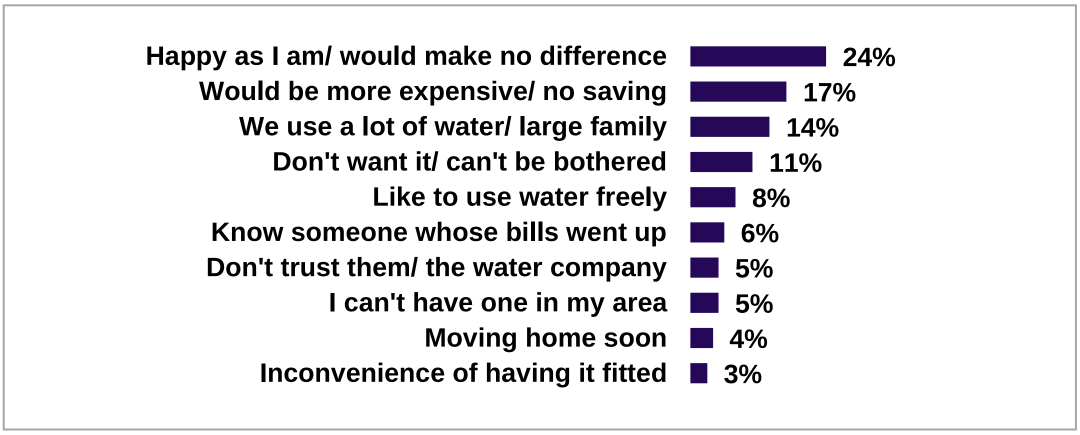


Base: All respondents without a water meter except Affinity SE, Southern and South East Water customers: 2600

3.4.5 Around six in ten (58%) of those without water meters would apply for one under the 12 month trial scheme if they found it would save them money. Interest is highest among the following groups: those aged 18-34 years (74%), two-parent families (66%), social classes AB (63%), and customers in the South West (62%) and Southern (62%) regions.

3.4.6 Figure 31 shows that resistance to having a meter is mainly borne out of inertia and/or fears that it would work out more expensive.

Figure 31: Meter detractors – reasons for not wanting to get a meter
Q20b. Why would you not apply for a free meter under this 12 month trial scheme?



Base: All respondents who would not apply for the 12 month trial scheme: 1082

3.5 Water meter users' attitudes and behaviour

3.5.1 As Figure 32 illustrates, metered customers are generally more satisfied on a range of measures (such as value for money and the fairness and affordability of charges) than unmetered customers. This pattern has also been observed in previous years.

3.5.2 Those who have requested a meter tend to have the highest satisfaction scores, followed by those who moved to a house with a meter, and then those that have been metered compulsorily.

Figure 32: Comparison between metered and unmetered customers

	All	Moved in to house with meter	Requested meter	Compulsory metered	Metered	Unmetered
Satisfied with value for money of water services	69% (5687)	70% (1245)	77% (1381)	66% (306)	73% (2988)	66% (2699)
Agree charges are fair	54% (5604)	56% (1226)	61% (1360)	52% (298)	58% (2936)	50% (2668)
Agree charges are affordable	67% (5535)	69% (1202)	75% (1358)	68% (287)	72% (2900)	62% (2635)
Made conscious decision to use less water	66% (5746)	70% (1266)	77% (1401)	72% (309)	73% (3031)	59% (2715)

Base: In brackets next to each result.

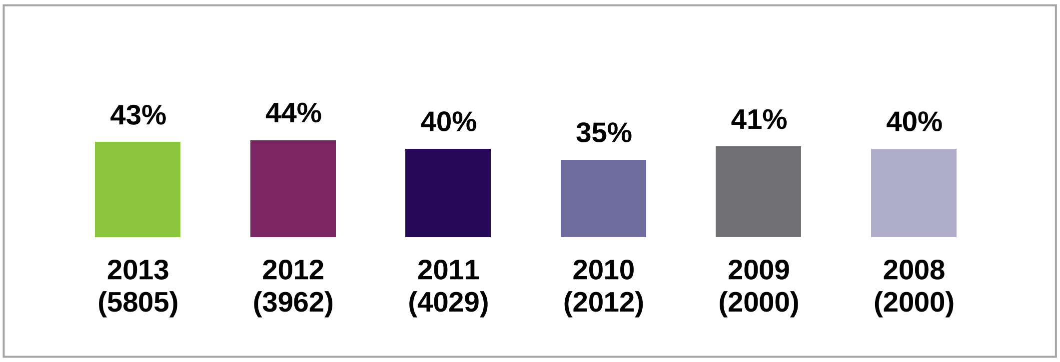
3.5.1 Metered customers are also more likely to have made a conscious decision to use less water.

3.6 Service standards and compensation

3.6.1 The Guaranteed Service Standard (GSS) scheme entitles individuals to compensation if their water/sewerage provider fails to meet minimum service standards for reasons within their control. Customers' awareness of this scheme remains virtually unchanged from last year at 43% compared to 44% in 2012.

Figure 33: Aware of potential compensation for failure to meet customer service standards

Q26. Were you aware that if your water/ sewerage company fails to meet certain customer service standards for reasons within their control, you may be entitled to compensation?

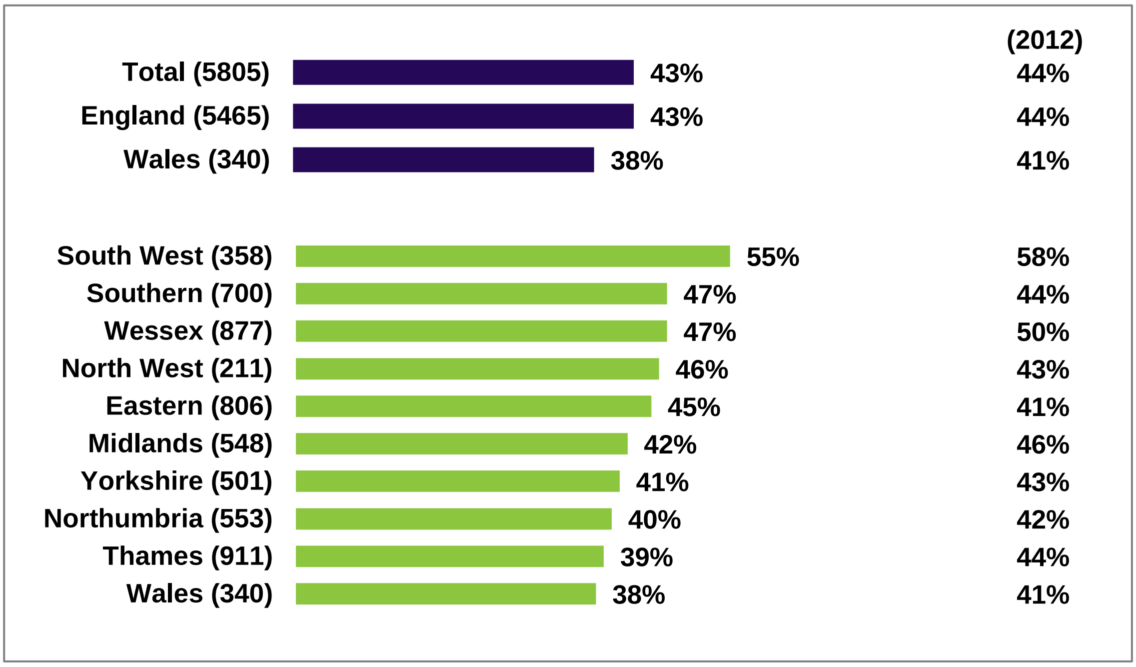


Base: All respondents

3.6.2 Awareness is highest in the South West region (55%) and lowest in Wales (38%).

Figure 34: Aware of potential compensation for failure to meet customer service standards by country and region

Q26. Were you aware that if your water/ sewerage company fails to meet certain customer service standards for reasons within their control, you may be entitled to compensation?



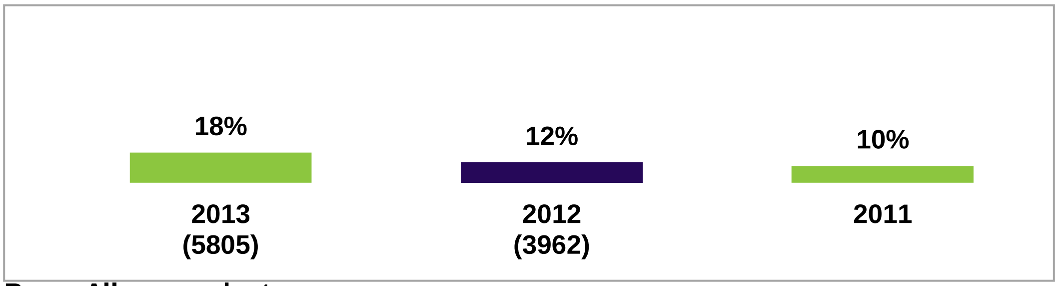
Base: All respondents

3.6.3 Customers with a meter (45%) are more likely than those who are unmetered (41%), to be aware of the scheme. Among those with meters awareness is highest for those who proactively requested a meter.

3.7 Contacting water and/or sewerage companies

3.7.1 Almost one in five customers (18%) made contact with their water and/ or sewerage company in the last 12 months. This is a significant increase from those claiming contact last year (12%).

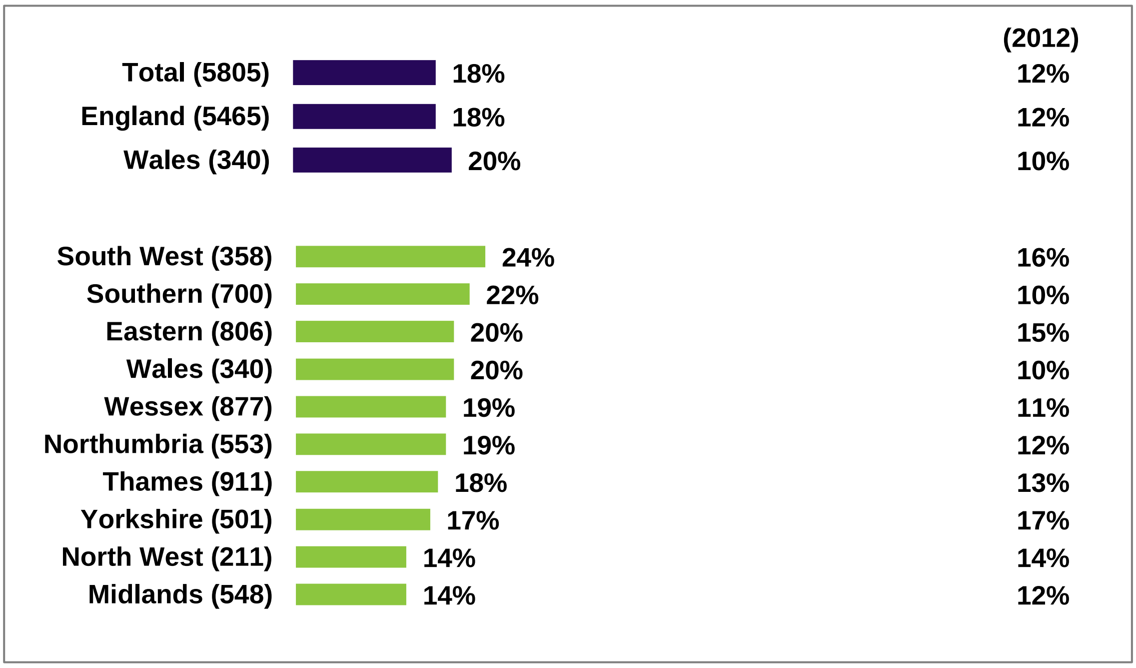
Figure 35: Contact with water and/or sewerage company
Q28. Have you contacted your water/ sewerage company in the past 12 months?



Base: All respondents

3.7.2 Those in the South West and Southern regions are most likely to have made contact.

Figure 36: Contact with water and/or sewerage company by country and region
Q28. Have you contacted your water/ sewerage company in the past 12 months?



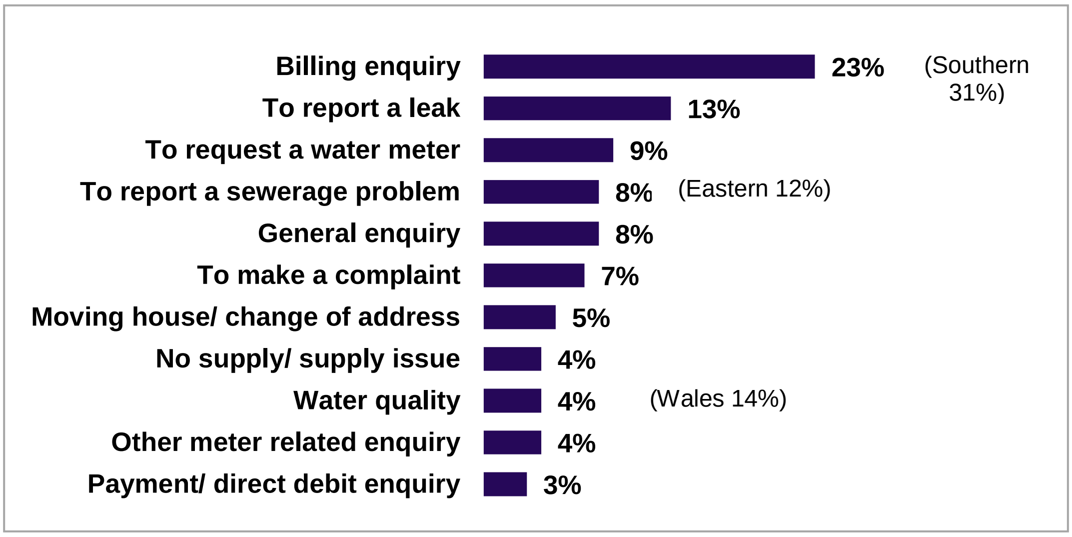
Base: All respondents

3.7.3 Those most likely to have contacted the water/sewerage company are:

- Metered (21%) compared to unmetered customers (14%)
- Younger customers (25% of those aged 18-44 compared to 18% of those 45-74, and 10% of those aged 75 and over)
- Those in the higher socio-economic grades (19% of ABs, 18% of C1C2s, and 16% of DEs)
- Families (27% of those in single parent families, and 20% in two parent families)
- Renters (21%) compared to owner occupiers (17%)
- Those receiving benefits (21%) compared to those not receiving benefits (17%).

3.7.4 The main reason for contact was billing enquiries (23%), similar to last year (27%).

Figure 37: Reasons for contacting company
Q29. What was your most recent contact about?

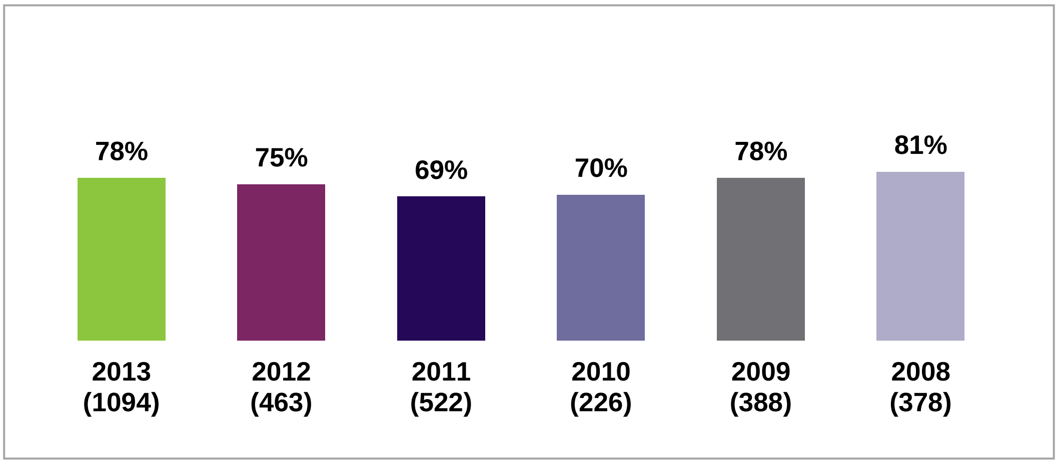


Base: All making contact with their water/ sewerage company in the past 12 months: 1094

3.7.5 There is some evidence of a link between the regions with the highest proportion of meters, and the highest levels of contact over billing enquiries. South West region has the highest level of metering (74%) and the second highest level of billing enquiries (29%) and Southern has the third highest level of metering and the highest level of billing enquiries (31%).

3.7.6 The proportion satisfied with contact is now 78% and has been improving year on year after the dip seen in 2010 and 2011.

Figure 38: Satisfaction with contact with water and/or sewerage company
Q31. Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water/ sewerage company?

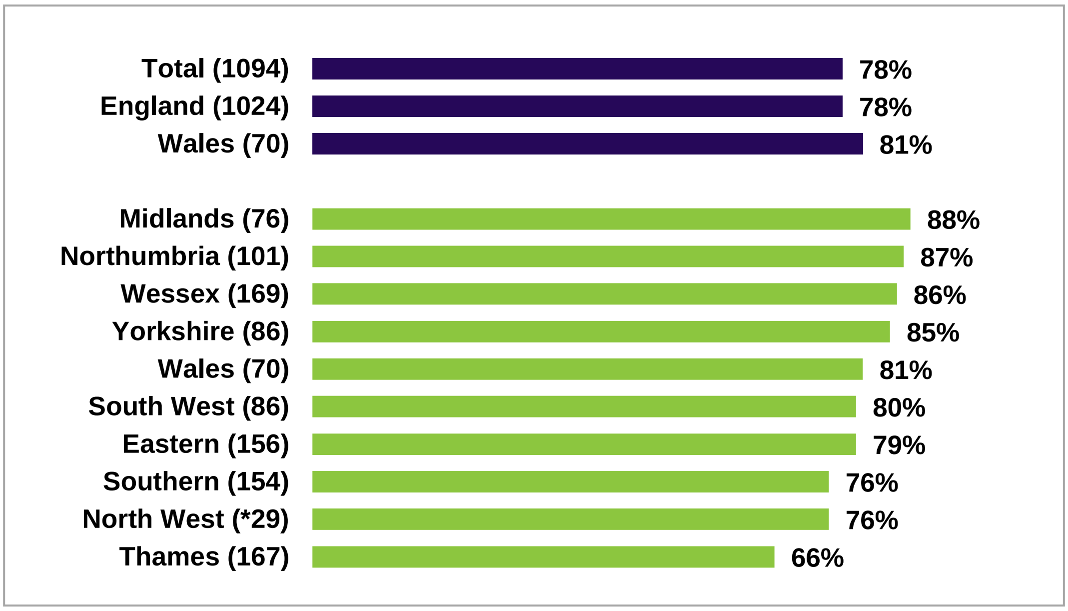


Base: All making contact with their water/ sewerage company in the past 12 months

3.7.7 Satisfaction with contact by region is generally high, with four of the ten regions reporting a satisfaction level of 85% or above.

Figure 39: Satisfaction with contact with water and/or sewerage company by country and region

Q31. Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water/ sewerage company?



Base: All making contact with their water/ sewerage company in the past 12 months
***Denotes very small base**

3.7.8 Figure 40 presents the levels of satisfaction with various aspects of call handling by region where green is the highest satisfaction and red is relatively lower. All aspects rank similarly to customers' overall satisfaction with contact with their water and/or sewerage company.

Figure 40: Satisfaction with aspects of contact with water and/or sewerage company

Q31. Taking everything into account, overall how satisfied or dissatisfied were you with the contact with your water/ sewerage company?

	% who have contacted in past 12 months	% satisfied with ease of contacting someone	% satisfied with quality and clarity of information provided	% satisfied with knowledge and professionalism	% satisfied with feeling that your contact had been or would be resolved	% satisfied with being kept informed of progress	% satisfied overall with the contact
Midlands (76)	14	91	92	96	84	71	88
Northumbria (101)	19	84	83	82	83	66	87
Wessex (168)	19	89	83	90	80	72	86
Yorkshire (86)	17	85	81	83	78	65	85
Wales (70)	20	84	80	89	80	76	81
South West (86)	24	84	81	81	76	66	80
Eastern (155)	20	79	80	83	79	63	79
Southern (153)	22	80	79	77	72	58	76
North West (*29)	14	66	83	72	79	66	76
Thames (164)	18	72	70	69	69	53	66

Best region   Worst region

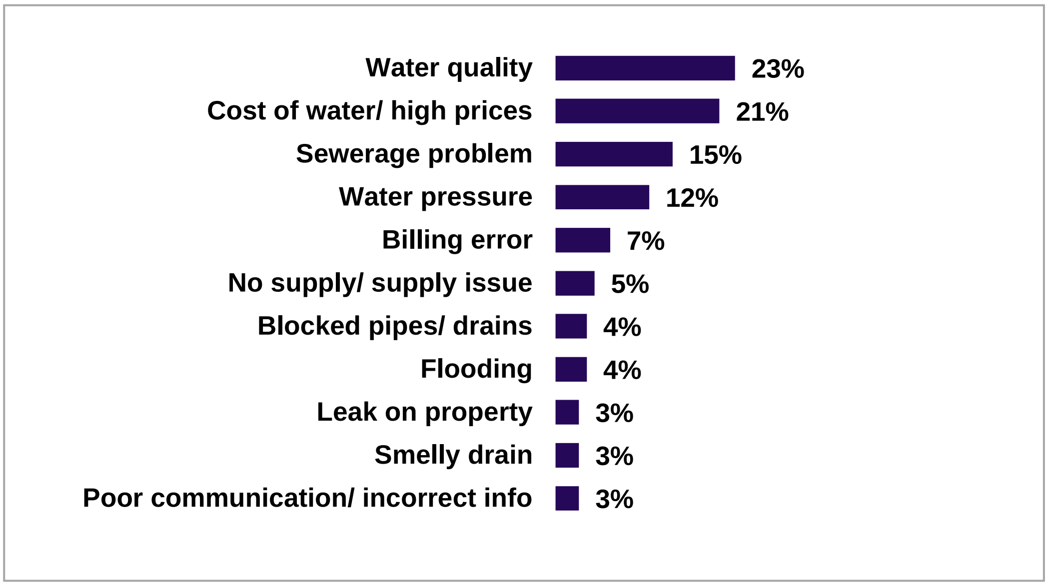
Base: Those that contacted their water and/or sewerage company. The base size is indicative as the actual number for each cell will vary depending on those who say don't know to each question.

