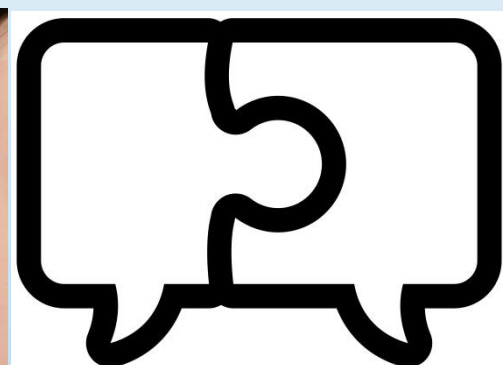




Consumer Council for Water:

Stakeholder Perceptions Research



On behalf of CCWater

Published 9 November 2015

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Foreword from Alan Lovell, Chair of CCWater

We would like to thank all our stakeholders who took the time to participate in this valuable research into how well you think we are doing and what we could do differently. We are pleased to hear there is strong support for the continuance of a water industry specific consumer body and endorsement of the commitment and effort that CCWater's people put into our work.

Although stakeholders value much of what we do, they also made some suggestions on how we could do things better. We have carefully considered these and decided to adapt the way we approach some of our day-to-day activities to improve how we work on behalf of water consumers.

We are working to strengthen our relationship with our stakeholders and promote collaborative working. As a first step in this process we organised a series of consumer issues workshops during September and October 2015. This gave stakeholders in each of our regions and in Wales an opportunity to discuss with us emerging water sector issues which may impact on consumers over the next three years and beyond. This thinking will also feed into the development of our Forward Work Programme.

We are committed to promoting best practice and publically praising those water companies which perform well and have customer-focussed policies. We will be clearer in our communication about which achievements are due to CCWater's involvement and those which are a result of collaborative work with the industry.

We have heard the challenge from stakeholders to increase our profile as a consumer advocate. We want to address this in a number of ways, including increasing the priority of our 'Speaking up for Consumers' work stream, considering where it is appropriate to work collaboratively with other stakeholders in our research and policy work, and where we can add value through interpretation and 'think pieces'.

Some stakeholders commented that they felt CCWater was straying into areas of work outside of our remit and sometimes focussed on regulatory-style behaviour. We think that this way of working is necessary in some areas if we are to fulfil our role in protecting consumers. For example, value for money continues to be an issue for many customers, and we will continue to challenge on the cost of capital, as it has a significant impact. We do recognise, however, that we should better communicate to stakeholders our reasons for continuing to be involved in these areas of work.

We are confident that stakeholders will begin to see positive changes in the way CCWater works and how we are addressing the comments made throughout this research. We are also committed to undertaking more frequent stakeholder research and engagement in the future.

November 2015

1 Executive Summary

1.1 Introduction

The Consumer Council for Water (CCWater) last surveyed its stakeholders in 2007 - two years after it was set up. This research was designed to provide a clear analysis of how CCWater is perceived by its stakeholders and whether perceptions have changed since 2007. The research was required to provide guidance on any changes that are needed to help CCWater best achieve its aim of working with companies to improve the policies and services offered to customers, and being an authoritative voice in the water sector.

CCWater's role

The Consumer Council for Water is the independent representative of household and business water consumers in England and Wales. Its job is to make sure that the collective voice of consumers is heard in national water debates and that consumers remain at the heart of the water industry. It also takes up consumers' complaints where they have tried and failed to resolve issues with their water companies. To do this effectively, CCWater works with water companies, regulators, Governments and a variety of other stakeholders. In part, CCWater's role is to challenge both industry and Governments.

Research context and timing

Every five years the economic regulator for the water and sewerage industry, Ofwat, sets price limits that enable water companies in England and Wales to deliver customer services and meet statutory requirements. The most recent Price Review (referred to as PR14 throughout this report) was different from those before it, in that companies were required by Ofwat to demonstrate that customer views were taken into account in the development of their business plans. To achieve this, companies conducted iterative programmes of customer engagement to help shape priorities, targets and outcomes. Engagement was reviewed at company level by independent scrutiny boards known as Customer Challenge Groups (CCGs).

CCWater was actively involved in this process, chairing a total of 15 CCGs, and participating in all 24. The process was largely completed in December 2014¹ (except for company appeals) and therefore the end of the PR14 activity marks an appropriate time to compare CCWater's recent performance to the baseline position in 2007. It is worth noting that throughout PR14, CCWater focused particularly on the issues prioritised by water customers, namely value for money, affordability and levels of service.