3.7.9 In the past 12 months, of those that contacted their water/sewerage company, only 7% did so to complain. This represents just over 1% of the total customers interviewed. Another 4% of customers felt they had reason to complain about their water and/or sewerage services but didn't.

3.7.10 Taking both those who did contact the company to complain and those that didn't but had reason to complain the total is 6% (due to rounding).

3.7.11 Those having reason to, but not actually complaining are mainly dissatisfied with water quality, perceived high prices and sewerage problems (Figure 41).

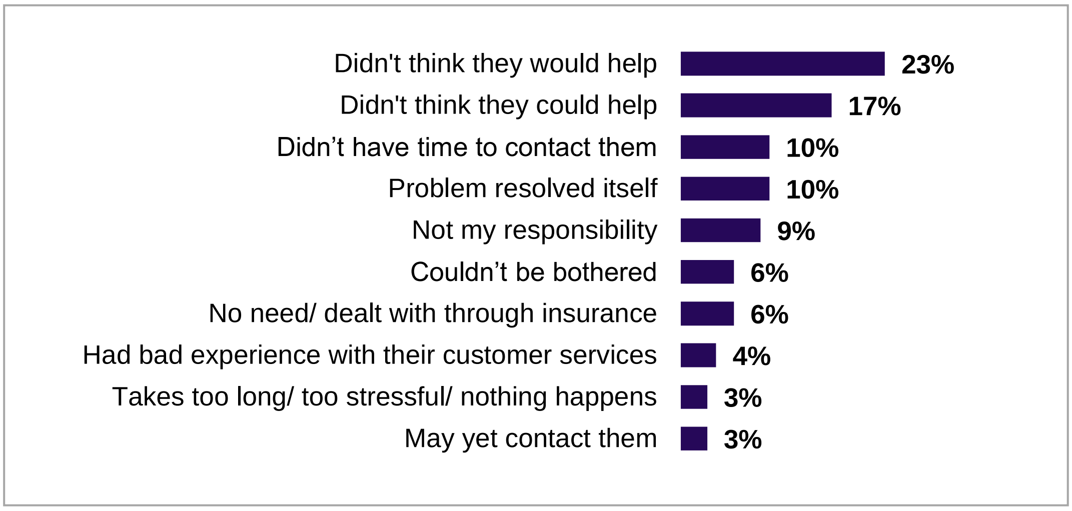
Figure 41: Reasons for dissatisfaction
Q32b. What caused your dissatisfaction?



Base: All who had reason to complain in the last 12 months and didn't: 262

3.7.12 The main reasons that respondents did not complain even though they felt they had good reason, is because they believe the water/sewerage company could not, or would not be able to help them.

Figure 42: Barriers to complaining
Q32c. Why didn't you contact your water/ sewerage company?

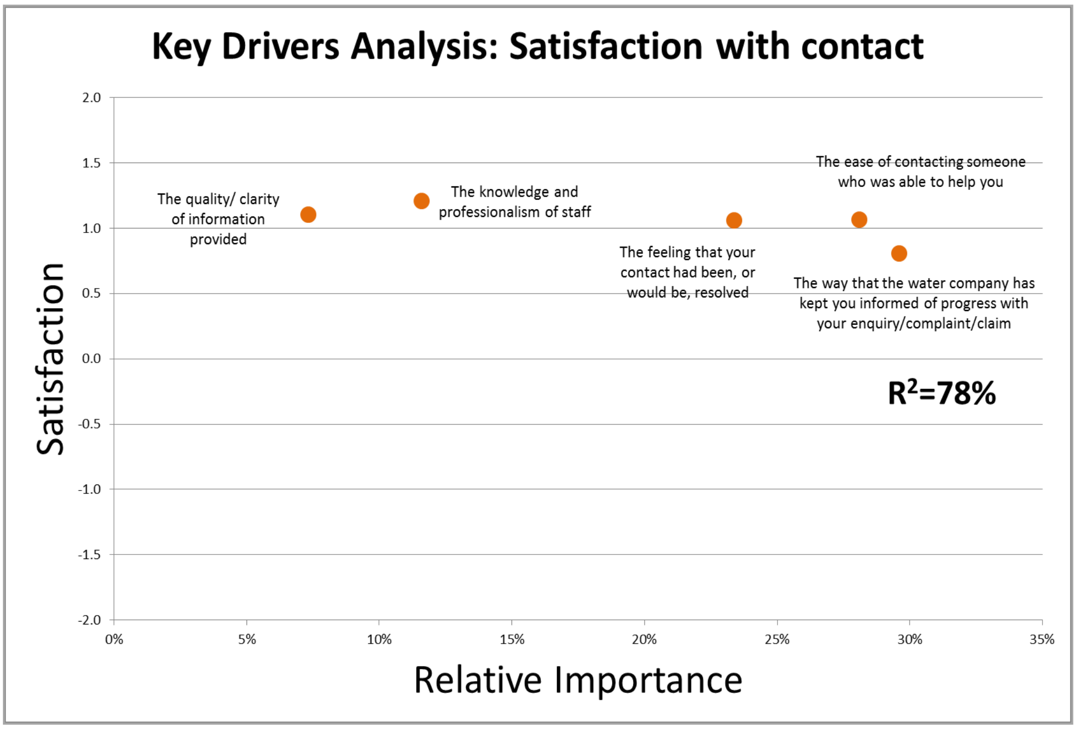


Base: All who had reason to complain in the last 12 months and didn't: 262

3.8 Key driver analysis of satisfaction with contact with water and/or sewerage company

3.8.1 Figure 43 indicates that aspects of contact handling are very strong drivers of satisfaction with contact. Ease of contact and how you are kept informed of progress with your enquiry/complaint/claim are the most important factors driving satisfaction.

Figure 43: Key driver analysis of satisfaction with contact with water and/or sewerage company (very strong driver)



Satisfaction scores are calculated as an average of scores ranging from -2 to +2, where +2 is very satisfied, +1 is fairly satisfied, 0 is neither satisfied nor dissatisfied, -1 is fairly dissatisfied and -2 is very dissatisfied.

Definition of R^2:

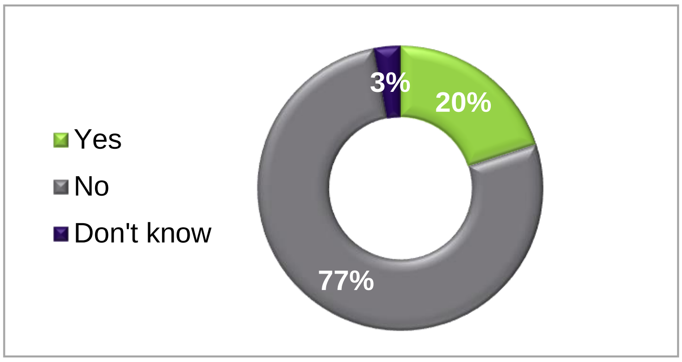
- R^2 is an index ranging from 0 to 100%.
- It is the proportion of those satisfied with contact about their water and sewerage services that is explained by these aspects of service.
- When R^2 is a small number e.g. less than 20% this means that the drivers (i.e. aspects of water service) do not explain a high proportion of the outcome – thus they are less useful in predicting and modelling the dependent variable.

- In market research, an R^2 between 40% and 60% means that the aspects tested are a good explanation for the findings.

3.9 Avoiding freezing pipes

3.9.1 Only one in five customers (20%) recalls receiving information about avoiding freezing pipes. This is similar to 2012 (19%).

Figure 44: Receipt of information about frozen pipes
Q39a. Have you received or come across any information in the last 12 months on how to avoid your water pipes freezing?



Base: All respondents: 5805

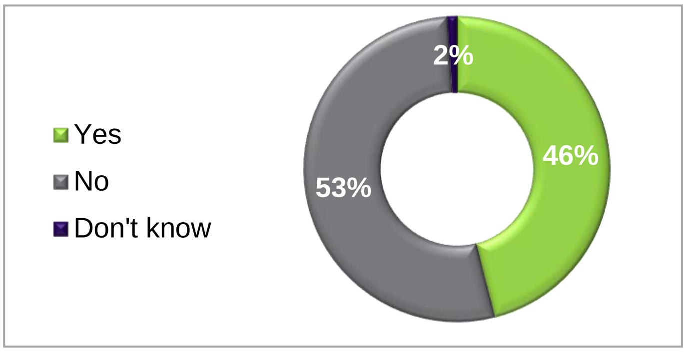
3.9.2 The following groups of customers are more likely to have seen information on freezing pipes:

- Customers in Wessex (27%), Yorkshire (24%) and the North West (24%) regions
- Those aware of Water Sure (30%) and services for the elderly (29%).

3.9.3 There has been a fall in the proportion of customers who have taken measures to avoid having frozen pipes, down to 46% from 55% in 2012.

Figure 45: Measures to avoid frozen pipes

Q39b. Has your household taken any measures to avoid having frozen water pipes this winter?



Base: All respondents: 5805

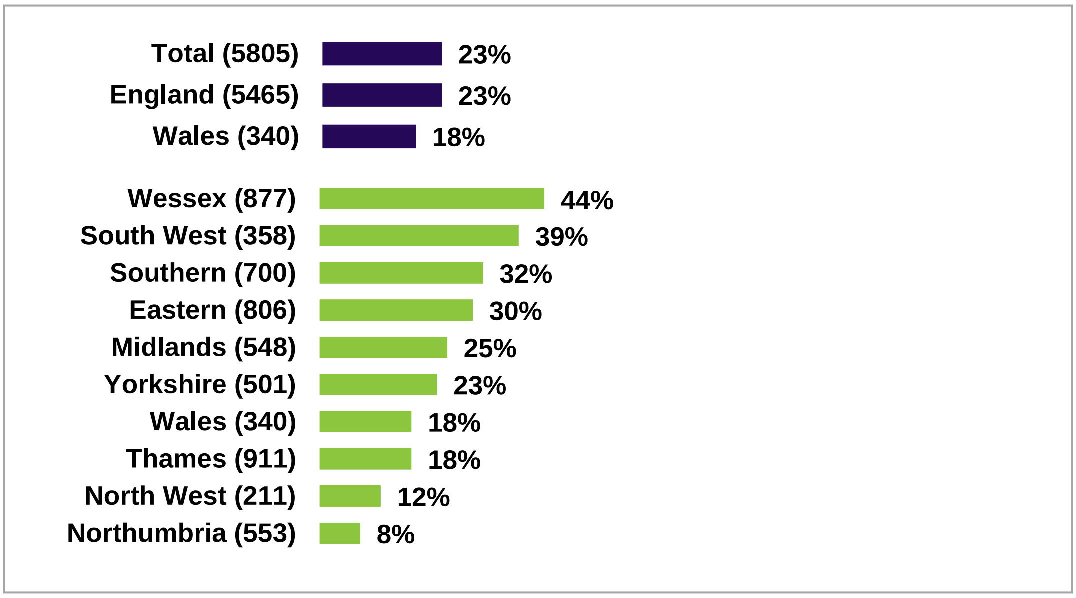
3.9.4 Older people are more likely than younger people to take measures to avoid freezing pipes (50% of 61+ compared to 26% of 18-34s). There are no marked differences by region.

3.10 Awareness of rainwater drainage rebate

3.10.1 For the first time in this survey, respondents were asked if they were aware of the option to have a reduced sewerage charge where rainwater that drains from their property does not enter the public sewer. Fewer than one in five are aware of this.

3.10.2 Awareness is highest in Wessex (44%) and the South West (39%) regions.

Figure 46: Awareness of rainwater drainage rebate (by country and region)
Q24. Are you aware that if none of the rainwater that runs off a property drains into the public sewer (e.g. it may drain into a soakaway or the ground), a reduced sewerage bill is available?



Base: All respondents

4. Water on tap

This chapter presents customers' views on their water supply such as their overall satisfaction, satisfaction with specific aspects of their supply, their reasons for using water wisely, and their understanding of who is responsible for the maintenance of water pipes.

SUMMARY

Key trends

- Satisfaction across a range of aspects of water supply is high and consistent with previous years.
- The reliability of supply continues to have the highest satisfaction levels.
- A large proportion of customers rely on common sense rather than hard information when deciding how to reduce their water use.
- Taking showers and turning off taps when brushing teeth remain popular ways of reducing water use.
- There is still some confusion over who is responsible for maintaining water pipes within a property's boundaries.

Key changes

- Satisfaction with the hardness/softness of water remains low (68%), but this is an improvement from 2012 (64%).

New questions/analysis

- Key driver analysis was conducted to determine the factors that influence customers' satisfaction with water supply. Aspects of water quality are a moderate driver of satisfaction. Water pressure is one of the most important aspects measured.

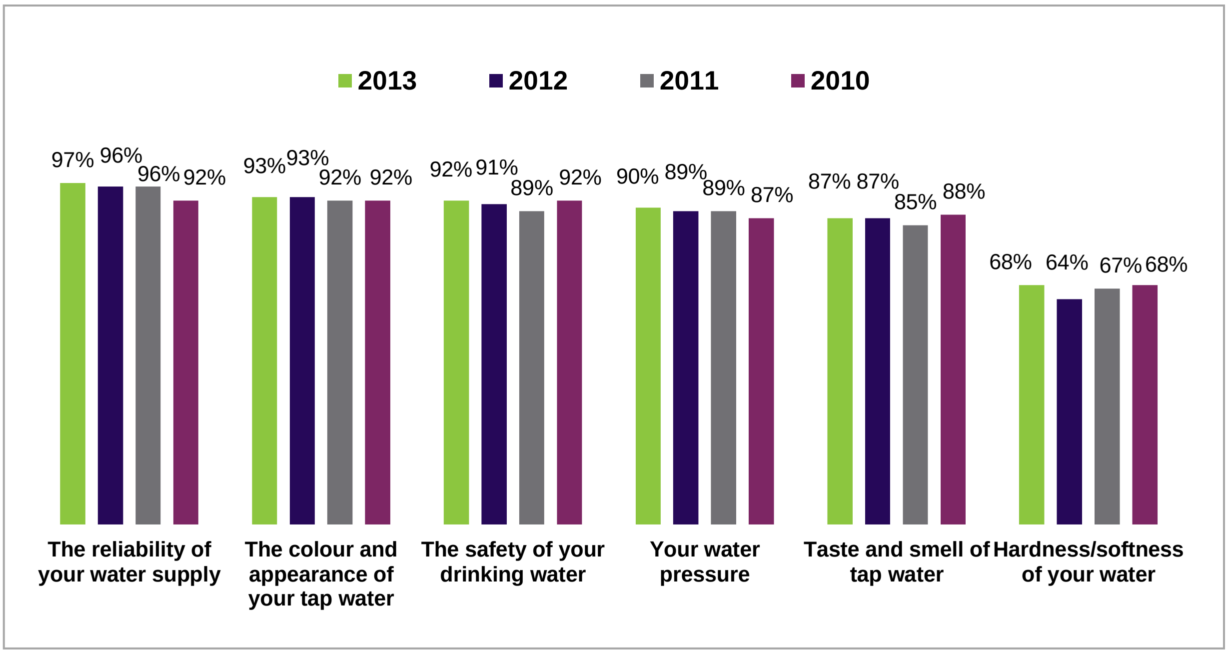
4.1 Satisfaction with water supply

4.1.1 In 2013 satisfaction with different aspects of water supply is high and consistent with previous years.

4.1.2 As in 2012, the reliability of supply continues to be given the highest satisfaction levels at 97% compared to 96% in 2012.

4.1.3 Satisfaction with the hardness/softness of water remains low (68%), but there is an improvement from 2012 (64%).

Figure 47: Satisfaction with quality of water supply
Q33. How satisfied are you with the following aspects of your water supply



Base: All respondents (Excluding DK)

4.1.4 Figure 48 presents the levels of satisfaction with various aspects of water supply by region where green is higher levels of satisfaction and red is relatively lower. Customers in Northumbria region are the most satisfied with their water supply (96%), with the colour and appearance of their tap water (95%) and the safety of their drinking water (95%). Customers in the Thames region are the least satisfied and are particularly dissatisfied with the hardness/softness of their water (50%).

Figure 48: Levels of satisfaction with various aspects of water supply by region

	% overall satisfaction with water supply	% the colour and appearance of your tap water	% taste and smell of tap water	% hardness/ softness of your water	% the safety of your drinking water	% the reliability of your water supply	% Your water pressure
Northumbria (552)	96	95	89	79	95	98	92
Midlands (547)	95	93	87	73	93	97	91
Yorkshire (500)	95	94	90	78	93	97	90
Wessex (874)	94	94	88	62	94	98	91
Wales (340)	94	93	88	90	92	99	94
North West (211)	94	94	90	87	93	99	91
Eastern (806)	94	94	89	54	93	97	89
South West (357)	92	95	87	90	93	97	91
Southern (699)	92	93	85	61	92	97	92
Thames (911)	91	91	85	50	90	97	87

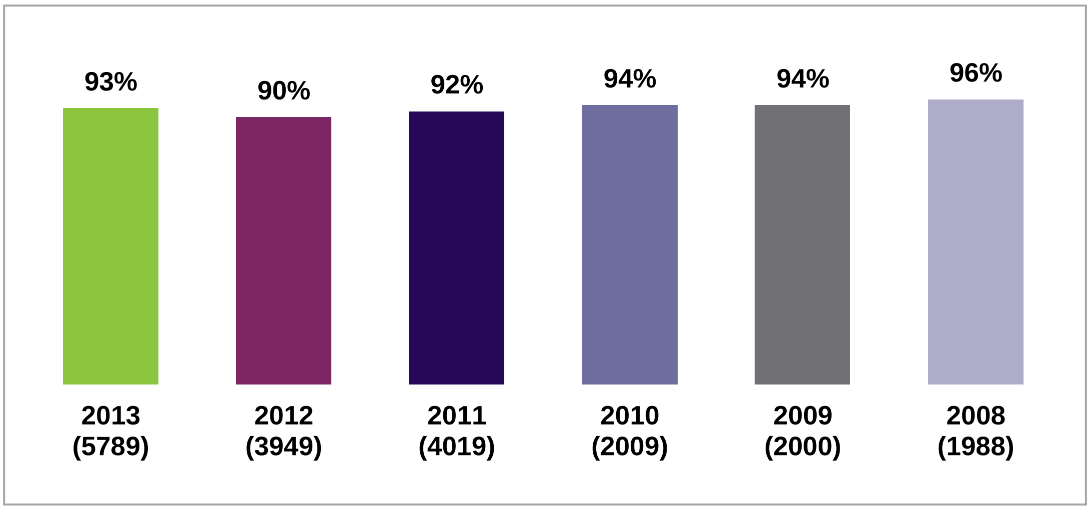
Best region Worst region

Base: Those responding to the question on overall satisfaction. The base size is indicative as the actual number for each cell will vary depending on those who say don't know to each question. (Excluding DK)

4.1.5 Customers aged 75+ years are more likely to be satisfied with the safety of their drinking water than respondents in other age groups (95% for those 75+ years compared to 89% in the 35-44 years group).

4.1.6 Overall satisfaction with water services has remained fairly constant. This year sees a small rise in satisfaction to 93% from 90% in 2012.

Figure 49: Overall satisfaction with water supply
Q34. Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your water supply?

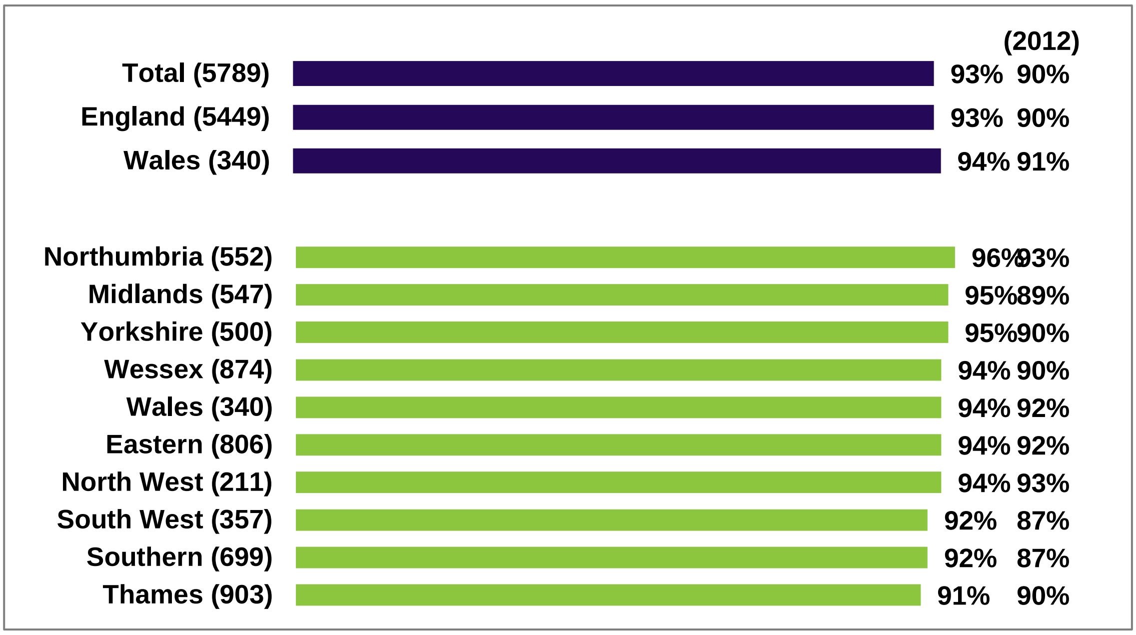


Base: All respondents (Excluding DK)

4.1.7 Overall, 62% of customers in Wales and 50% in England are very satisfied.

4.1.8 Customers in Northumbria (96%) have the highest level of satisfaction while Thames has the lowest levels; although at 91% this is still a strong rating.

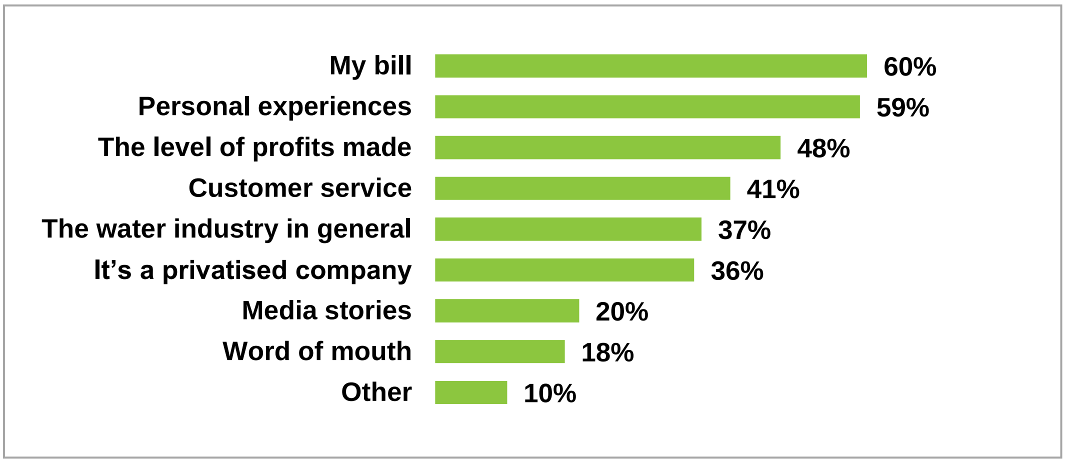
Figure 50: Satisfaction with water supply by country and region
Q34. Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your water supply?



Base: All respondents (Excluding DK)

4.1.9 Dissatisfied customers were asked whether any of the reasons in Figure 51 had affected their overall satisfaction. Customers mentioned three main reasons for dissatisfaction with water supply: the bill, personal experiences and the level of profits made by companies.

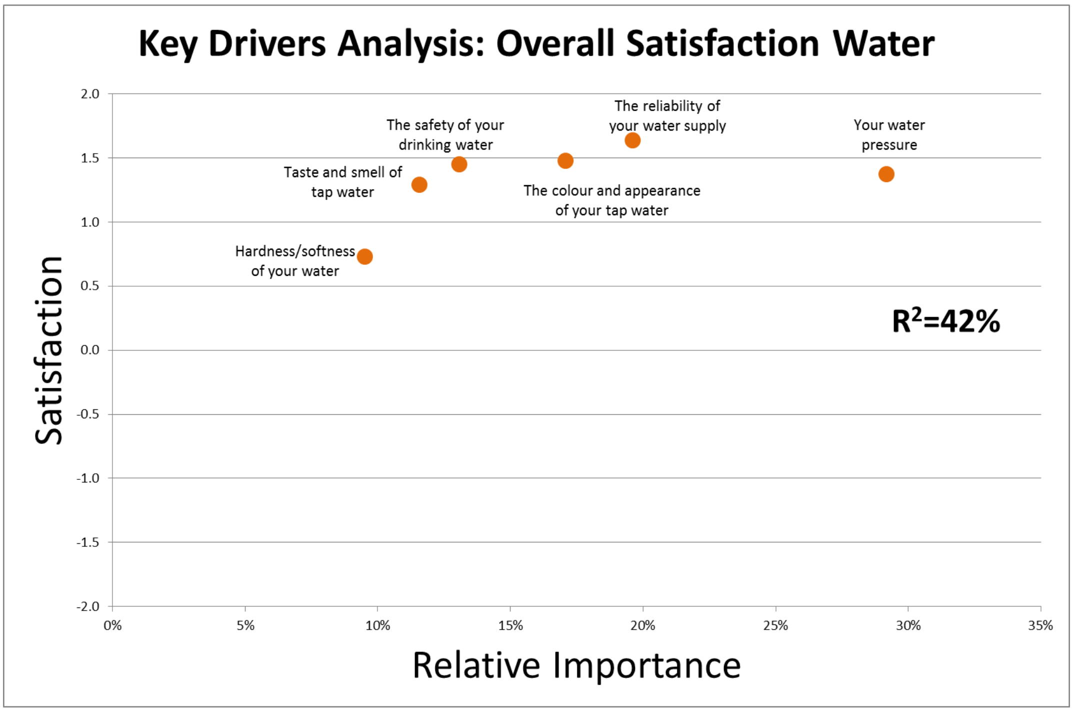
Figure 51: Reasons for dissatisfaction with water supply
Q35. Did any of the following influence your overall satisfaction?



Base: All respondents who are dissatisfied with aspects of their water supply (Excluding DK): 152

4.1.10 Key driver analysis was conducted to determine the factors that influence customers' satisfaction with water supply. Figure 52 indicates that aspects of water quality are positively linked to perceptions of satisfaction with water and explain 42% of the variance, which is a moderate driver. Water pressure is clearly one of the most important aspects driving overall satisfaction.

Figure 52: Key driver analysis for satisfaction with water (moderate driver)



Satisfaction scores are calculated as an average of scores ranging from -2 to +2, where +2 is very satisfied, +1 is fairly satisfied, 0 is neither satisfied nor dissatisfied, -1 is fairly dissatisfied and -2 is very dissatisfied.

Definition of R^2:

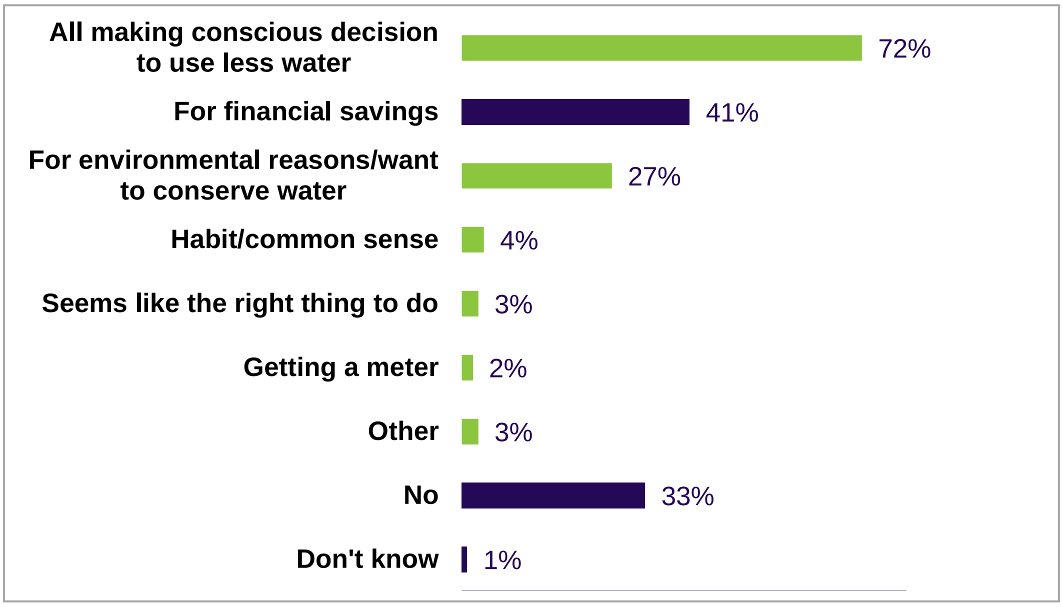
- R^2 is an index ranging from 0 to 100%.
- It is the proportion of those satisfied overall about their water service that is explained by these aspects of water supply.
- When R^2 is a small number e.g. less than 20% this means that the drivers (i.e. aspects of water service) do not explain a high proportion of the outcome – thus they are less useful in predicting and modelling the dependent variable.
- In market research, an R^2 between 40% and 60% means that the aspects tested are a good explanation for the findings.

4.2 Using water wisely

4.2.1 This year, for the first time customers were asked if they had made a conscious decision to use less water and if so why. Two-thirds of all customers (66%) reported that they had made a conscious effort to use less water. Many more metered customers (72%) than non-metered (59%) made a conscious decision.

4.2.2 The most popular reasons for consciously reducing water use amongst metered customers is for financial (41%) or environmental reasons (27%). Though not strictly comparable, the 2012 findings also revealed that financial savings was the top motivation for saving water amongst metered customers (69%).

Figure 53: Reasons for reducing water usage
Q36. Have you made a conscious decision to use less water in the last three years?



Base: All metered respondents: 3052

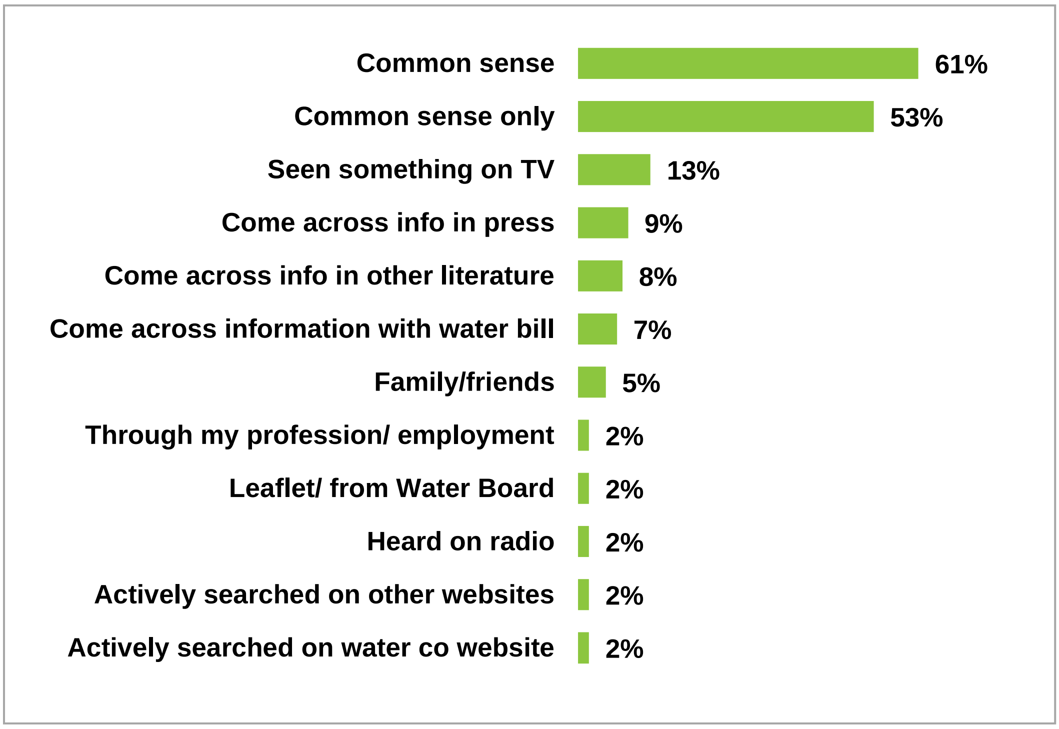
4.2.3 More than any other region, customers in the South West (44%) are most likely to be using less water for financial reasons. A high proportion of these customers are on a water meters.

4.2.4 Customers in the Thames region (41%), and to a lesser extent the Southern region (36%), are more altruistic with a greater likelihood to be driven by environmental concerns. Altruism is also greater among customers in the highest social groups (social groups AB).

4.2.5 Inaction to save water is most likely to be found in Northumbria, Midlands, North West and Yorkshire, and among the DE group, and unmetered customers.

Figure 54: Information sources for how to save money on water and sewerage bills

Q38. How did you find out how to reduce your use of water?

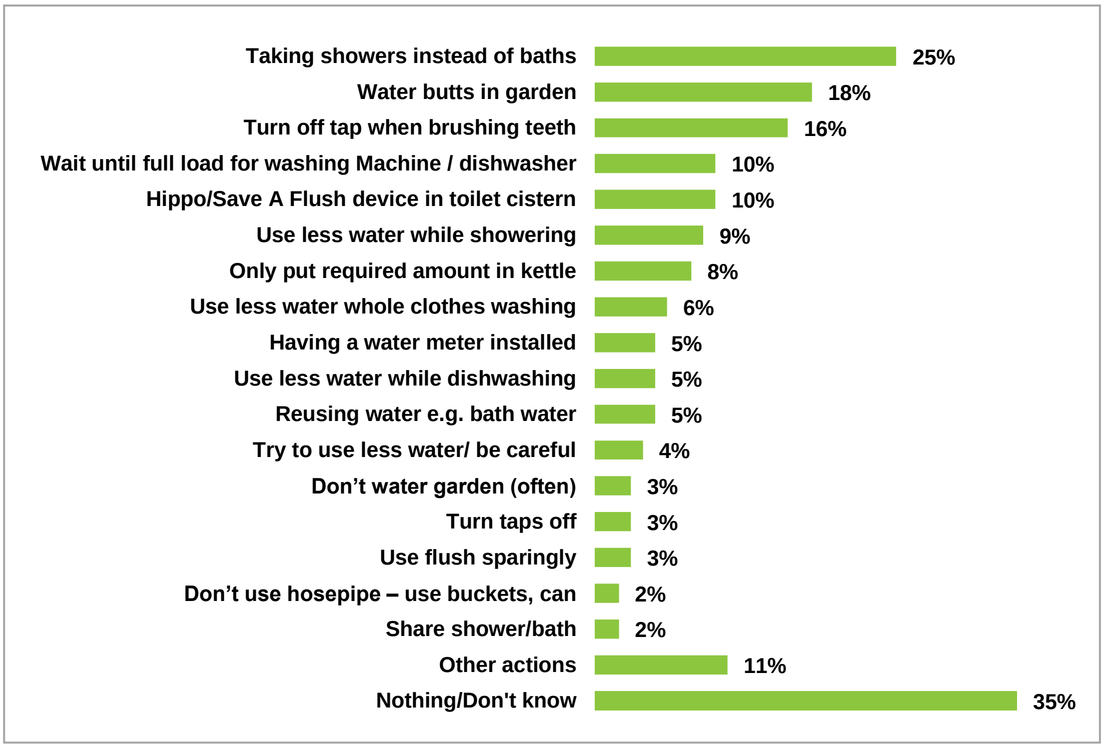


Base: Those who have made a conscious decision to use less water in the last three years: 3891

4.2.6 Customers are using a variety of sources to find out how to reduce their water usage. However, 53% rely on common sense alone, rather than hard information.

4.2.7 The top three water saving actions are: taking showers instead of baths (which is down to 25% from 36% in 2012), using water butts in the garden (18% this year compared to 13% in 2012) and turning off taps when brushing teeth (down to 16% from 27% in 2012). Just under a third (30%) of those who said they take a shower to save water indicated that they used a power shower, which may actually use more water than a bath and suggests a low level of awareness around water saving activities.

Figure 55: Measures taken to reduce water usage (unprompted)
Q37a. What actions have you and your household taken to reduce your use of water?



Base: All those that have made a conscious decision (3792).

4.3 Maintenance of water pipes

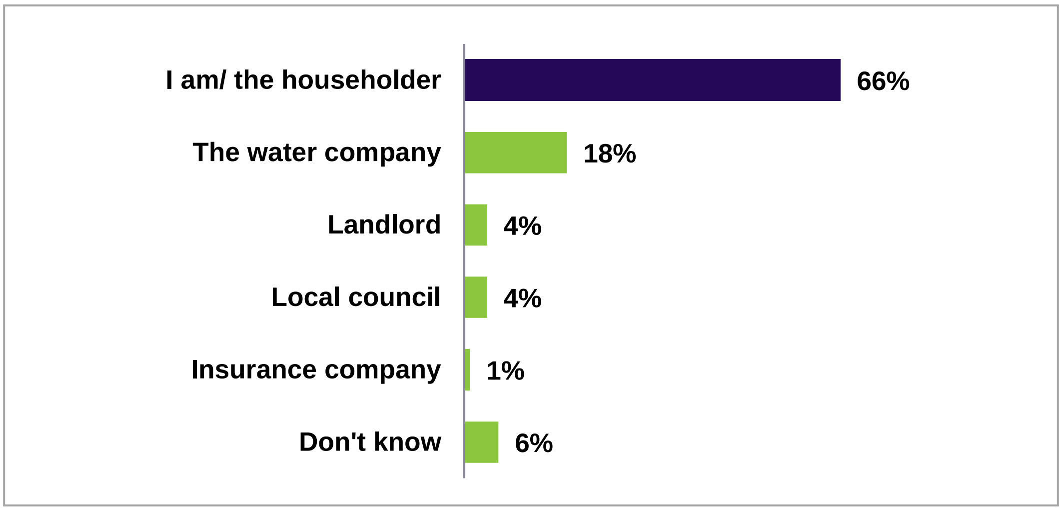
4.3.1 There is still confusion over who is responsible for maintaining water pipes within a property's boundaries.

4.3.2 Most customers know that they are responsible for their maintenance (66% in 2013 and 2012). However, there is a slight increase, up to 18% from 12% in 2012, in the proportion of customers who incorrectly think that the water company is responsible.

4.3.3 The following groups of customers are significantly more likely to be aware that they are responsible for the maintenance of water pipes:

- Social grades AB (80%) compared to social grades C1C2 (65%) and social grades DE (50%)
- Metered customers (69%) compared to unmetered customers (62%). This pattern is similar to 2012.
- Rural customers (68%) compared to urban customers (64%)
- Owner/lease holder (75%) compared to renters (23%)
- Customers from a white background (67%) compared to customers from a black or minority background (42%).

Figure 56: Maintenance of water pipes
Q27a. Who do you think is responsible for maintaining the water pipes within your property's boundaries?



Base: All respondents: 5805

5. A sewerage system that works

This chapter presents customers' views on the disposal of waste down the toilet, sink or drain. It also summarises how satisfied customers are with the sewerage services they receive.

SUMMARY

Key trends

- An increasing number of customers are unclear about what should not be disposed of down a toilet, sink or drain. Continuing on the trend from 2012, more customers think (incorrectly) that is it appropriate to dispose of items such as tissues, tampons, wipes, medicines, condoms, etc. down a toilet, sink or drain.
- Overall satisfaction with sewerage services has remained fairly constant at 87% and shows a small rise from 85% in 2012.

Key changes

- Somewhat surprisingly despite a small rise in satisfaction with sewerage services, satisfaction with individual aspects of sewerage services has fallen.
- Whilst there is a fall in the proportion of customers who incorrectly think they are responsible for sewers and drains in company ownership (33% compared to 42% in 2012), this is not matched by an increase in those who correctly identify the sewerage company as responsible (28% compared to 30% in 2012). Instead there is a corresponding increase in the proportion who 'don't know' who is responsible. This has increased to 21% from 12% in 2012.

New questions/analysis

- Key driver analysis indicates that customers' perceptions of the quality of various aspects of sewerage services are moderate drivers of overall satisfaction with sewerage services. Minimising sewer flooding and maintenance of sewerage pipes are the most important factors.