1.2 Overview of methodology

A dual methodological approach was used in which quantitative and qualitative interviews were undertaken in parallel. This comprised 25 qualitative depth interviews with **primary stakeholders** (*decision makers within the water industry e.g. senior management at water*

¹ One water company has subsequently sought to appeal its price determination

*companies and regulators). A further 75 quantitative telephone interviews were conducted with **secondary stakeholders** (decision makers at organisations outside of, but with an interest in, the water industry; and non-decision makers at organisations central to the water industry); and **tertiary stakeholders** (those with a general interest in water industry issues but who have more limited contact with CCWater).*

CCWater provided stakeholder contact details for the purposes of recruiting the sample, all of whom were sent an email from CCWater's Chair, Dame Yve Buckland, introducing the research and encouraging participation. The majority of interviews with primary stakeholders (n = 23) took place throughout December 2014 with a minority (n = 2) in the first week of 2015.

This research adopts both qualitative and quantitative methodologies. Qualitative research is employed when research objectives call for an exploratory and in-depth investigation - specifically, in this case, to understand in detail the perceptions of CCWater held by its primary stakeholders. Qualitative research results in a great deal of rich and detailed data about a relatively small number of individuals, which is in turn used to generate insights around broader stakeholder needs and the actions that can be taken to meet them. Quantitative research seeks to measure the prevalence of these views within the given population – which is why sample design is critical to the validity of quantitative survey data.

It is a very small 'universe' that makes up CCWater's stakeholder community therefore any quantitative sample of CCWater stakeholders is necessarily small. For this project, the sample universe of stakeholders comprised a total of 310 people of which 106 stakeholders participated i.e. over a third of the possible universe. This high ratio of participation means that it is appropriate to express the research findings in percentages, and that it will be possible to make statistically significant conclusions should the survey be replicated in future.

1.3 Key findings

Overview

CCWater's staff are respected by its stakeholders both at a local and national level and there is strong support for its continuance as a water industry specific consumer body. However, while stakeholders have endorsed the role of CCWater as an independent voice of the consumer, the detailed conversations with primary stakeholders reveal the need for it to develop a more authoritative voice in order to influence both companies and policymakers.

Current perceptions and comparisons with 2007

- CCWater is applauded for the commitment and effort it puts into its work, especially across PR14: 74% of respondents give a satisfaction rating of between 7 and 10.
- Individuals are praised, both at a local and national level, and the local contacts are valued particularly by smaller water-only companies. Across the board, water companies want CCWater to retain its local presence.

- CCWater is seen as *well established* and *independent* and these associations have increased from 2007 to 2014. However, being *respected by the industry* and having *policies based on research and evidence* are relatively weaker associations.
- A quarter of stakeholders feel there has been an improvement in CCWater's performance. Half think performance has stayed the same and a minority feel it has deteriorated.
- While personal relationships are good, the industry's respect for CCWater requires strengthening. There are a number of issues that appear to be undermining stakeholder respect for CCWater and its authority as a consumer body:
 - For some, there is the perception that CCWater strays into areas beyond its remit and encroaches on the regulatory role of other bodies. They question how CCWater's objectives relating to water quality or the environment relate to the regulatory work of DWI and Environment Agency. Some also query its remit around broader areas of value for money in the context of Ofwat's Price Review process.
 - The research it publishes is perceived to sometimes lack both rigour in its design and depth of insight in its interpretation.
 - It is lacking endorsement from Government: there is perceived to be uncertainty about CCWater's future existence.
 - Its relationship with Ofwat is perceived to be poor.
 - It is perceived to focus on its regulatory role i.e. holding the industry to account, while neglecting its wider advocacy role i.e. championing water customers and consumers.

Profile and Communication

- Stakeholders almost universally feel they understand what CCWater does 'very' or 'fairly well' – and this has increased significantly since 2007.
- Stakeholders feel informed about CCWater's work and receive the 'right amount' of information.
- CCWater is perceived to understand its stakeholders' organisations and is successful in targeting the right people.
- Reflecting the importance of having personal relationships with CCWater, face-to-face and/or telephone communication channels are the most important. On Tap² is regarded positively by the third of stakeholders who receive it. While primary stakeholders would not expect to rely on an e-bulletin to hear from CCWater, it is an appropriate vehicle to communicate to secondary and tertiary stakeholders.