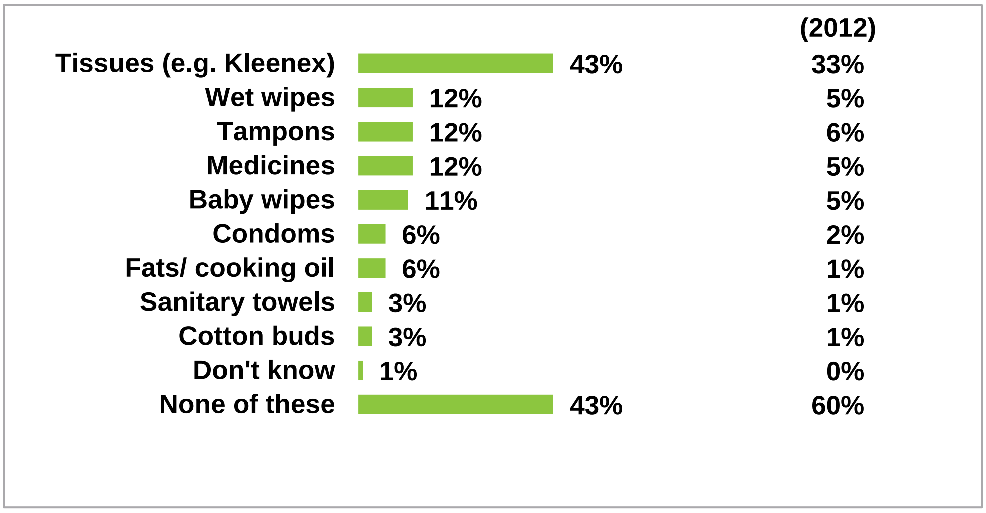
5.1 Disposing of waste

5.1.1 Customers were prompted with a list of products and asked which, if any, are appropriate to dispose of down the toilet, sink or drain. Fewer customers this year (43% compared to 60% in 2012) correctly identified that none of these items should be disposed of down a toilet, sink or drain.

5.1.2 The largest rise has been in the proportion of customers who think that tissues can be disposed of in this way: up to 43% now say this, compared to 33% in 2012. Although fewer customers indicated that the other items could be disposed of in this way, the proportions have mostly doubled for each item in the last year.

Figure 57: What can acceptably be disposed of down the toilet, sink or drain

Q40. Which of the following do you think are OK to dispose of down the toilet, sink or drain?



Base: All respondents: 5805

5.1.3 Similar to 2012, customers aged 61+ years are considerably more aware that none of these items should be disposed of down the toilet, sink or drain; and customers aged 75+ years are particularly aware of this fact (54% for those aged 75+ years compared to 32% for the 18-34 years group).

5.2 Satisfaction with sewerage services

5.2.1 In line with 2012, a notable proportion of customers were unable to rate their satisfaction (i.e. answered ‘don’t know’) with various elements of sewerage services. This might indicate that customers have low awareness or might not have experienced problems with these aspects of service delivery and are therefore not able to respond. The proportion of customers who could not rate the following aspects of sewerage services is as follows:

- Cleaning waste water properly before releasing it back in to the environment 24%
- Minimising sewer flooding 19%
- Maintenance of sewerage pipes and treatment works 17%
- Reducing smells from sewerage treatment works 14%

5.2.2 For those customers who did rate service aspects, satisfaction with all elements of sewerage services is down from previous years.

Figure 58: Satisfaction with elements of sewerage services

Q41. How satisfied are you with your sewerage company's management of the following aspects of their service….

Base: All respondents using sewerage services (Excluding DK)

5.2.3 Figure 59 illustrates levels of satisfaction with various aspects of sewerage services by region where green is high satisfaction and red is low. Overall, and similar to 2012, satisfaction is highest in Northumbria (92%) and Midlands (91%). In 2012 satisfaction was lowest in the South West region, but in 2013 it is lowest in the Southern region (84%) and Thames region (84%).

Figure 59: Satisfaction with elements of sewerage service by region
Levels of satisfaction with various aspects of sewerage by region are ranked using colour coding (green = best/ red = worst).

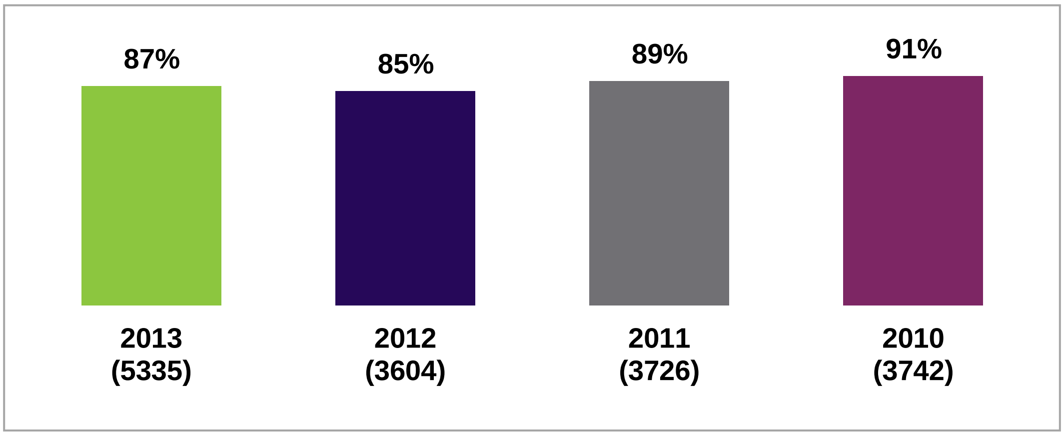
	% overall satisfied with sewerage service	% satisfied with reducing smells from sewage treatment works	% satisfied with maintenance of sewerage pipes and treatment works	% satisfied with cleaning waste water properly before releasing it back into the environment	% satisfied with minimising sewer flooding
Northumbria (521)	92	69	76	76	75
Midlands (508)	91	70	76	77	72
Wales (301)	89	70	77	78	74
North West (203)	89	65	67	74	70
Wessex (790)	88	65	75	76	69
Yorkshire (467)	87	65	72	74	67
Eastern (747)	86	62	68	74	69
South West (315)	86	68	76	74	66
Southern (655)	84	60	67	70	65
Thames (828)	84	57	65	67	63

Best region   Worst region

Base: Those that responded to the question about satisfaction with their sewerage service. The base size is indicative as the actual number for each cell will vary depending on those who say don't know to each question. (Excluding DK)

5.2.4 Overall satisfaction with sewerage services has remained fairly constant. This year sees a small rise in satisfaction after the decline seen 2012. This is despite the drops seen in the various aspects of sewerage service, and indicates that the overall satisfaction takes account of other factors that are not measured.

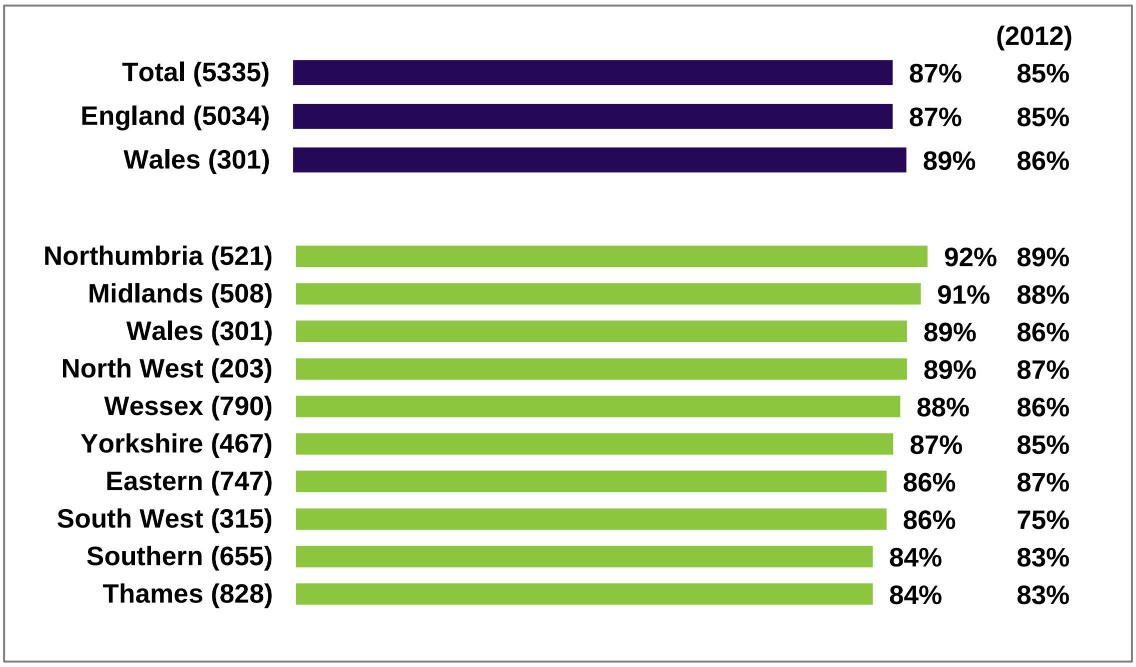
Figure 60: Overall satisfaction with sewerage services
Q42a. Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service?



Base: All respondents excluding those who do not have sewerage services and excluding DK

5.2.5 Overall, 48% of customers in Wales and 35% in England are very satisfied.

Figure 61: Overall satisfaction with sewerage services by country and region
Q42a. Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service?



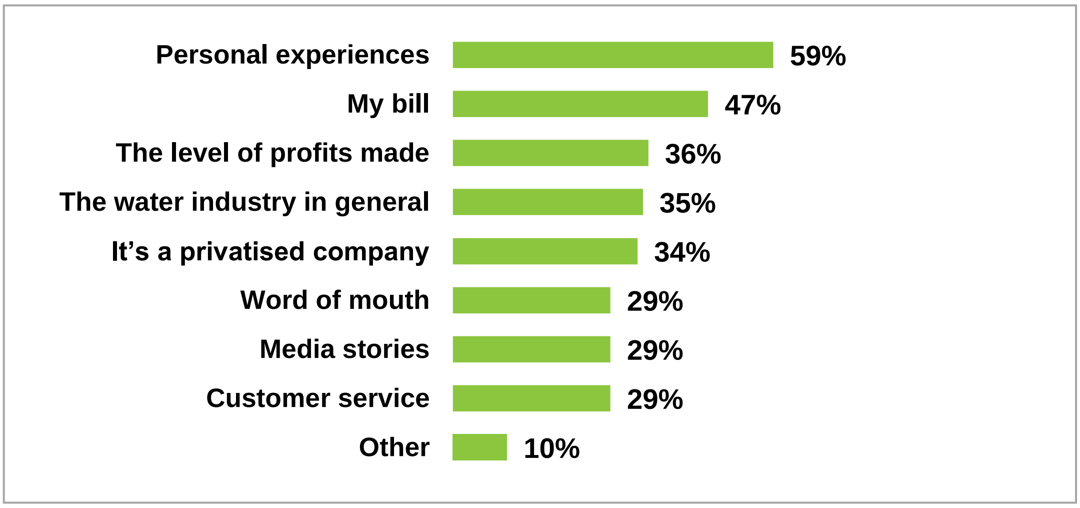
Base: Those who use sewerage services (Excluding DK)

5.2.6 Customers are considerably more likely to be satisfied with their sewerage services if they:

- Are aged 75+ years (93%)
- Requested a meter (90%)
- Had not contacted their company (88%)
- Are satisfied with the contact they had with their company (87%) if they had contacted them.

5.2.7 Personal experiences and issues with bills are the core reasons for dissatisfaction among customers. Customers dissatisfied with the bill, levels of profit made by their supplier and the privatised status of their company are also likely to be dissatisfied with their water supply. Customers who give low scores for value for money of sewerage services are likely to be also be dissatisfied with these aspects of service.

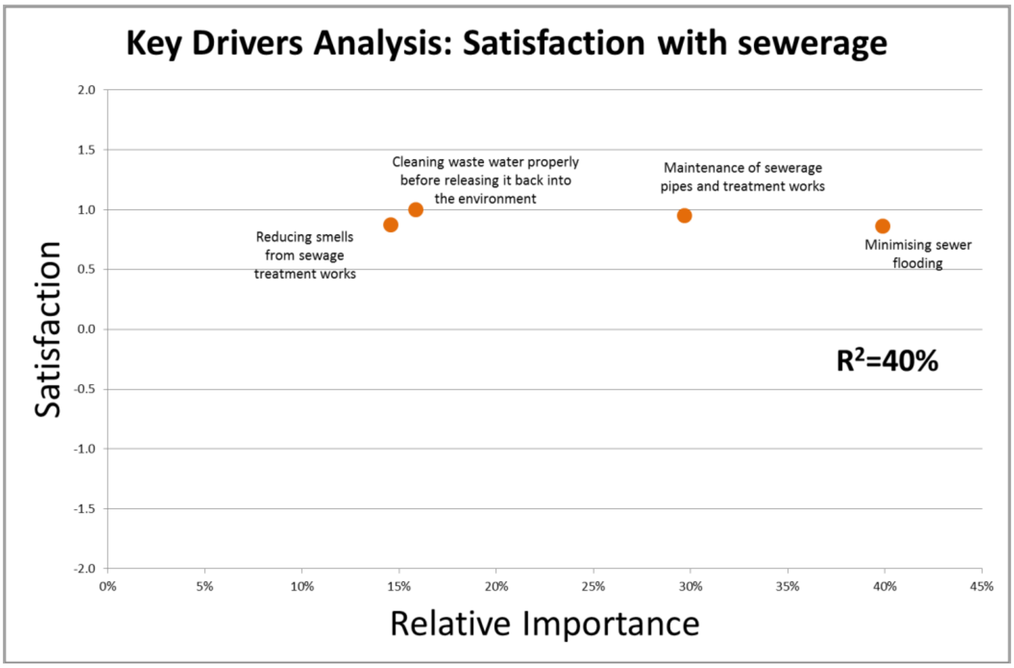
Figure 62: Reasons for dissatisfaction with sewerage services
Q42b. Did any of the following influence your overall satisfaction?



Base: All respondents (Excluding DK): 177

5.2.8 Figure 63 indicates that aspects of sewerage quality are positively linked to perceptions of satisfaction with sewerage and explain 40% of the variance, which is a moderate driver. This explains why overall satisfaction with sewerage has increased despite individual aspects showing small declines, as other elements that were not included would explain the remaining 60% of the variance. Minimising sewer flooding and maintenance of sewerage pipes are the most important factors.

Figure 63: Key driver analysis of satisfaction with sewerage services (Moderate driver)



Satisfaction scores are calculated as average of scores ranging from -2 to +2, where +2 is very satisfied, +1 is fairly satisfied, 0 is neither satisfied nor dissatisfied, -1 is fairly dissatisfied and -2 is very dissatisfied

Definition of R^2:

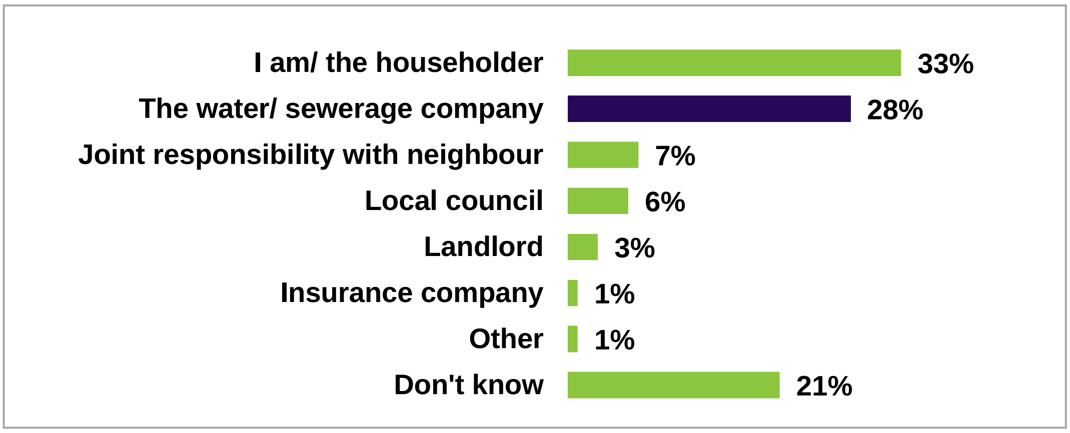
- R^2 is an index ranging from 0 to 100%.
- It is the proportion of those satisfied overall about their sewerage service that is explained by these aspects of sewerage supply.
- When R^2 is a small number e.g. less than 20% this means that the drivers (i.e. aspects of water service) do not explain a high proportion of the outcome – thus they are less useful in predicting and modelling the dependent variable.
- In market research, an R^2 between 40% and 60% means that the aspects tested are a good explanation for the findings.

5.3 Responsibility for sewerage pipes

5.3.1 There is still confusion among customers over who is responsible for maintaining sewerage pipes and drains that run within their property's boundaries. Whilst there is a fall in the proportion of customers who incorrectly think they are responsible for sewers and drains in company ownership (33% compared to 42% in 2012), this is not matched by an increase in those who correctly identify the sewerage company as responsible (28% compared to 30% in 2012). Instead there is a corresponding increase in the proportion who 'don't know' who is responsible. This has increased to 21% from 12% in 2012.

Figure 64: Maintenance of sewerage pipes

Q27b. Who do you think is responsible for maintaining any shared sewerage pipes and drains that run within your property's boundaries?



Base: All who use sewerage services: 5488

6. Comparisons with other utilities

This chapter focuses on how customers view water companies compared to other utilities. It looks specifically at consumers' trust in companies and the extent to which companies are seen as caring about the service they provide.

SUMMARY

Key trends

- Positively, suppliers of water and sewerage services continue to be seen as more caring than energy suppliers.
- Average trust scores have remained fairly constant for water and sewerage, but trust in energy suppliers continues to decrease.
- As with 2012, customers are more satisfied with water and sewerage services than with the services provided by other utility companies.

Key changes since 2012

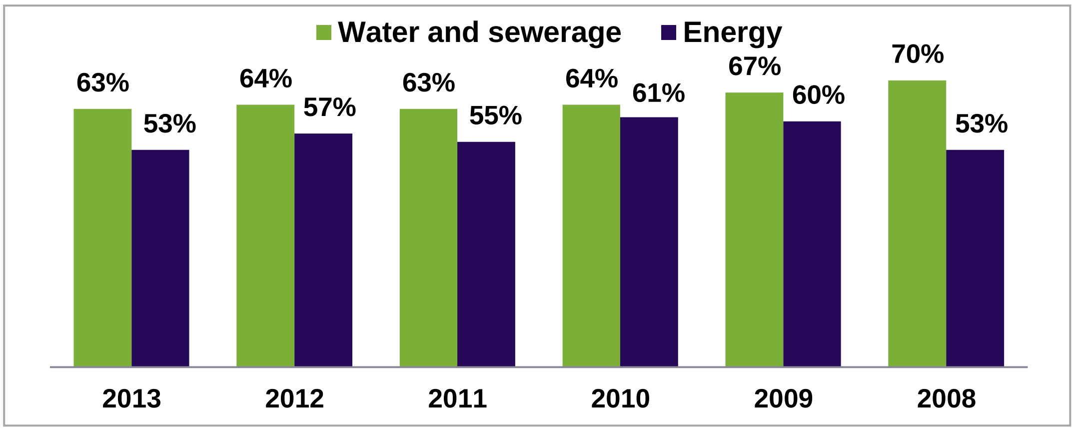
- There has been a considerable increase in satisfaction with council services, from 58% in 2012 to 80% in 2013. However this may be due to the change in the wording of the question which now refers to 'council services' rather than 'council tax'

6.1 Companies caring about the service they provide

6.1.1 Positively, suppliers of water and sewerage services (63%) continue to be seen as more caring than energy suppliers (53%). These findings have been relatively stable for a number of years.

Figure 65: Water/sewerage and energy companies care about service provided to customers

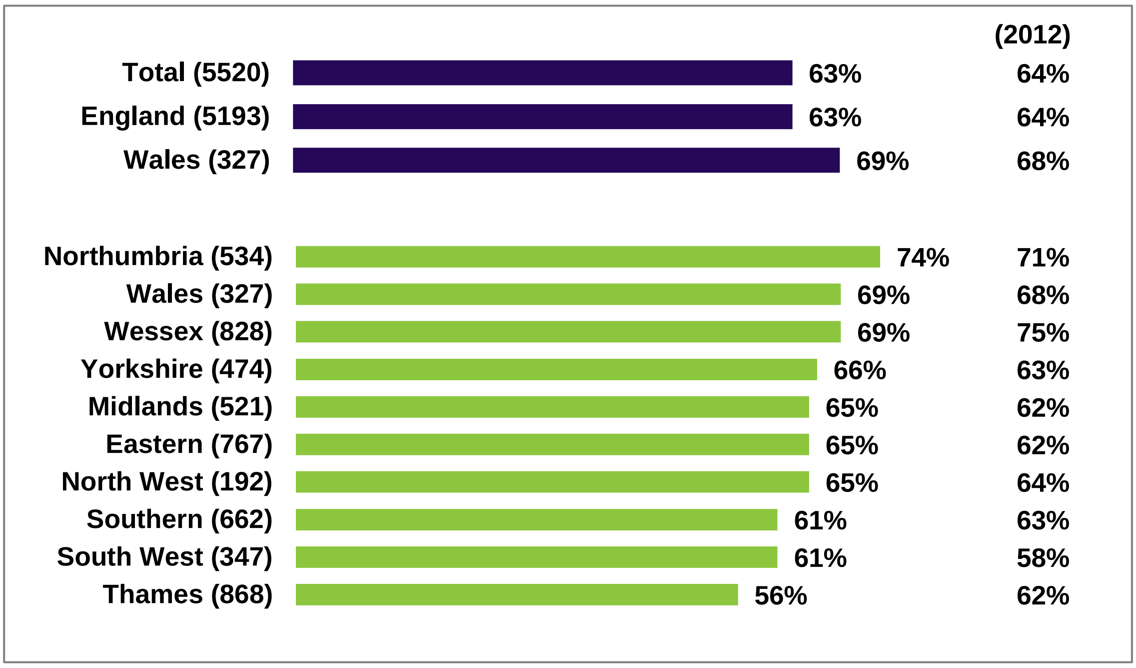
Q44. How much do you agree or disagree that your <water/ water and sewerage> company cares about the service it gives to customers? Q45. How much do you agree or disagree that your <energy/ gas or electricity/ electricity> company cares about the service it gives to customers?



Base: All respondents (Excluding DK)

6.1.2 In Wales 26% of customers agree strongly that water and sewerage companies care about the service they provide, while this proportion is 16% in England.

Figure 66: Water/sewerage and energy companies care about service provided to customers by country and region
Q44. How much do you agree or disagree that your <water/ water and sewerage> company cares about the service it gives to customers?



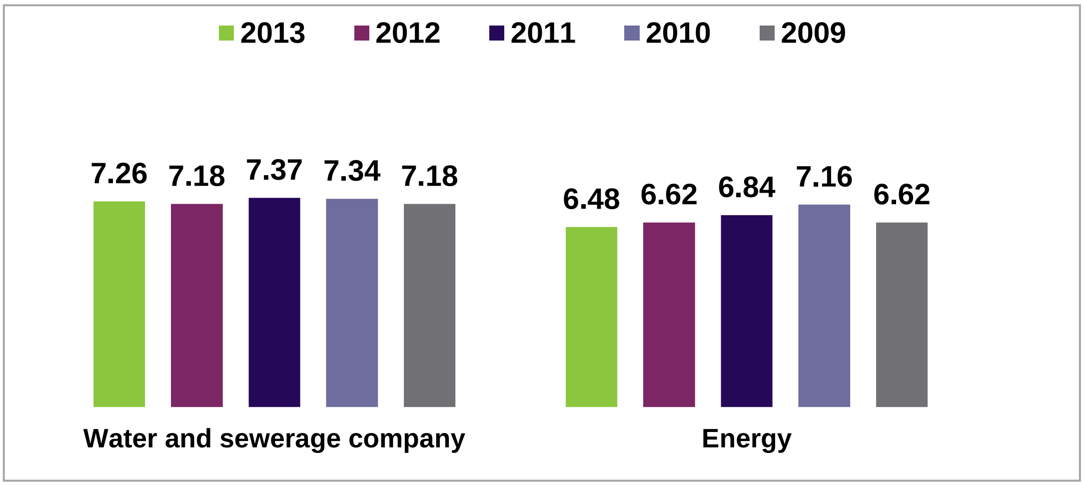
Base: All respondents (Excluding DK)

6.1.3 Customers in Northumbria region are the most likely to agree that their water/sewerage company cares about services whilst Thames region customers are the least likely to hold this view.

6.2 Trust in water and sewerage companies compared to energy companies

6.2.1 Customers were asked how much they trust their water and/or sewerage company and energy company on a scale of one to ten (1 = no trust and 10 = complete trust). As is evident in Figure 67, average trust scores have remained fairly constant for water and sewerage, but trust in energy suppliers continues to decrease. Again, this may be linked to the extensive media coverage of energy price rises prior to and during the fieldwork period.

Figure 67: Level of trust in water/sewerage and gas/electricity companies
Q46a. How much do you trust your <water/ water and sewerage> company?

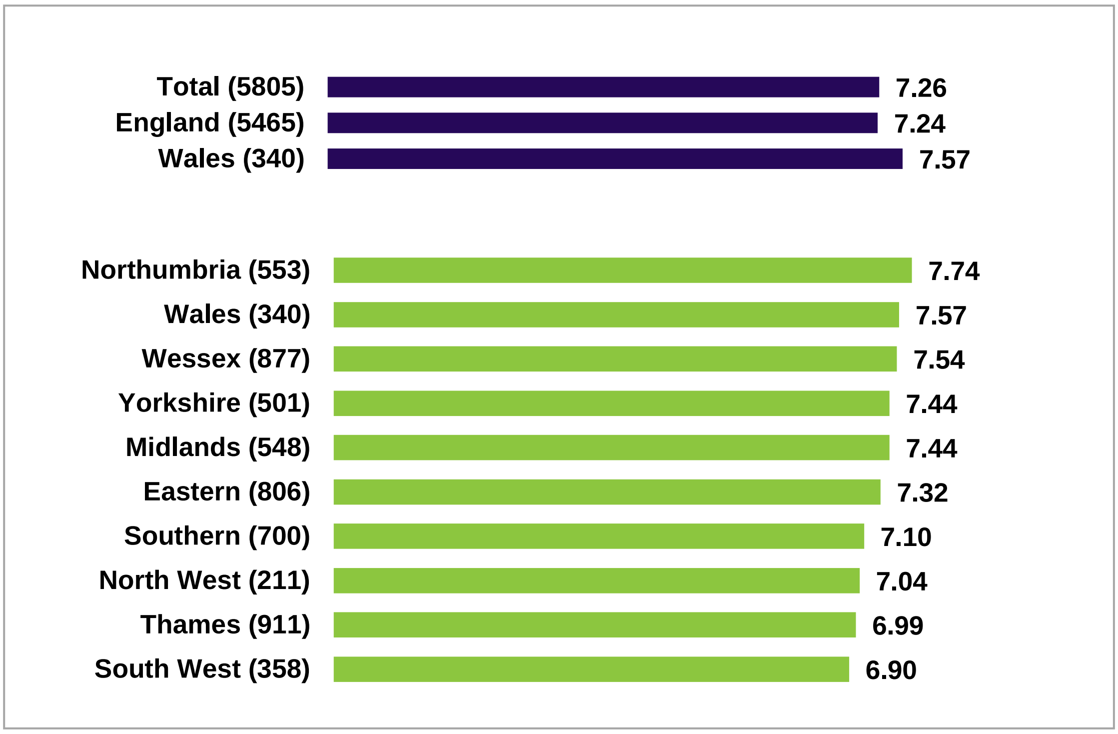


Base: All respondents

6.2.2 At a national level, 60% in Wales and 53% in England score 8-10 on the scale measuring their level of trust in their water/sewerage company.

6.2.3 Wales has higher levels of trust (7.57) than England (7.24).

Figure 68: Level of trust in water/sewerage by country and region
Q46a. How much do you trust your <water/ water and sewerage> company?



Base: All respondents

6.2.4 At a regional level, Northumbria has the highest levels of trust (7.74) and South West has the lowest levels (6.90).

6.2.5 Customers aged 75+ years are considerably more likely than other age groups to score 8-10 (69%), indicating a very high level of trust in their water and/or sewerage companies, as were one-person households (62%).

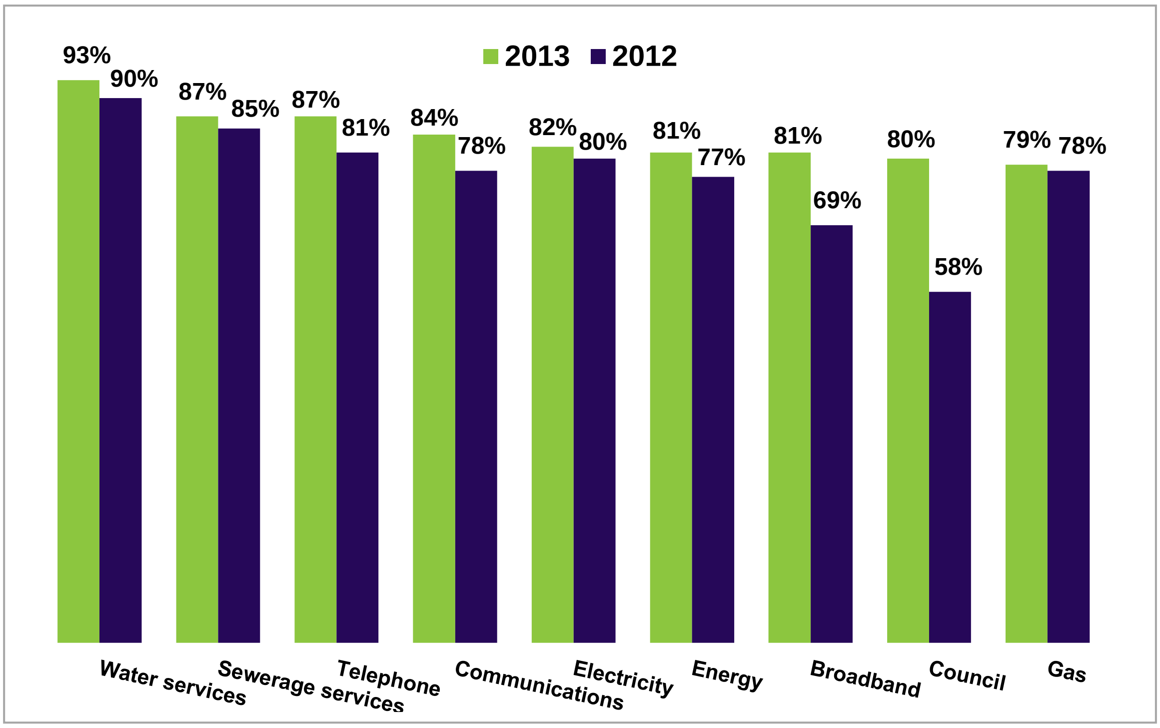
6.3 Satisfaction with services

6.3.1 As with 2012, customers are more satisfied with water and sewerage services than with the services provided by other utility companies.

6.3.2 There has been a considerable increase in satisfaction with council services, from 58% in 2012 to 80% in 2013. However this is due to the change in the wording of the question which now refers to 'council services' rather than 'council tax'.

6.3.3 Satisfaction with energy companies' services has recovered somewhat from the substantial drop in 2012 (81% in 2013; 77% in 2012; 83% in 2011).

Figure 69: Overall satisfaction with household service providers
Q43. How satisfied or dissatisfied are you with...



Base: All respondents

6.4 Sharing the benefits

6.4.1 Customers were asked what they would prefer their water and/or sewerage company to do with any potential financial benefits from out-performing. They could choose more than one option for most important, to fourth most important, and provide their own option, if they wished. Where they provided their own option this was coded alongside other similar options. Figure 70 indicates the choices customers made when all the options were combined. An analysis of the rating of importance revealed the same priorities.

6.4.2 The most popular response was 'spend more on improving services that customers think are important rather than using customer bills to finance improvements',(50%), followed by 'provide more financial help to customers on low incomes' (42%) and 'provide a one-off rebate to all customers' (32%).

6.4.3 In Wales the same three options were the most frequently chosen, but 'providing more financial help to customers on low incomes' was the most popular (47% in Wales compared to 41% in England). However, this difference was just short of statistical significance.

6.4.4 Those from the Thames (53%), Southern (53%) and Yorkshire (55%) regions were slightly more supportive of the improving services option; and those from the South West (45%) were more supportive of providing a one-off rebate to customers on a low income.

6.4.5 Rewarding shareholders was the fourth most popular option, supported by 7% of customers. Younger people aged 18-34 years were slightly more likely to choose this option (10%).

6.4.6 A similar question was asked in 2012 but as not all customers were asked and the wording was different, direct comparisons are not possible. However, the most popular choice at that time was to see financial rewards given back to customers to keep bills down (52%) followed by improving services that customers believe are important (26%) and providing financial support to those on low incomes. Taken together with this year's findings there is a common theme to keep bills down..

Figure 70: Overall importance of different ways of sharing the benefits of profits
Q54. Sometimes companies perform better than expected and therefore make more profit. If this happens, which of the following would you prefer them to do? (All levels of importance combined).

	Total (5805)	England (5465)	Wales (340)
Spend more on improving services that customers think are important rather than using customer bills to finance improvements	50%	51%	46%
Provide more financial help to customers on low incomes who genuinely struggle to pay bills rather than customer bills financing this support	42%	41%	47%
Provide a one-off rebate on the bill to all customers (although this may only be a few pence per customer)	32%	32%	32%
Reward shareholders who have invested in the water and/or sewerage company beyond the level of return they were expecting	7%	7%	7%
Reduction in price/ cheaper bills/ keep cost down	2%	2%	3%
Other	1%	1%	1%
Don't know	4%	4%	5%

Base: All respondents.

7. Speaking up for water consumers

This chapter focuses on customers' views on the importance of having a consumer organisation such as CCWater to represent their interests when it comes to the provision of water and sewerage services. It also comments on the ways in which consumers are likely to go about contacting CCWater if they need to.

SUMMARY

Key trends

- Overall, customers still believe that it is important to have a consumer body representing their interests about the water and sewerage services they receive.
- As in 2012, looking for the contact information online through a search engine such as Google is the most likely point of call.

Key changes since 2012

- There is a fall in the proportion who feel very strongly about having representation from 75% in 2012 to 70% in 2013.

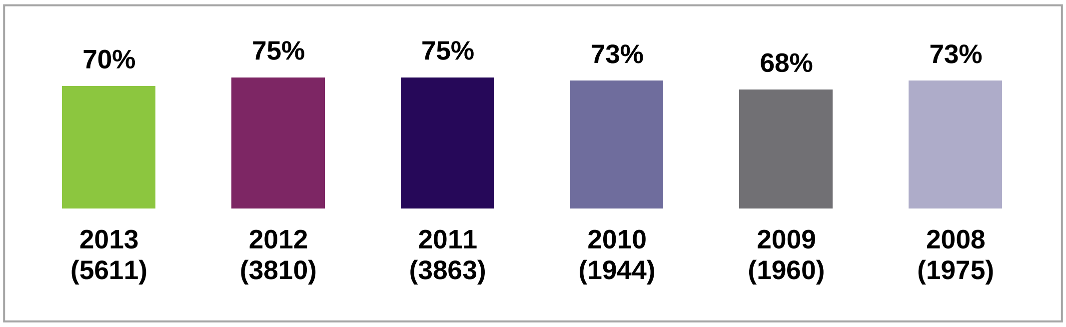
7.1 Perceived importance of CCWater

7.1.1 Overall, customers still believe that it is important to have a consumer body representing their interests about the water and sewerage services they receive. In total, 93% of customers feel consumer representation is absolutely essential, very important or fairly important, compared to 94% in 2012.

7.1.2 However, there is a dip in customers who feel very strongly about representation. The proportion of customers who say that it is extremely or very important has dropped to 70% from 75% in 2012.

Figure 71: Importance of having a consumer body to protect their interests (chart only shows absolutely essential and very important %)

Q56. How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive?



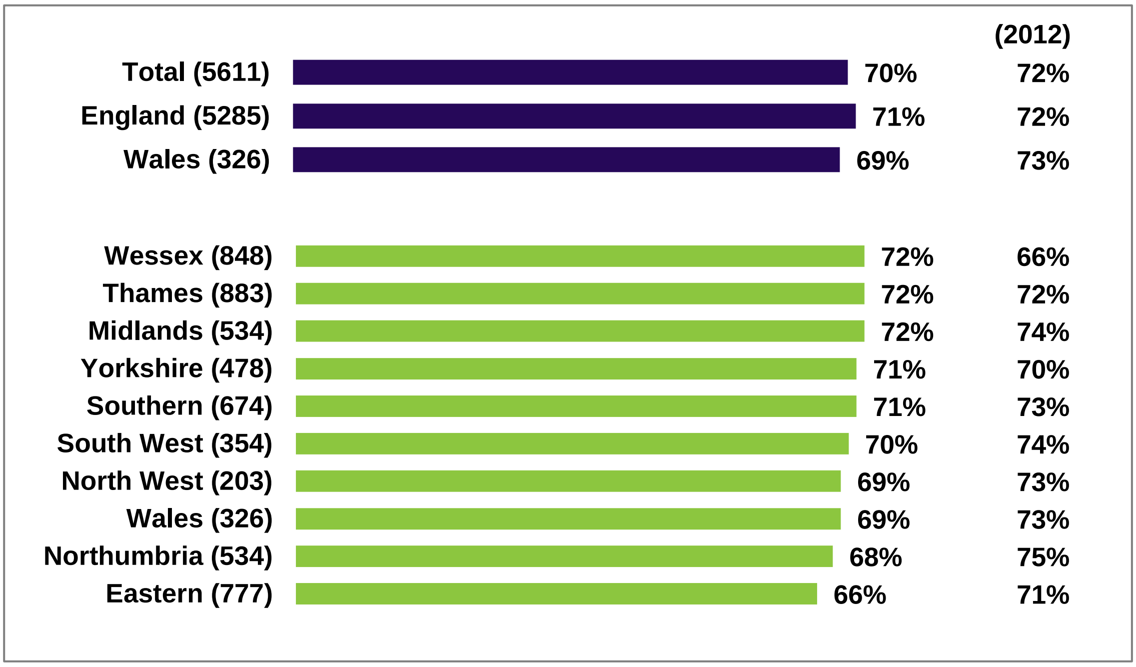
Base: All respondents (Excluding DKs)

7.1.3 Despite this decrease, just 7% of customers feel that it is not important to be represented.

7.1.4 There is very little difference between the views of customers in England and Wales about the importance of having their interests represented through a consumer body.

Figure 72: Importance of having a consumer body to protect their interests (by country and region)

Q56. How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive?



Base: All respondents (Excluding DKs)

7.1.5 Support for representation is fairly consistent across the different regions.

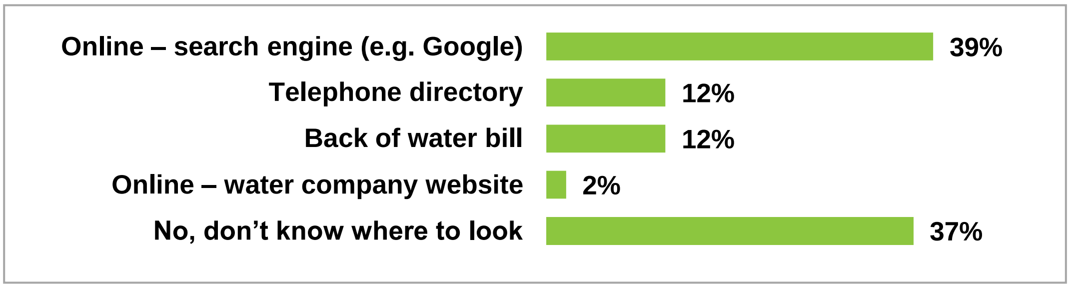
7.1.6 Customers aged 75+ years feel particularly strongly about representation through a customer body (78% compared to only 55% in the 18 - 34 age group).

7.1.7 Customers from a black and minority ethnic background (77%) are more likely to value representation than those from a white background (70%).

7.1.8 Around two thirds of customers would know where to look if they needed to get in touch with CCWater.

7.1.9 As in 2012, looking for the CCWater contact information online through a search engine such as Google is the most likely point of call. However, there is a sharp decrease in the proportion of customers who said this (51% in 2012; and 39% in 2013), bringing the proportion on par with responses in 2011 (37%).

Figure 73: Where to look for CCWater contact details
Q57. If you wanted to get in touch with Consumer Council for Water, do you know where to look for their contact details?



Base: All respondents: 5805

7.1.10 Customers in the Thames region are more likely to be reliant on search engines if they want to get in touch.

7.1.11 Older customers, particularly those aged 75+ need better signposting for getting in touch (48% do not know where to look vs. 26% of customers aged 18-34).

8. Cluster Analysis

8.1.1 This year for the first time, cluster analysis was carried out on the results. Cluster analysis uses statistical techniques to segment customers into different groups depending on how they responded to specific questions. Four different scores were included in the cluster analysis: a composite score for value for money for both water and sewerage; a composite score for overall satisfaction with water services and sewerage services; a composite score on affordability, and a composite score on perceptions of fairness.

Figure 74: Cluster Analysis – Scores on four composite measures for each cluster and total size of each cluster.

	Cluster 1	Cluster 2	Cluster 3	Cluster 4
% of total sample	46%	24%	16%	14%
Index VFM [4] Water and sewerage	0.70	0.36	-0.23	0.00
Index Overall Satisfaction Water and sewerage[5]	0.79	0.58	0.38	0.53
Affordability[6]	0.67	0.07	-0.68	0.48
Fairness[7]	0.61	0.13	-0.72	-0.41

8.1.2 Four different clusters were identified:

- Cluster 1 (which we have named Happy): This cluster is very satisfied with value for money, services, affordability and fairness. This cluster is the largest and makes up 46% of the population of consumers.
- Cluster 2 (which we have named Lukewarm): Neutral to satisfied with value for money, services, affordability and fairness. This cluster is the second largest and makes up a relatively modest 24% of the population of consumers.

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[4] This was calculated by statistically combining the questions: “Thinking first about value for money, how satisfied or dissatisfied are you with the value for money of the water services in your area?” and “How satisfied or dissatisfied are you with the value for money of the sewerage services in your area?”

[5] This was calculated by statistically combining the questions: “Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your water supply?” and “Taking all those aspects into account, overall how satisfied or dissatisfied are you with your sewerage service?”

[6] Based on: “How much do you agree or disagree that the <water/ water and sewerage> charges that you pay for are affordable to you?”

[7] Based on: “How much do you agree or disagree that the <water/ water and sewerage> charges that you pay are fair?”

- Cluster 3 (which we have named Concerned): This cluster is dissatisfied with value for money, affordability and fairness, but have a range of views on service from satisfied to dissatisfied. This cluster makes up 16% of the population of consumers.
- Cluster 4 (which we have named Unfair): Neutral/satisfied with service and affordability, neutral on value for money but feel their charges are unfair. This cluster is the smallest and makes up 14% of the population of consumers.