² On Tap is CCWater's quarterly e-bulletin which is targeted at Stakeholders. Stakeholders are required to register to receive

- While stakeholders find it difficult to recall specific reports unless prompted, it is clear that most are aware of several of CCWater's publications and/or projects and activities. This is particularly so in relation to publications/activities relating to the Price Review.
- Stakeholders appear to have contradictory views about the strength of profile that CCWater needs to be effective. The current (low profile) strategy of signposting water customers via water bills, websites and telephone directories is appropriate when CCWater is acting as a complaints resolver. However, many want to see CCWater having a higher profile in its wider advocacy role and believe it would be more effective at this if it had a higher profile e.g. in the media.

Collaboration and partnership

- CCWater's role is seen as important, even essential; and given the monopoly status of the market, most stakeholders support the need for a *water specific* consumer body.
- CCWater has identified the key work strands in its Forward Work Programme³ after research with water customers to understand their priorities⁴. This stakeholder research, however, identifies a perception gap in terms of what stakeholders think is important compared with where they see CCWater performing strongly:
 - 3 of the 4 key work strands highlighted in the Forward Work Programme are of lower importance to stakeholders (*Pressing for fair and affordable charges that are value for money; Pressing the industry to ensure customers receive safe, reliable, quality drinking water and sustainable sewerage services; Pressing for services that are right first time*).
 - The reason for this is that stakeholders – including those from water companies, Governments, regulatory and industry bodies - perceive CCWater seeking to influence in some areas that they consider are beyond its remit – or overlap with the roles of other bodies.⁵
 - Stakeholders do not suggest that it is less important for consumers to be represented in these areas but that the key work strands appear to overlap with other bodies e.g. *Value for money* and Ofwat; *Safe and reliable drinking water* and DWI.
 - In the specific case of services being right first time, stakeholders within water companies point out that the industry is strongly motivated to deliver

³ CCWater consults on and publishes its priorities each year in its Forward Work Programme.

⁴ <http://www.cewater.org.uk/wp-content/uploads/2014/01/Expectations-of-The-Consumer-Council-for-Water-.pdf>

⁵ Water Act 2003 gives CCWater a broad remit to investigate any issues of interest to customers and to publish advice or information about consumer matters or consumer views where it would promote the interests of consumers.

high service standards, which is why they do not rate this area as important as some of CCWater's other areas of work.

- Stakeholders perceive a number of different roles that CCWater is performing:
 - **Complaints resolver** *i.e. working with both customers and companies to resolve specific complaints:* seen as core to CCWater's activities and conducted well. It is unclear whether the new alternative dispute resolution service will change CCWater's role.
 - **Challenger, holding the industry to account** *i.e. representing the views of customers via its participation in the industry's regulatory processes, and publishing research and data providing industry comparisons:* CCWater is perceived to have been most active in this role. However, there is concern that it has stepped into the economic regulator's space. Furthermore, CCWater is criticised by some companies for its regulator-like behaviours such as implementing quarterly reporting, or the perception that it is quick to criticise the industry and slow to praise it.
 - **Consumer Advocate** *i.e. championing the interests of all consumers by being informed about consumer matters and in turn informing all relevant parties:* CCWater is perceived to perform least strongly in this space and yet this is a role that both Governments and companies are keen to see CCWater fulfil.
- Primary stakeholders voice concern about the balance of these roles and specifically that the challenger role is too dominant and the advocacy role needs strengthening.
 - Government and regulatory stakeholders do not see CCWater leading the consumer agenda in the policy setting arena and stakeholders have low awareness of CCWater's role influencing Governments.
 - Stakeholders from water companies want CCWater to apply its broader advocacy role and to work more collaboratively with the industry: currently CCWater's perceived regulatory style of behaviour acts as a barrier to closer, collaborative working.

Recommendations

This research has identified that the perceived emphasis on the *challenger* role of holding the industry to account (albeit that this is inherently representing consumer interests), to the exclusion of championing the consumer, is undermining the respect stakeholders have for CCWater – and therefore its potential to set the consumer agenda. The post-PR14 period gives CCWater the opportunity to consider how it balances its various roles in order to optimise its influence and increase its authority before the PR19 cycle gets underway. Importantly, where its objectives are perceived to overlap with other bodies, CCWater should clarify its precise agenda – specifically in the areas of value for money, environmental issues and drinking water quality.

We recommend the following areas for consideration:

CCWater should demonstrate to stakeholders how it is adding value to the industry in its role as a consumer advocate. It is one space that is uniquely CCWater's and it is the role

that (primary) stakeholders prioritise for CCWater but perceive to be the least in evidence. It may be necessary to increase focus in this area.