8.1.3 Each of these clusters has a unique profile which is illustrated in the pen portraits presented in Figure 75. The pen portrait is based on demographics and answers to other questions in the survey.

Figure 75: Pen portraits of the four clusters

8.1.4 The different cluster types throw some light on the different ways that customer respond to the survey questions, and may be worth further exploration.

9. Conclusions

- Overall satisfaction with water services has remained fairly constant. This year sees a small rise in satisfaction (93% in 2013; and 90% in 2012). Overall satisfaction with sewerage services has remained fairly constant. This year sees a small rise in satisfaction after three years of decline (87%).
- Satisfaction with value for money of water services continues to decrease (69%, down from 71% in 2012) and now stands at the level last seen in 2009. Satisfaction with value for money of sewerage services has been relatively constant over the last three years (71% in 2013; 70% in 2012; and 70% in 2011).
- In keeping with the trend from previous years, customers in the South West (where water and sewerage bills are historically highest) are more dissatisfied with value for money of water services (35%) than all other regions. However, their levels of satisfaction have remained constant over 2012 and 2013 at 52%. Customers in the South West are also least satisfied with the value for money of sewerage services (54% in 2013; and 50% in 2012). Although the South West is still the least satisfied region, satisfaction with value for money of sewerage has again increased in 2013, although not by the margin it did in previous years (50% in 2012; to 39% in 2011).
- Fewer than six out of 10 (54%) customers agree that their water and sewerage charges are fair. Perceptions of fairness continue to decline and 2013 sees the lowest score since the survey began in 2008.
- This year for the first time affordability was calculated for all customers as well as separately for WaSC and WoC customers. Overall, 67% of all customers say the water and sewerage charges they pay are affordable (20% say charges are unaffordable).
- Across WaSC customers there has been a decline in perceptions of affordability year on year to 66% from 74% in 2011, and a comparable increase in those disagreeing it is affordable to 21% this year compared to 12% in 2011.
- Compared to 2012 there has been a sharp increase in the proportion of customers disagreeing that their charges are affordable: amongst WaSC customers this has increased significantly to 21% from 13% and amongst WoC customers this has increased to 18% from 11%.
- Awareness of the WaterSure tariff has fallen to more typical levels after the ‘high’ seen last year (9% in 2013; and 12% in 2012). The proportion of customers who would like to know more about the WaterSure tariff has remained constant from last year (12% in 2013; and 11% in 2012).
- Awareness of water companies’ services for the elderly and disabled has been rising strongly over the past three years from 20% in 2011 to 31% in 2013. However, uptake remains static at 1-2%. Similar to the last two years results, 8% would like to know more about these services.
- Customers’ awareness of the Guaranteed Service Standards compensation scheme remains virtually unchanged from last year (43% in 2013; and 44% in 2012).

- The proportion of customers who say they would be likely to contact their water/ sewerage company if worried about paying their bill has fallen year on year from 80% in 2010 to 67% in 2013. Similarly, 66% of those who disagree their charges are affordable would be likely to contact their company if worried about paying their bill.
- Half of customers indicate that they have water meters (49%). This is an increase from 2012 (46%) and 2011 (36%). In Wales 51% of customers are reported to have water meters, and in England this is the case for 49% of customers.
- Many more metered customers (72%) than non-metered (59%) made a conscious decision to save water. The main motivation to save water amongst metered customer is financial (41%).
- There is confusion among customers about which items can be disposed of down a toilet, sink or drain. Only 43% this year, compared to 60% in 2012 correctly identified that none of a list of items should be disposed of in this way.
- Customers are still unclear about who is responsible for maintaining sewerage pipes and drains that run within their property's boundaries. Whilst there is a fall in the proportion of customers who incorrectly think they are responsible for sewers and drains in company ownership (33% compared to 42% in 2012), this is not matched by an increase in those who correctly identify the sewerage company as responsible (28% compared to 30% in 2012). Instead there is a corresponding increase in the proportion who 'don't know' who is responsible. This has increased to 21% from 12% in 2012.
- Customers were asked 'Sometimes companies perform better than expected and therefore make more profit. If this happens, which of the following would you prefer them to do?' and given a number of options for response. The most popular choice was 'spend more on improving services that customers think are important rather than using customer bills to finance improvements' (50%), followed by 'provide more financial help to customers on low incomes' (42%) and 'provide a one-off rebate to all customers' (32%).
- There are a small number of statistically significant differences between England and Wales:
    - Where previously satisfaction with value for money for water services in England and Wales has been similar (70% and 74% respectively in 2012), this gap has widened slightly in 2013 with customers in Wales being even more satisfied (78%) than customers in England (69%).
    - Customers in Wales report higher levels of satisfaction with value for money for sewerage services than those in England. In Wales, 79% were satisfied, as opposed to 70% in England.
    - Customers in Wales are significantly more likely to regard their water and/or sewerage charges as fair (59%) compared to England (54%).
    - Customers' trust in their water/sewerage company is higher in Wales. Using a ten point scale customers in Wales scored 7.6 compared to 7.3 in England.
    - Satisfaction with water hardness/softness was higher in Wales (90%) than in England (66%).

- Satisfaction with reducing smells from sewerage works was higher in Wales (70%) than in England (70%).
- Customers in Wales (47%) were also more supportive of the option to use profits gained from water companies doing better than expected to provide financial help to those on low incomes than customers in England (41%).

- Key driver analysis was conducted across services measures:
  - Value for money of water services: Aspects of water quality are positively linked to perceptions of value for money for water, but they are a weak driver as they only explain 9% of the range in responses. Water pressure and colour and appearance of tap water are the most important of the aspects measured.
  - Value for money for sewerage services: Aspects of sewerage quality, especially the maintenance of sewerage pipes and minimising sewer flooding, are considered to be the most important things that influence customers' perceptions of value for money for sewerage. However, all of the aspects of sewerage quality only explain 13% of the variance, which means that they are weak drivers.
  - Satisfaction with contact: Aspects of customer handling are very strong drivers of satisfaction with contact – it explains 78% of the variance. Ease of contact and being kept informed of progress with your enquiry/complaint/claim are the most important aspects measured.
  - Satisfaction with water supply: Aspects of water quality are positively linked to perceptions of satisfaction with water and explain 42% of the variance, which is a moderate driver. Water pressure is the most important driver of satisfaction with water supply.
  - Satisfaction with sewerage services: Aspects of sewerage quality are positively linked to perceptions of satisfaction with sewerage and explain 40% of the variance, which is a moderate driver. Minimising sewer flooding and maintenance of sewerage pipes are the most important aspects measured.
- The Cluster Analysis revealed four distinct segments of customers based on their responses to four composite questions concerning their views about satisfaction with water and sewerage services, satisfaction with value for money of water and sewerage services, affordability and fairness of charges. The largest cluster accounts for almost half of all customers and has high scores on all these areas. The second largest cluster has moderate scores in these areas and accounts for an additional quarter of customers. The remaining two clusters show negative responses to some of the questions.
- The two negative clusters are of particular interest: Cluster 3 which makes up 16% of consumers has moderate to low levels of satisfaction with water and sewerage services and negative scores on value for money, affordability and fairness. Cluster 4 which makes up 14% of consumers has neutral value for money scores, moderate satisfaction with water and sewerage services and affordability and negative fairness. The pen portrait reveals that those within this group are more

likely than average to be from higher social groups and have high levels of internet use.

10. Appendix 1 - Questionnaire

CCWater

2013 Questionnaire

V8-FINAL

Prepared for: CCWater
Ref: Jn 1576 RM
Date: September 2013

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Introduction

Good morning/afternoon, my name is …………………….. I am calling from SPA Future Thinking, an independent research company and we are carrying out a survey about water and sewerage services on behalf of the Consumer Council for Water. The Consumer Council for Water is the independent body which represents consumers of the water industry in England and Wales. Could you spare some time to answer some questions?

READ OUT IF NECESSARY
Survey Details
The survey should take around 20 minutes and is intended to help ensure that you get a good service from your water and/or sewerage company. We would like you to give your honest opinions as this is completely confidential and we can assure you that our discussion will be undertaken under strict market research codes of conduct.

CCWater Background
The Consumer Council for Water provides a national voice for water and sewerage consumers. They want consumers to receive high standards and good value for money in water and sewerage services, comparing well with the best of other service areas.

Willing to take part	**1**	**Continue**
Not willing to take part	**2**	**Thank & close**

Screener Questions

Firstly I would like to ask you some questions to ensure that you are eligible to take part in the survey: **Q1. Are you the water bill payer in your household?** *INTERVIEWER INSTRUCTION: If respondent says that they pay their water bill as part of rent code as 2.* **SINGLE CODE**		
Yes	1	Q2
No	2	Q1a
Don't know	99	
ASK IF NO/DON'T KNOW AT Q1. OTHERS GO TO Q2 **Q1a. Is there somebody else in the household who is the bill payer? SINGLE CODE**		
Yes	1	RETURN TO INTRO
No	2	CLOSE
Don't know	99	
Q2. And which of the following applies to the way you pay your bills… READ OUT		
Sole bill payer	1	
You share payment of the bill with spouse/partner	2	
You share payment of the bill as part of shared house	3	
Other (specify)	4	
Don't know	99	
Q3 Do you or any member of your family work in….: READ OUT		
The water industry i.e. work for a water company	1	Thank and close
A consumer organisation e.g. Consumer Futures or Consumer Direct	2	
Which?, Citizens Advice Bureau	3	
Market Research	4	
None of the above	5	Q4a

Q4a Who is your water company? (This may be a company which deals with your sewerage too.) SINGLE CODE		
Anglian Water Services Ltd	1	Q4c
Dŵr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Water only companies		
Sembcorp Bournemouth Water Plc	11	Q4d
Bristol Water Plc	12	
Cambridge Water Company Plc	13	
Cholderton & District Water Company Ltd	14	CLOSE
Dee Valley Water Plc	15	Q4d
Essex & Suffolk Water	16	
Affinity Water SouthEast (formerly Veolia Water Southeast and Folkestone & Dover Water Services)	17	
Hartlepool Water Plc	18	
Portsmouth Water Plc	19	
South East Water Plc (including Mid Kent Water Plc)	20	
South Staffordshire Water Plc	21	
Sutton & East Surrey Water Plc	22	
Affinity Water East (formerly Veolia Water East Ltd and Tendring Hundred Water Services)	23	
Affinity Water Central (formerly Veolia Water Central and Three Valleys Water)	24	
Don't know	99	Go to Q4bi

ASK IF DON'T KNOW AT Q4A OTHERS GO TO FILTER AT Q4C **Q4bi Is your postcode <*insert from sample*>?**		
Yes, same as sample	1	
Incorrect – Enter correct postcode (first part and first digit of second part)	2	

IF CODE 2 AT Q4bi POSTCODE LOOKUP WILL BE IMPLEMENTED AND WATER COMPANY WILL APPEAR. IF POSTCODE NOT FOUND, ENTER DON'T KNOW AND SAMPLE WILL AUTO INSERT WATER COMPANY FOR THAT AREA FROM SAMPLE DATABASE		
ASK IF DON'T KNOW AT Q4A OTHERS GO TO FILTER AT Q4C **Q4bii In your area, your water company is likely to be** *[insert name of water company].* ***Does that sound right*****?**		
Yes	1	GO BACK AND CODE Q4A THEN TO FILTER AT Q4c
No	2	CLOSE
ASK IF CODES 1-10 AT Q4A. OTHERS GO TO FILTER AT Q4d **Q4c And do they also provide your sewerage services, or do you have a septic tank?**		
Provide sewerage services	1	GO TO FILTER AT Q5a
Have septic tank	2	
Different company provides my sewerage services	3	CLOSE
Don't know	99	FILTER AT Q5a
ASK IF CODES 11-24 AT Q4a. OTHERS GO TO FILTER AT Q5a **Q4d Do you have a septic tank?**		
Yes	1	FILTER AT Q5a
No	2	Q4di
ASK IF CODE 2 AT Q4d. OTHERS GO TO FILTER AT Q5a **Q4di Were you aware that your sewerage services are provided by another company?**		
Yes	1	Q4e
No	2	Q4fi
ASK IF CODE 1 AT Q4di. OTHERS GO TO FILTER AT Q4fi **Q4e And who is your sewerage company?** ADD IF NECESSARY: **the bill from your water company will also say who provides your sewerage services.** **SINGLE CODE**		
Anglian Water Services Ltd	1	FILTER AT Q5a
Dŵr Cymru Cyfyngedig (Welsh Water)	2	
Northumbrian Water Ltd	3	
Severn Trent Water Ltd	4	
South West Water Ltd	5	
Southern Water Services Ltd	6	
Thames Water Utilities Ltd	7	
United Utilities Water Plc (North West Water)	8	
Wessex Water Services Ltd	9	
Yorkshire Water Services Ltd	10	
Don't know	99	Postcode lookup Q

		Q4fi
IF NO AT Q4di OR DON'T KNOW (CODE 99) AT Q4e, REFER TO SAMPLE AND ASK: **Q4fi Is your postcode <*insert postcode from sample*>?**		
Yes, same as sample	1	
Incorrect – Enter correct postcode (first part and first digit of second part)	2	
Q4fii In your area, your sewerage company is likely to be [insert name of water company]. **Does that sound right?**		
Yes	1	GO BACK AND CODE Q4e THEN TO FILTER AT Q5a
No	2	CLOSE

Company Information

DROP Qs 5-6 UNTIL 2014 FOR ALL COMPANIES APART FROM SOUTHERN, SOUTH EAST WATER AND AFFFINITY SE		
ASK SOUTHERN CUSTOMERS (CODED 6 AT Q4A) AND CODED 1 OR 99 AT Q4c ASK SOUTH EAST CUSTOMERS (CODED 20 AT Q4A) AND CODED 2 AT Q4d OTHERS GO TO FILTER AT Q5b **Q5a How much do you agree or disagree that your water and sewerage bill makes it clear how much needs to be paid and when? SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
ASK SOUTHERN CUSTOMERS (CODED 6 AT Q4A) AND CODED 2 AT Q4c ASK SOUTH EAST CUSTOMERS (CODED 20 AT Q4a) AND CODED 1 AT Q4d ASK ALL AFFINITY SE CUSTOMERS (CODED 17 AT Q4A). OTHERS GO TO FILTER AT Q6a **Q5b How much do you agree or disagree that your water bill makes it clear how much needs to be paid and when?** SINGLE CODE		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
ASK ONLY AFFINITY SE CUSTOMERS (CODED 17 AT Q4A) AND CODED 2 AT Q4D. OTHERS GO TO FILTER AT Q6a **Q5c How much do you agree or disagree that your sewerage bill makes it clear how much needs to be paid and when?** SINGLE CODE		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	

ASK SOUTHERN CUSTOMERS (CODED 6 AT Q4A) AND CODED 1 OR 99 AT Q4c ASK SOUTH EAST CUSTOMERS (CODED 20 AT Q4A) AND CODED 1 OR 99 AT Q4c OTHERS GO TO FILTER AT Q6b **Q6a And do you agree or disagree that it is clear how the final amount of your bill was reached? SINGLE CODE** Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 99	
ASK SOUTHERN CUSTOMERS (CODED 6 AT Q4A) AND CODED 2 AT Q4c ASK SOUTH EAST CUSTOMERS (CODED 20 AT Q4a) AND CODED 2 AT Q4c ASK ALL AFFINITY SE CUSTOMERS (CODED 17 AT Q4A). OTHERS GO TO FILTER AT Q7 **Q6b And do you agree or disagree that it is clear how the final amount of your water bill was reached? SINGLE CODE** Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 99	
ASK ONLY AFFINITY SE CUSTOMERS (CODED 17 AT Q4A) AND CODED 2 AT Q4D. OTHERS GO TO FILTER AT Q7 **Q6c And do you agree or disagree that it is clear how the final amount of your sewerage bill was reached?** SINGLE CODE Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	 1 2 3 4 5 99	

ASK ALL **Q7 Thinking first about value for money, how satisfied or dissatisfied are you with the <u>value for money</u> of the <u>water services</u> in your area? SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
DO NOT ASK IF CODE 2 AT Q4C OR 1 AT Q4D (SEPTIC TANK) **Q8 How satisfied or dissatisfied are you with the <u>value for money</u> of the <u>sewerage services</u> in your area? SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
ASK ALL **Q9 We would like to ask you a couple of questions about your gas and electricity suppliers. Does the same company provide your gas and electricity? SINGLE CODE ONLY**		
Yes, both gas and electricity	1	
No – gas and electricity from separate companies	2	
Don't have mains gas	3	
Don't know	99	
ASK ALL **Q10 Which of the following describes your phone and internet provision at home? SINGLE CODE ONLY**		
My landline and broadband (internet) are provided by the same company	1	
My landline and broadband (internet) are provided by different companies	2	
I don't have a landline	3	
I don't have broadband (internet access)	4	
I have neither landline nor broadband (internet access	5	

Q11Thinking about such other household utility services, how satisfied or dissatisfied are you with the <u>value for money</u> from services such as…?: READ OUT EACH SERVICE & SINGLE CODE *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 99= don't know 98= not applicable.* a) Your energy supplier (gas and electricity) **ASK IF CODE 1 AT Q9** b) Your gas supplier **ASK IF CODE 2 AT Q9** c) Your electricity supplier **ASK IF CODE 2 OR 3 AT Q9** d) Your communications supplier (who provides your telephone landline and broadband services) **ASK IF CODE 1 AT Q10** e) Your telephone landline supplier **ASK IF CODE 2 OR 4 AT Q10** f) Council services **ASK ALL** g) Your home broadband provider **ASK IF CODE 2 OR 3 AT Q10**		
ASK IF CODED 1 OR 2 AT Q11: a, b OR c AND CODED 3, 4, 5 AT Q7 AND Q8 (Q7 ONLY IF SEPTIC TANK) **Q12a Why do you say that you are more satisfied with the value for money from your energy supplier than from your water and/or sewerage company? DO NOT READ OUT. MULTICODE OK**		
Cheaper/better value	1	
Able to switch/not a monopoly	2	
Better service	3	
No complaints/problems	4	
Fixed rate from energy supplier	5	
More information/communication	6	
Other (please specify)	7	
Don't know	99	
ASK IF CODED 1 OR 2 AT Q11: d, e OR g AND CODED, 3, 4, 5 AT Q7 OR Q8 (Q7 ONLY IF SEPTIC TANK) **Q12b Why do you say that you are more satisfied with the value for money from your communications service provider than from your water and/or sewerage company? TYPE IN**		

ASK ALL **Q13 How much do you agree or disagree that the** [CODE 2 AT Q4C OR 1 AT Q4D = '**water'] /**[ALL OTHERS = **water and sewerage] charges that you pay are fair? SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
QUESTION SUSPENDED 2013		
ASK IF DISAGREE (CODES 4-5) AT Q13. OTHERS GO TO FILTER AT Q15a **Q Why do you think that the** [CODE 2 AT Q4C OR 1 AT Q4D = '**water'] /**[ALL OTHERS = **water and sewerage] charges that you pay are unfair? DO NOT READ OUT. MULTICODE**		
Expensive/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Profits/shareholders paid too much	3	
Poor/inefficient service	4	
Poor water quality	5	
Prices vary by region/prices should be the same everywhere	6	
Had to go on a meter/no choice in having a meter	7	
Other (specify)	8	
Don't know	99	
ASK ALL CODED 1-10 AT Q4A (WaSCs) **Q15a How much do you agree or disagree that the** [CODE 2 AT Q4C OR 1 AT Q4D **= 'water']** /[ALL OTHERS **= 'water and sewerage'] charges that you pay for are affordable to you? SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	

ASK ALL CODED 11-24 AT Q4A (WOCs) **Q15b How much do you agree or disagree that the water charges that you pay for are affordable to you? SINGLE CODE**		
Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	1 2 3 4 5 99	
ASK ALL CODED 11-24 AT Q4A AND Q4D = 2 (WOCs) **Q15c How much do you agree or disagree that the sewerage charges that you pay for are affordable to you? SINGLE CODE**		
Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	1 2 3 4 5 99	
NEW QUESTION Q15d		
ASK ALL CODED 11-24 AT Q4A AND Q4D = 2 (WOCs) **Q15d How much do you agree or disagree that the total water and sewerage charges that you pay for are affordable to you? SINGLE CODE**		
Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know	1 2 3 4 5 99	
Q48a moved to vfm section in 2013 but suspended		
Q Thinking about your water and/or sewerage services, how much is your [CODE 2 AT Q4C OR 1 AT Q4D = **'water'] /**[ALL OTHERS = **water and sewerage] bill? You can say how much you pay per week, a month, a quarter, half a year or a year, whichever is easiest for you. If you're not sure, please give your best estimate. TYPE IN**		
£ per week £ per month £ per quarter £ per six months £ per year Don't know	1 2 3 4 5 99	

ASK ALL SOUTH WEST WATER CUSTOMERS (CODE 5 AT Q4A). OTHERS GO TO Q17 **Q16a How well do you feel you understand the following…?** **Scale: Very well, fairly well, not very well, not at all well** a) the process behind supplying, removing and treating water to and from your property? b) the costs involved in the process of supplying, removing and treating water to and from your property?		
ASK ALL SOUTH WEST WATER CUSTOMERS (CODE 5 AT Q4A). OTHERS GO TO Q17 **Q16b To what extent do you think more information on the company and more education on the process would affect your perceptions of value for money?** A great deal A fair amount Not very much Not at all	 1 2 3 4	
NEW QUESTION Q16c IN 2013		
ASK ALL SOUTH WEST WATER CUSTOMERS (CODE 5 AT Q4a OR Q4e) **From April 2013, the Government introduced an annual contribution of £50 towards water and sewerage bills for customers of South West Water** **Q16c Before this interview, were you aware of this Government contribution to your bill? SINGLE CODE** Yes No	 1 2	

Section B: Consumer Rights and Responsibility

ASK ALL **Q17 How likely would you be to contact your water and/or sewerage company if you were worried about paying your bill? READ OUT**		
Very likely	1	
Fairly likely	2	
Not very likely	3	
Not at all likely	4	
Don't know	99	
ASK ALL **Q18a Does your household have a water meter? SINGLE CODE**		
Yes	1	Q18b
No	2	Q19
Don't know	99	Q19
ASK IF WATER METER (CODE 1 AT Q18a). OTHERS GO TO Q19 **Q18b Which of the following apply to you? SINGLE CODE**		
Your property already had meter when moved in	1	
You asked for a meter to be fitted	2	
You had to have a meter fitted	3	
Other (specify)	4	
Don't know	99	
ASK ALL EXCEPT AFFINITY SE AND SOUTHERN WATER (CODES 17, 6 AT Q4a) AND SOUTH EAST WATER – SAMPLE 2 (CODE 20 AT Q4A AND FLAGGED SAMPLE 2 IN SAMPLE FILE) **Q19 Were you aware that …: SINGLE CODE FOR EACH STATEMENT** **Scale: 1=Yes, 2= No, 99= Don't know**		
a) When requested, water meters are fitted free of charge		
b) If you ask for a meter to be fitted , you have 12 months to decide whether or not you like it. If you decide you don't like it, you can go back to a water rate charge for your property. There are no extra charges made for trialling this service**.**		
INTERVIEWER NOTE: If asked, the water meter itself stays within the property. Also, if you move into a property that is charged for water via a meter you cannot go back to a water rate charge.		

NEW QUESTIONS Q20a/b IN 2013		
ASK ALL EXCEPT AFFINITY SE AND SOUTHERN WATER (CODES 17, 6 AT Q4a) AND SOUTH EAST WATER – SAMPLE 2 (CODE 20 AT Q4A AND FLAGGED SAMPLE 2 IN SAMPLE FILE) ASK ALL EXCEPT THOSE SAYING 1 AT Q18a **Q20a If you found you could reduce your bill by having a meter fitted, would you apply for a free meter under this 12 month trial scheme? SINGLE CODE**		
Yes	1	
No	2	
ASK ALL SAYING NO (CODE 2 AT Q20A). OTHERS GO TO Q21a **Q20b Why not? TYPE IN**		
ASK ALL **Q21a Are you aware of or are you currently on** [CODE 2 AT Q4a = '**Welsh Water Assist'/**ALL OTHERS = **'WaterSure'] tariff >? This was introduced to help people in low income groups who need to use a lot of water READ OUT. SINGLE CODE**		
Yes, have heard of it but do not need it	1	GO TO
Yes, have subscribed t o it	2	Q21b
No, but would like to know more	3	Q22
No, but do not need it	4	GO TO
Don't know	99	Q21b
ASK IF CODE 3 AT Q21a. OTHERS GO TO Q22 **Q21b Would you like me to give you the telephone number of your water company at the end of the interview? SINGLE CODE**		
Yes	1	
No	2	

NEW QUESTIONS Q22-24 IN 2013		
ASK ALL, BRING IN RELEVANT CODES AS INDICATED **Q22 Are you aware of any <u>other</u> schemes operated by your water/sewerage company which provide lower charges for customers who struggle to afford their bills?** IF YES, **What are they? DO NOT READ OUT. MULTICODE OK** < BRING IN CODES ACCORDING TO WATER/SEWERAGE COMPANY SELECTED AT Q4A/Q4E, CODES SHOWN BELOW>		
Yes:		
<*Q4A/Q4E = 1'Anglian'* >*:* AquaCare Plus	1	
< *Q4A/Q4E = 1'Anglian'* >*:* Anglian Assistance Fund	2	
<*Q4A/Q4E* = 4 '*Severn Trent Water'*>: Big Difference Fund	3	
< Q4A/*Q4E* = 5 '*South West Water'* >: Fresh Start	4	
< *Q4A/Q4E* = 5 '*South West Water'* >: South West WaterCare Tariff	5	
< *Q4A/Q4E* = 9 '*Wessex Water* '>: Wessex Water Assist Tariff	6	
< *Q4A/Q4E* = 10 '*Yorkshire Water Services Ltd*>: Resolve	7	
<Q4A/Q4E = 12 '*Bristol Water'*>: Bristol Water Assist Tariff	8	
<*Q4A/Q4E = 6 OR 8*>*:* Support Tariff	9	
<*Q4A/Q4E = 6 OR 13*>*:* New Start	10	
<*Q4A/Q4E = 5 OR 12*>*:* Restart	11	
<*Q4A/Q4E = 10 OR 20*>*:* Helping Hands	12	
< *ALL*> Arrears Allowance Scheme	13	
< *ALL*> Assistance Fund	14	
<*ALL*> Can't remember name: A Charitable Trust/Trust Fund	15	
<*ALL*> Can't remember name: A Social Tariff	16	
No, not aware of any	17	
ASK THAMES WATER CUSTOMERS ONLY (CODED 7 AT Q4a) **Q23 Are you aware of the following services offered by Thames Water to help customers to pay their bills? READ OUT. MULTICODE OK**		
Payment plans	1	
Deductions directly from benefit payments	2	
Direct Debit	3	
By card online	4	
By phone	5	
By post	6	
At a bank	7	
At a PayPoint facility	8	
At a Post Office	9	
Not aware of any of these	99	

ASK ALL **Q24 Are you aware that if none of the rainwater that runs off a property drains into the public sewer (e.g. it may drain into a soakaway or the ground), a reduced sewerage bill is available? SINGLE CODE**		
Yes	1	
No	2	
ASK ALL **Q25a Are you aware of your water company's services for elderly and/or disabled customers? These might include services for sight impaired people such as large print or Braille leaflets and bills, passwords to ensure callers from the company are genuine, or customers on dialysis who need constant availability of supply. READ OUT. SINGLE CODE**		
Yes, have heard of it but do not need it	1	GO TO
Yes, have subscribed to it	2	Q26
No, but would like to know more	3	Q25b
No, but do not need it	4	GO TO
Don't know	99	Q26
ASK IF CODE 3 AT Q25a. OTHERS GO TO Q26 **Q25b Would you like me to give you the telephone number of your water company at the end of the interview? SINGLE CODE**		
Yes	1	
No	2	
ASK ALL **Q26 Were you aware that if your** [CODE 2 AT Q4C OR 1 AT Q4D = '**water'] /**[ALL OTHERS = **water and sewerage] company fails to meet certain customer service standards for reasons within their control you may be entitled to compensation? SINGLE CODE**		
Yes, was aware	1	
No, was not aware	2	
Don't know	99	
INTERVIEWER NOTE: If asked, information on service standards and the occasions when customers may be entitled to compensation can be obtained from your water company or their website		

ASK ALL **Q27a Who do you think is responsible for maintaining <u>the water pipes</u> within your property's boundaries? DO NOT PROMPT.SINGLE CODE**		
I am/the householder	1	
Landlord	2	
Organised through my insurance	3	
The local council	4	
The water company	5	
Other (please specify)	6	
Don't know	99	
INTERVIEWER NOTE: If asked, after responding, the correct answer is that the homeowner is responsible for the maintenance of water pipes at their home up to the boundary of their property (i.e. where their property meets the public highway)		
ASK ALL EXCEPT CODE 2 AT Q4C OR 1 AT Q4D **Q27b Who do you think is responsible for maintaining any <u>shared sewerage pipes</u> and drains that run within your property's boundaries? By <u>Shared sewerage pipes</u> we mean pipes serving more than one property. DO NOT PROMPT.SINGLE CODE**	1	
	2	
I am/the householder	3	
Landlord	4	
Organised through my insurance	5	
The local council	6	
The water/sewerage company	99	
Other (please specify)		
Don't know		
INTERVIEWER NOTE: If asked after responding, the correct answer is that the sewerage company is responsible for the maintenance of sewerage pipes and drains which serve more than one property, including those within your property boundary. **The homeowner is responsible for maintaining a sewer or drain when it serves their property only and is within the boundary of their property**		
Q28 Have you contacted your [CODE 2 AT Q4C OR 1 AT Q4D = '**water'] /**[ALL OTHERS = **water and/or sewerage] company in the past 12 months? SINGLE CODE**		
Yes – water and sewerage company	1	
Yes – water company	2	Q29
Yes – sewerage company	3	
No	4	Q32a
Don't know	99	

ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q32a **Q29 What was your most recent contact about? DO NOT READ OUT. MULTICODE OK**		
To make a complaint	1	
To make an enquiry relating to drought/water shortage	2	
To make an enquiry relating to flooding	3	
To make an enquiry about sewers and drains (transfer)	4	
Billing enquiry	5	
No supply/supply issue	6	
To report a leak	7	
To change to/ask for a water meter	8	
Water quality	9	
Water pressure	10	
Sewerage problem	11	
To enquire about programme to fit meters	12	
To enquire about hosepipe ban	13	
Other (please specify)	14	
Don't know	99	
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q32a **Q30a Thinking about this contact with** [CODE 1 OR 2 AT Q28 = '**insert code given at Q4a'] /**[CODE 3 AT Q28 AND CODE 11-24 AT Q4A = **insert code given at Q4e] /**[CODE 3 AT Q28 AND CODE 1-10 AT Q4A = **insert code given at Q4a], overall how satisfied were you with…. READ OUT EACH STATEMENT & SINGLE CODE** Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 99= don't know 98= not applicable.		
a) The ease of contacting someone who was able to help you b) The quality/ clarity of information provided c) The knowledge and professionalism of staff d) The feeling that your contact had been, or would be, resolved e) The way that the water company has kept you informed of progress with your enquiry/complaint/claim		

ASK IF WESSEX WATER CUSTOMER (CODE 9 AT Q4a). OTHERS GO TO FILTER AT Q31 **Q30b Taking everything into consideration, how much effort did it take you to resolve your query with Wessex Water? SINGLE CODE ONLY**		
A lot of effort	1	
Quite a lot of effort	2	
Not very much effort	3	
No effort at all	4	
ASK IF YES AT Q28 (CODES 1-3). OTHERS GO TO FILTER AT Q32a **Q31 Taking everything into account, overall how satisfied or dissatisfied were you with the contact with** [CODE 1 OR 2 AT Q28 = '**insert code given at Q4a'] /**[CODE 3 AT Q28 AND CODE 11-24 AT Q4A = **insert code given at Q4e] /**[CODE 3 AT Q28 AND CODE 1-10 AT Q4A = **insert code given at Q4a]? SINGLE CODE**	1	
Very satisfied	2	
Fairly satisfied	3	
Neither satisfied nor dissatisfied	4	
Fairly dissatisfied	5	
Very dissatisfied	99	
Don't know		
ASK IF CODE 1 NOT GIVEN AT Q29. OTHERS GO TO Q33 **Q32a In the last 12 months, do you think you had reason to complain about your water and/or sewerage services and didn't? SINGLE CODE**		
Yes	1	Q32b
No	2	Q33
ASK IF YES AT Q32a (CODE 1). OTHERS GO TO Q33 **Q32b What caused your dissatisfaction DO NOT READ OUT. MULTICODE OK**		
Billing error	1	
No supply/supply issue	2	
Leak on property	3	
Leak in public place	4	
Problem with water meter installation	5	
Problem with water meter calculation/incorrect meter reading	6	
Water quality	7	
Water pressure	8	
Sewerage problem	9	
Engineer appointment not kept	10	
Engineer work not satisfactory	11	
Company staff not helpful	12	
Other (please specify)	13	
Don't know	99	

ASK IF YES AT Q32a (CODE 1). OTHERS GO TO Q33 **Q32c Why didn't you contact your water and/or sewerage company? DO NOT READ OUT. MULTICODE OK**		
Problem resolved itself	1	
Didn't think they **could** help	2	
Didn't think they **would** help	3	
Didn't have the time to contact them	4	
Unsure how to make contact	5	
Had previous bad experience with their customer service	6	
Tried to contact but could not get through	7	
Other (please specify)	8	
May yet contact them	98	
Don't know	99	

Section C: Water on Tap

ASK ALL **Q33 How satisfied are you with the following aspects of your water supply: READ OUT EACH STATEMENT & SINGLE CODE** Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 99= don't know 98= not applicable.		
The colour and appearance of your tap water	1	
Taste and smell of tap water	2	
Hardness/softness of your water	3	
The safety of your drinking water	4	
The reliability of your water supply	5	
Your water pressure	6	
ASK ALL **Q34 Taking all those aspects of your water supply service into account, overall how satisfied or dissatisfied are you with your <u>water</u> supply? SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don't know	99	
ASK IF CODE 4 OR 5 AT Q34. OTHERS GO TO Q36 **Q35 Did any of the following influence your overall satisfaction? READ OUT. MULTICODE OK**		
The level of profits made	1	
My bill	2	
Personal experiences	3	
It's a privatised company	4	
Customer service	5	
Views about the water industry in general	6	
The water industry in general	7	
Media stories	8	
Word of mouth	9	
Other (SPECIFY)	10	
None of these	11	

QUESTIONS REMAIN OUT FOR 2013		
ASK ALL **Q Do you think your water supply service has got better, worse or stayed the same over the past year?** **READ OUT. SINGLE CODE**		
Much better	1	
Slightly better	2	
About the same	3	
Slightly worse	4	
Much worse	5	
Don’t know	99	
ASK ALL SAYING BETTER/WORSE (CODES 1-2; 4-5). **Q Why do you think the service has been <***insert from Q* better/worse **>? TYPE IN**		
Q How much do you agree or disagree that you usually drink tap water rather than still bottled water? READ OUT. SINGLE CODE		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don’t know	99	
Q When eating in cafés or restaurants, how likely are you to ask for tap water to be brought to your table instead of still bottled water? READ OUT. SINGLE CODE		
Very likely	1	
Quite likely	2	
Neither likely nor unlikely	3	
Unlikely	4	
Very unlikely	5	
Do not ask for any kind of water	6	
ASK IF VERY SATISFIED WITH TASTE/SMELL OF TAP WATER (CODE 1 AT Q:STATEMENT 2) AND NOT ASKING FOR WATER CODES 4-6 AT Q. **Q Why do you not ask for tap water in restaurants? TYPE IN**		

ASK ALL **Q36 Have you made a conscious decision to use less water in the last three years?** ASK IF YES**, Why? DO NOT READ OUT. SINGLE CODE**		
Yes:		
Financial savings	1	
Environmental reasons/want to conserve water	2	
Information from water company about saving water	3	
Information from elsewhere about saving water	4	Q37a
Habit/common sense	5	
Seems like the right thing to do	6	
Other (specify)	7	
No	8	Q39a
Don't know	99	
ASK IF YES AT Q36 (CODES 1-7). OTHERS GO TO Q39a **Q37a What actions have you and your household taken to reduce your use of water? DO NOT READ OUT. MULTICODE OK**		
Having a water meter installed	1	
Taking showers instead of baths	2	
Water efficient shower/shower-head	3	
Energy & Water efficient dishwasher	4	
Energy & Water efficient washing machine	5	
Trigger device fitted to hosepipe	6	
Hippo/Save A Flush device in toilet cistern	7	
Lag pipes to protect against bursting	8	
Water butts in garden	9	
Turn off tap when brushing teeth	10	
Wait until full load for Washing Machine / dishwasher	11	
Only put required amount in kettle	12	
Reusing water e.g. bath water	13	
Share shower/bath	14	
Spending less time in shower	15	
Other (specify)	16	
Nothing	17	
Don't know	99	
ASK IF PERCEIVED SHOWER SAVINGS AT Q37 (CODES 2, 3, 14, 15). OTHERS GO TO FILTER AT Q38 **Q37b Do you use a power shower? SINGLE CODE ONLY**		
Yes	1	
No	2	
Don't know	99	

Q SUSPENDED FOR 2013		
ASK ALL **Qa What additional things, if any, would you be willing to do to save water? READ OUT. MULTICODE OK** <SCRIPT NOTE: do not show those mentioned at Q37a>		
Having a water meter installed	1	
Taking showers instead of baths	2	
Water efficient shower/shower-head	3	
Energy & Water efficient dishwasher	4	
Energy & Water efficient washing machine	5	
Trigger device fitted to hosepipe	6	
Hippo/Save A Flush device in toilet cistern	7	
Lag pipes to protect against bursting	8	
Water butts in garden	9	
Turn off tap when brushing teeth	10	
Wait until full load for Washing Machine / dishwasher	11	
Only put required amount in kettle	12	
Reusing water e.g. bath water	13	
Share shower/bath	14	
Spending less time in shower	15	
Other (specify)	16	
None of these	17	
Don't know	99	
ASK IF PERCEIVED SHOWER SAVINGS AT Q (CODES 2, 3, 14, 15). **Qb Do you use a power shower? SINGLE CODE ONLY**		
Yes	1	
No	2	
Don't know	99	

ASK IF YES AT Q36 (CODES 1-7). OTHERS GO TO Q39a **Q38 How did you find out how to reduce your use of water? MULTICODE OK. DO NOT READ OUT BUT PROMPT IF NECESSARY**		
Actively searched for information on water company website	1	
Actively searched for information on CCWater website	2	
Actively searched for information on WaterWise	3	
Actively searched for information on other websites	4	
Actively searched for information elsewhere (specify)	5	
Come across information online (specify)	6	
Come across information with water bill	7	
Come across information in local/national press	8	
Come across information in other literature	9	
Seen something on TV	10	
Heard on radio	11	
Common sense	12	
Family/friends	13	
Other (please specify)	14	
Don't know how to save money	15	
Qs SUSPENDED FOR 2013		
ASK ALL **Q How have you been made aware, if at all, of any campaigns to use water wisely in the past 12 months? READ OUT. MULTICODE OK.**		
Television	1	
Billboards	2	
Radio	3	
Leaflets	4	
Mail from water companies	5	
Newspapers/magazines	6	
Children doing it at school	7	
Online	8	
Information on bills	9	
Other (please specify)	10	
Not aware of any campaigns to use water wisely	11	
Don't know	99	
Q In the last 12 months, has there been a hosepipe ban where you live? SINGLE CODE ONLY		
Yes	1	
No	2	
Don't know	99	

ASK ALL **Q39a Have you received or come across any information in the last 12 months on how to avoid your water pipes freezing? SINGLE CODE ONLY**		
Yes	1	
No	2	
Don't know	99	
ASK ALL **Q39b Has your household taken any measures to avoid having frozen water pipes this winter? SINGLE CODE ONLY**		
Yes	1	
No	2	
Don't know	99	

Section D: Keeping it Clean

ASK ALL **Q40 Which of the following do you think are ok to dispose of down the toilet, sink or drain? READ OUT. MULTICODE**		
Fats/cooking oils	1	
Nappies	2	
Sanitary towels	3	
Tampons	4	
Razors	5	
Cotton buds	6	
Condoms	7	
Motor oil	8	
Medicines	9	
Wet wipes	10	
Tissues (e.g. kleenex)	11	
Baby wipes	12	
None of these – **DO NOT READ OUT**	13	
Don’t know – **DO NOT READ OUT**	99	
INTERVIEWER NOTE: If asked after response has been given, none of these is ok		
DO NOT ASK IF CODE 2 AT Q4C OR 1 AT Q4D (SEPTIC TANK) **Q41 How satisfied are you with your sewerage company’s management of the following aspects of their service….: READ OUT EACH STATEMENT AND SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4= Fairly dissatisfied, 5= very dissatisfied, 99 = don’t know 98 = not applicable.* a) Reducing smells from sewage treatment works b) Maintenance of sewerage pipes and treatment works c) Cleaning waste water properly before releasing it back into the environment d) Minimising sewer flooding		
DO NOT ASK IF CODE 2 AT Q4C OR 1 AT Q4D (SEPTIC TANK) **Q42a Taking all those aspects into account, overall how satisfied or dissatisfied are you with your <u>sewerage</u> service? SINGLE CODE**		
Very satisfied	1	
Fairly satisfied	2	
Neither satisfied nor dissatisfied	3	
Fairly dissatisfied	4	
Very dissatisfied	5	
Don’t know	99	

ASK IF CODE 4 OR 5 AT Q42a. OTHERS GO TO Q43 **Q42b Did any of the following influence your overall satisfaction? READ OUT. MULTICODE OK**		
The level of profits made	1	
My bill	2	
Personal experiences	3	
It's a privatised company	4	
Customer service	5	
Views about the water industry in general	6	
The water industry in general	7	
Media stories	8	
Word of mouth	9	
Other (SPECIFY)	10	
None of these	11	
QUESTIONS SUSPENDED FOR 2013		
DO NOT ASK IF CODE 2 AT Q4C OR 1 AT Q4D (SEPTIC TANK) **Q Do you think your sewerage service has got better, worse or stayed the same over the past year? READ OUT. SINGLE CODE**		
Much better		
Slightly better	1	
About the same	2	
Slightly worse	3	
Much worse	4	
Don't know	5	
	99	
ASK ALL SAYING BETTER/WORSE (CODES 1-2; 4-5). **Q Why do you say that? TYPE IN**		
ASK EACH STATEMENT FOR CERTAIN RESPONDENTS ONLY **Q43Similarly, thinking about your overall satisfaction with the services you receive from other household service providers, how satisfied or dissatisfied are you with the service you receive from your …?: READ OUT EACH SERVICE & SINGLE CODE** *Scale: 1= very satisfied, 2= Fairly satisfied, 3= Neither satisfied nor dissatisfied, 4=Fairly dissatisfied, 5= very dissatisfied, 99= don't know 98= not applicable.*		
a) Your energy supplier (gas and electricity) **ASK IF CODE 1 AT Q9**		
b) Your gas supplier **ASK IF CODE 2 AT Q9**		
c) Your electricity supplier **ASK IF CODE 2 OR 3 AT Q9**		
d) Your communications supplier (who provides your telephone landline and broadband services)) **ASK IF CODE 1 AT Q10**		
e) Your telephone landline supplier **ASK IF CODE 2 OR 4 AT Q10**		
f) Council services **ASK ALL**		

g) Your home broadband provider **ASK IF CODE 2OR 3 AT Q10**		
ASK ALL **Q44How much do you agree or disagree that your water** [IF CODES 1-10 AT Q4A also insert '**and sewerage'] company cares about the service it gives to customers? READ OUT. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	

Q45 How much do you agree or disagree that your [IF CODE 1 AT Q9 = **'energy';** IF CODE 2 AT Q9 = **'gas or electricity'**; IF CODE 3 AT Q9 = **'electricity'] company cares about the service it gives to customers? READ OUT. SINGLE CODE**		
Strongly agree	1	
Tend to agree	2	
Neither agree nor disagree	3	
Tend to disagree	4	
Strongly disagree	5	
Don't know	99	
Q46a How much do you trust your [CODE 2 AT Q4C OR 1 AT Q4D OR CODES 11-24 AT Q4a = '**water'] /** [ALL OTHERS = '**water and sewerage'] company. Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all**		
Do not trust them at all	1	Q46b
	2	
	3	
	4	
	5	Q47
	6	
	7	
	8	
	9	
Trust them completely	10	
NEW Q46b		
ASK IF CODES 1-4 AT Q46a. OTHERS GO TO Q47 **Q46b Why do you give a score of** *<insert code from Q46a>***?** **TYPE IN**		
ASK ALL **Q47 How much do you trust your** [IF CODE 1 AT Q9 = **'energy';** IF CODE 2 AT Q9 = **'gas or electricity'**; IF CODE 3 AT Q9 = **'electricity'] company? Please give a score on a 1-10 scale where 10 means that you trust them completely and 1 means that you don't trust them at all**		
Do not trust them at all	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Trust them completely	10	

ASK YORKSHIRE WATER CUSTOMERS ONLY (CODED 10 AT Q4a) **Q48 On a scale of 1 to 10 where 1 = strongly disagree and 10 = strongly agree, to what extent do you agree or disagree that... READ OUT EACH SERVICE & SINGLE CODE** **Scale: 1= strongly disagree – 10 = strongly agree 99= don't know** **1. Yorkshire Water acts in an open and honest way** **2. you trust Yorkshire Water to do what it says it's going to do.**		
ASK THAMES WATER CUSTOMERS ONLY (CODED 7 AT Q4a) **Q49 Do you trust Thames Water to provide a safe and reliable service? SINGLE CODE ONLY** **Yes, I trust Thames Water to provide a safe and reliable service** **Yes, I trust Thames Water to provide a safe service only** **Yes, I trust Thames Water to provide a reliable service only** **No, I don't trust Thames Water to provide a safe and reliable service** **Don't know**	 1 2 3 4 99	
ASK NORTHUMBRIAN AND ESSEX & SUFFOLK WATER CUSTOMERS ONLY (CODED 3 OR 16 AT Q4a) **Q50 To what extent do you agree or disagree that... READ OUT EACH SERVICE & SINGLE CODE** **Scale: Strongly agree, tend to agree, neither agree nor disagree, tend to disagree, strongly disagree, 99 = don't know** **1. [insert Q4a code] has good communications with the community** **2. [insert Q4a code] is an environmental, green company**		

ASK IF CODE 1 OR 2 AT Q34 AND CODE 4 OR 5 AT Q7 **Q51 You have said that you are satisfied with <u>water</u> services you receive, but you are dissatisfied with value for money. Why is this? DO NOT READ OUT. MULTICODE OK**		
Cost/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Problems with sewers/drains	4	
Poor water quality	5	
Poor/inefficient service/issues not resolved	6	
Water meter issues/problems	7	
Leaking pipes	8	
Lack of visibility	9	
Not enough information/communication	10	
Profits too high	11	
Confusing bills	12	
Price isn't fair	13	
No choice/monopoly	14	
Prices for any service could probably be lower	15	
Other (specify)	16	
Don't know	99	
ASK IF CODE 1 OR 2 AT Q42a AND CODE 4 OR 5 AT Q8 **Q52 You have said that you are satisfied with <u>sewerage</u> services you receive, but you are dissatisfied with value for money. Why is this? DO NOT READ OUT. MULTICODE OK**		
Cost/prices have risen	1	
Rates are unfair/should depend on size of household	2	
Problems with sewers/drains	3	
Poor water quality	4	
Poor/inefficient service/issues not resolved	5	
Water meter issues/problems	6	
Leaking pipes	7	
Lack of visibility	8	
Not enough information/communication	9	
Profits too high	10	
Confusing bills	11	
Price isn't fair	12	
No choice/monopoly	13	
Other (specify)	14	
Don't know	99	

ASK IF SEVERN TRENT, NORTHUMBRIAN OR ESSEX & SUFFOLK WATER CUSTOMERS (CODE 3, 4 OR 16 AT Q4a). OTHERS GO TO Q54 **Q53 If it were possible to choose your water supplier, on a scale of 0-10, where 0 means you wouldn't be likely to recommend, and 10 means you would be extremely likely to recommend, taking everything into account, how likely would you be to recommend ['insert code given at Q4a'] to friends and family as a provider of water and waste services?** SINGLE CODE ONLY		
Not at all likely to recommend	0	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Extremely likely to recommend	10	
ASK ALL **Q54 Sometimes companies perform better than expected and therefore make more profit. If this happens, which of the following would you prefer them to do? RANDOMISE ORDER READ OUT. MULTICODE OK** **INTERVIEWER ADD IF NECESSARY: So is that** *improving services; helping low income customers; giving a rebate or rewarding shareholders?*		
Spend more on improving services that customers think are important rather than using customer bills to finance improvements	1	
Provide more financial help to customers on low incomes who genuinely struggle to pay bills rather than customer bills financing this support	2	
Provide a one-off rebate on the bill to all customers (although this may only be a few pence per customer)	3	
Reward shareholders who have invested in the water and/or sewerage company beyond the level of return they were expecting	4	
Other (specify)	5	
Don't know	99	

ASK IF MORE THAN ONE SPECIFIED AT Q54 (CODES 1-5). OTHERS GO TO Q56 **Q55 And which is the most important, next important, next important?** *<Script Note: Only display codes given at Q54) and use scale: First, second, third, fourth, fifth dependent on number of codes displayed>*		
Spend more on improving services that customers think are important rather than using customer bills to finance improvements	1	
Provide more financial help to customers on low incomes who genuinely struggle to pay bills rather than customer bills financing this support	2	
Provide a one-off rebate on the bill to all customers (although this may only be a few pence per customer)	3	
Reward shareholders who have invested in the water and/or sewerage company beyond the level of return they were expecting	4	
Other (specify)	5	

Section E: Speaking up for Water Consumers

READ OUT: The Consumer Council for Water was set up in October 2005 to represent customers of water and sewerage companies in England and Wales. The Consumer Council for Water provides a national voice for water and sewerage consumers. They want consumers to get (and be able to recognise that they are getting) high standards and good value for money in water and sewerage services, comparing well with the best of other service sectors.		
ASK ALL **Q56 How important is it to you to have a consumer body representing your interests about the water and sewerage services you receive? READ OUT. SINGLE CODE**		
Absolutely essential	1	
Very important	2	
Fairly important	3	
Not very important	4	
Not at all important	5	
Don't know	99	
ASK ALL **Q57 If you wanted to get in touch with Consumer Council for Water, do you know where to look for their contact details?** IF YES ASK **Where? DO NOT READ OUT. MULTICODE OK**		
Yes:		
Online – search engine (e.g. Google)	1	
Online – water company website	2	
Online – Ofwat website	3	
Online – Consumer Futures	4	
Online – CCWater website	5	
Back of water bill	6	
Telephone directory	7	
Citizen's Advice Bureau	8	
Other (specify)	9	
No, don't know where to look	10	

Section F: Background

ASK ALL **Q58 Please record the gender of the respondent DO NOT ASK**		
Male	1	
Female	2	
ASK ALL **Q59 Which of the following age groups do you fall into? READ OUT SINGLE CODE**		
18-24	1	Q61
25-34	2	
35-44	3	
45- 60	4	
61-74	5	Q60
75+	6	
Refused	97	Q61
ASK IF CODE 5-6 AT Q59. OTHERS GO TO Q61 **Q60 Are you retired? SINGLE CODE**		
Yes	1	
No	2	
Refused	97	
ASK ALL **Q61 How would you describe your ethnic background? PROMPT IF NECESSARY. SINGLE CODE**		
White: British	1	
White: Irish	2	
White: Any other White background	3	
Mixed: White and Black Caribbean	4	
Mixed: White and Black African	5	
Mixed: White and Asian	6	
Mixed: Any other Mixed background	7	
Asian or Asian British: Indian	8	
Asian or Asian British: Pakistani	9	
Asian or Asian British: Bangladeshi	10	
Asian or Asian British: Any other Asian background	11	
Black or Black British: Caribbean	12	
Black or Black British: African	13	
Black or Black British: Any other Black background	14	
Chinese	15	
Other	16	
Refused	97	

ASK ALL **Q62 Do you or anyone in your household have a long-term illness, health problem or disability which limits your daily activities or the work you can do? MULTICODE OK FOR CODES 1/2** Yes (self) Yes (other) No Don't know/refused	1 2 3 99	
ASK ALL **Q63 Including yourself, how many adults, i.e. 18 years or over, are there in your household? And how many children, i.e. under 18 years old and under 5 years, are there in your household? READ OUT SINGLE CODE** *[Scale: 1= one, 2= two, 3= three, 4=four, 5= five, 6 = six+; 97= refused.* a) Adults i.e. 18 years and over b) Children aged 6 – 17 c) Children aged 0-5		
ASK ALL **Q64 What is the occupation of the main income earner in your household? CLASSIFY ACCORDING TO FOLLOWING OCCUPATIONAL GROUPINGS. IF PENSIONER/RETIRED PROBE FOR PREVIOUS OCCUPATION. SINGLE CODE** A – Very senior managerial positions (large organisations) and professional occupations B – Senior managerial; business owners. Middle management in large organisations C1 – Small employers; junior management and other non-manual occupations C2 – Skilled manual workers e.g. served apprenticeships, special qualifications or certificates D – Semi skilled and unskilled workers E – Casual workers; unemployed and otherwise not working Refused	1 2 3 4 5 6 99	

ASK ALL **Q65 And are you/someone in your household currently receiving any benefits or tax credits? SINGLE CODE**		
Yes	1	
No	2	
Don't know	99	
Refused	97	
ASK ALL **Q66 What type of accommodation do you live in? READ OUT SINGLE CODE**		
Owner occupied	1	
Private rental	2	
Council tenant	3	
Housing Association tenant	4	
Leaseholder	5	
Don't know	99	
Refused	97	
ASK ALL **Q67 Would you say you live in an urban or rural area? READ OUT.SINGLE CODE**		
Urban	1	
Rural	2	
` Suburban/semi rural	3	
Don't know	99	
ASK ALL **Q68 Do you have access to the internet?**		
Yes	1	
No	2	
Don't know	99	
Refused	97	
ASK IF CODED 1 AT Q21b OR Q25b. OTHERS GO TO CLOSING STATEMENT **Q69 You said you would be interested in having the telephone number for your water company. To find out more from** <insert water company name from Q4a> **you should call** <insert telephone number as per water company stated at Q4a from below table>		

Telephone Numbers

Q4a Code	Water Company	Q69a insert
1	Anglian Water Services Ltd	**08457 91 91 55**
2	Dŵr Cymru Cyfyngedig (Welsh Water)	**0800 052 0145**
3	Northumbrian Water Ltd	**0845 733 5566**
4	Severn Trent Water Ltd	**08457 500 500**
5	South West Water Ltd	**0844 346 1010**
6	Southern Water Services Ltd	**0845 272 0845**
7	Thames Water Utilities Ltd	**0845 9200 888**
8	United Utilities Water Plc (North West Water)	**0845 746 2222**
9	Wessex Water Services Ltd	**0845 600 3 600**
10	Yorkshire Water Services Ltd	**0845 1 24 24 24**
11	Sembcorp Bournemouth Water Plc (Sembcorp)	**01202 590059**
12	Bristol Water Plc	**0845 600 3 600**
13	Cambridge Water Company Plc	**01223 706050**
15	Dee Valley Water Plc	**01978 833 200**
16	Essex & Suffolk Water	**0845 782 0111**
17	Affinity Water SouthEast	**0845 8885 888**
18	Hartlepool Water Plc	**01429 858 030**
19	Portsmouth Water Plc	**023 9249 9666**
20	South East Water Plc (including Mid Kent Water Plc)	**0333 000 0001**
21	South Staffordshire Water Plc	**0845 60 70 456**
22	Sutton & East Surrey Water Plc	**01737 772 000**
23	Affinity Water East	**0845 148 9288**
24	Affinity Water Central	**0845 769 7985**

Thank you for sparing the time to take part.

This survey was conducted on behalf of the Consumer Council for Water and is intended to allow them to better understand your requirements and help provide a better service to you, the consumer.

Should you wish to contact the Consumer Council for Water you can call their national enquiries line on 0845 039 2837 **or visit their website at www.ccwater.org.uk**

Should you want to contact the MRS (the Market Research Society) to verify that SPA Future Thinking comply with the code of conduct you can call them on 0500 39 69 99.

SPA Future Thinking

Technical Report

2013 Annual Tracker

CONSUMER COUNCIL FOR Water

Prepared for: Consumer Council for Water
Ref: JN1576/DD/JM/BW
Date: March 2014

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1.Technical Report

1.1 The aims and objectives of the survey

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

- customers' views about all aspects of water and sewerage services
- customers' concerns and satisfaction with the delivery of water and sewerage services, and;
- how customers' views change over time.

1.1.2 The specific research objectives are to provide, for each WaSC, WoC and each WaSC region[1], a benchmark of customers':

- understanding of their rights and responsibilities in relation to CCWater's five key themes
- perceptions of value for money of water and sewerage services
- satisfaction with service delivery by the water industry, identifying concerns and priorities for action
- expectations for service delivery by the water industry, identifying areas for service improvement

1.1.3 CCWater will further use the research findings to:

- provide greater legitimacy in representing customers
- provide a stronger evidence base on which to make policy decisions, and gauge customers' concerns and satisfaction with delivery of water services
- develop an effective communications strategy
- determine how it has added value or made an impact by measuring service provision and consumer perception of CCWater's impact and performance.

[1] WaSC regions comprise the area served by each WaSC, i.e. where they provide water and sewerage services or sewerage services only. For example, Wales as a WaSC region comprises all Welsh Water customers and all Dee Valley customers.

1.2 Methodology

1.2.1 The research was conducted via telephone with a randomly selected sample of households across England and Wales.

1.2.2 Interviews were conducted with individuals who are responsible, either solely or jointly, for paying their household's water bill.

1.2.3 The main fieldwork was conducted between 24 October 2013 and 6 January 2014.

1.2.4 A total of 5,805, 20 minute telephone interviews were completed. CCWater commissioned 200 interviews per WaSC and 150 per WoC. However, 9 water companies opted to boost their customer sample by between 150 and 300 interviews, increasing the sample by a further 1,850 to 5,805.

1.2.5 This represents the largest number of interviews ever conducted and as a result of the large sample size a change of one or two percent is statistically significant. However, consideration should be given to whether this is meaningful. In this respect it is helpful to look at longer term trends alongside changes since last year.

1.2.6 The questionnaire was largely similar to previous years, although it included a small number of new questions and dropped a few questions used in previous years, to ensure that the survey addresses emerging issues as well as on-going issues that may be of interest to water customers.

1.2.7 The findings for each water company are not included in this report, but are published on CCWater's website.

1.3 Analysis

1.3.1 Analysis has been conducted largely by total sample (England and Wales combined), by country (England vs. Wales), and by WaSC region (WoC respondents were assigned to a WaSC region according to their postcode).

1.3.2 As in previous reports comparisons are made between different WaSC regions. Readers should note that the margins of error for regions will vary depending on the sample size, and that caution is required in interpreting the results. This is also the case when comparisons are made between different years at the WaSC region level. Figure 1 shows the margins of error for each WaSC region.

1.3.3 Demographic analysis is included where base sizes are large enough to allow for reliable comparisons. Access to the internet has not been included as a variable in the analysis, because access is virtually universal amongst those under 60 years. The impact of this is that a comparison of users and non-users is similar to analyses based on age of the respondent.

1.3.4 During the fieldwork there was considerable media attention on utility prices. Analysis of different time periods related to media activity did not show significant changes in respondents' answers.

1.3.5 As in previous reports comparisons are made with survey results in previous years. Readers should note that the demographic characteristics of the sample are not weighted and that some of the variation between results may be due to variations in the achieved sample.

1.3.6 Data are weighted according to figures provided by CCWater reflecting the number of connections (water and sewerage or water only, as appropriate) per company, to enable comparison by WaSC region.

1.3.7 The data are weighted to be representative of each WaSC region. Weighting by WaSC region adjusts for the difference in sample sizes across the WaSC region. All charts show weighted data and give the unweighted base size.

1.3.8 Only statistically significant differences are discussed in the report (see Figure 1). The table overleaf shows the statistical reliability of results for total base sample sizes of 5,805, and national and regional reliability.

Figure 1: Margin of error for results at …

	Sample size	10% or 90%	30% or 70%	50%
Total	5,805	0.8	1.2	1.3
England	5,465	1.1	1.6	1.7
Wales	340	3.2	4.9	5.3
Eastern	806	2.1	3.2	3.5
Northumbria	553	2.5	3.8	4.3
Midlands	548	2.5	3.8	4.2
South West	358	3.1	4.8	5.2
Southern	700	2.2	3.4	3.7
Thames	911	2.0	3.0	3.3
North West	211	4.1	6.2	6.8
Wessex	877	2.0	3.0	3.3
Yorkshire	501	2.6	4.0	4.4

1.4 Socio-economic grades

1.4.1 The report refers to socio-economic grades, grouped as ABs, C1C2s and DEs. These are defined as follows:

Figure 2: Socio-economic grade definitions.

Socio-economic group	Definition
A	Higher managerial/ professional/ administrative
B	Intermediate managerial/ professional/ administrative
C1	Supervisory or clerical/ junior managerial/ professional/ administrative, student
C2	Skilled manual worker
D	Semi or unskilled manual work
E	Casual worker, not in permanent employment, Looking after the home, Retired and living on state pension, Unemployed or not working due to long-term sickness, Full-time carer of other household member

1.5 Sample Profile

1.5.1 The sample profile of achieved interviews (unweighted) and the weighted data is detailed below:

	Unweighted		Weighted	
	No	%	No	%
Total	**5805**	**100**	**5805**	**100**
Region				
Eastern	806	14%	643	11%
North West	211	4%	774	13%
Northumbria	553	10%	297	5%
Midlands	548	9%	946	16%
South West	358	6%	171	3%
Southern	700	12%	460	8%
Thames	911	16%	1352	23%
Wessex	877	15%	287	5%
Yorkshire	501	9%	535	9%
Wales	340	6%	339	6%
Age				
18-34	263	5%	273	5%
35-44	631	11%	630	11%
45-60	1821	31%	1862	32%
61-74	1985	34%	1970	34%
75+	938	16%	903	16%
Refused	167	3%	170	3%
Gender				
Male	2805	48%	2808	48%
Female	3000	52%	2997	52%
Household Composition				
One person household	1634	28%	1633	28%
Two person household	2133	37%	2093	36%
One parent family*	179	3%	172	3%
Two parent family*	771	13%	789	14%
Other	1088	19%	1119	19%
Refused	2	0%	2	0%
Meter use				
Meter users	3052	53%	2866	49%
Non users	2753	47%	2939	51%
Don’t know	3	0%	3	0%
Social Grade				
AB	1597	28%	1649	28%
C1C2	2470	43%	2452	42%
DE	1291	22%	1259	22%
Refused	450	8%	448	8%
Type of Water Company				
Water and Sewerage Company (WaSC)	3254	56%	3560	61%
Water only Company (WoC)	2551	44%	2245	39%