Similarly, CCWater should reconsider the emphasis it places on key strands of work as not all areas are aligned to stakeholder expectations. Stakeholders perceive unnecessary (and sometimes unwelcome) overlaps with Ofwat when CCWater is acting in its 'industry challenger' role. Additionally, stakeholders do not perceive CCWater having a specific role in areas covered by statutory environmental or water quality regulators. Should these areas of work remain central to CCWater's Forward Work Programme, we recommend that CCWater articulates its specific objectives for representing customers to avoid the criticism that it is encroaching on e.g. the economic regulatory space.

Improve CCWater's status and authority as the consumer voice: specifically, review research output and improve its ability to 'enlighten' stakeholders. While CCWater currently uses research to convey what consumers have to say about the industry, stakeholders are looking for a more strategic analysis of what CCWater's data means for the industry, and that the 'uninformed' customer view is contextualised. Hence, CCWater should draw on broader sources to produce think-pieces or White Papers to express well-evidenced arguments. While its role as an independent customer voice means it is appropriate for some types of research to be conducted independently of the industry, in other instances it would be appropriate to collaborate with and involve stakeholders in developing consumer insights.

Review CCWater's corporate 'tone of voice' and behaviours. In keeping with a more collaborative persona seeking to inform and influence, CCWater should look across all its activities to redress behaviours that can appear *combative and critical*. It should strive to adopt behaviours that support the wider advocacy role and convey four key characteristics:

Constructive

- Go beyond highlighting the problem by bringing solutions, where possible, or a deeper understanding of the root causes of problems e.g. the underlying reasons for types of complaints.
- Understand and allow for local differences (rather than applying a standardised approach across all water companies).
- Be more visible in championing the customer across a range of themes going beyond the value for money agenda which some stakeholders perceived to have dominated during the PR14.

Enabling

- Engage and influence policymakers and the industry with deep consumer insight.
- Drawing together corroborating research strands and using expert witnesses', 'White Papers' or Think pieces.
- Develop and use connections with other consumer bodies, drawing on future-thinking in other areas of consumer protection.

Collaborative

- Build on existing collaboration with individual water companies by seeking ideas around new research or campaign activity.
- Be publically supportive of the industry and/or individual water companies where activities align with CCWater's programme of work or as best practice case studies.
- By acting as a hub for wider consumer issues that have relevance to the water industry, CCWater would enable water companies to work with or understand the perspective of non water-specific consumer bodies and charities. For example, mental health charities are unlikely to have policy statements that specifically relate to water services and for them to engage with companies across the industry would be very onerous. This is where CCWater could act as a hub to inform the industry of the pertinent issues that all water companies should consider.

Strategic

- Develop a more future-focussed understanding of the consumer agenda by horizon-scanning macro-themes such as intergenerational fairness (e.g. is one generation paying more than another for water investment); societal trends that could impact the industry; relevant insight from other (more developed) countries/sectors.
- Become more visible at a national policy level: influence (and be seen to influence) Governments and other industry regulators.
- Strengthen leadership credentials as the consumer advocate in this sector.

2 Introduction

2.1 Background to the project

The Consumer Council for Water (CCWater) represents the views of consumers and customers in the water sector across England and Wales. The water sector is unique in the UK, comprising regional monopolies (the water companies) who serve almost every household and business.

The sector is undergoing substantial change. Customers are increasingly being placed at the heart of business planning. The sector is also undergoing structural changes - not least with the liberalisation of the non-household market in England⁶.

In 2014 CCWater commissioned Blue Marble Research to undertake research to evaluate the views of stakeholders regarding its performance. CCWater last surveyed its stakeholders two years after it was set up in 2007⁷; the end of the PR14 activity marked an appropriate time to compare its more recent performance to this baseline position. It should be recognised, however, that the industry and economic context has changed significantly in this period – and CCWater is no longer a new organisation.

2.2 Project aims and objectives

CCWater identified three indicators of success (shown in Figure 1) and a key aim of this research was to evaluate CCWater's performance in relation to these indicators. The research is also to be used to inform the development of future plans and provide guidance on what CCWater should do to achieve its success indicators.

Figure 1 CCWater indicators of success

Increase the number of key stakeholders who rate CCWater as influential in getting the best deal for water and sewerage customers.
Influencing industry research programmes so that they reflect consumer perspectives.
Establishing CCWater as an authoritative voice in the eyes of media and opinion formers so they seek CCWater out for comment.

The following specific objectives were defined for this project:

⁶ Following the Water Act 2014, from 2017 the market will open up allowing all non domestic customers to purchase water from any water company holding a licence.

⁷CCWater. *Research into stakeholder views of CCWater* (2007). Prepared by Carol Goldstone Associates Available from: <http://www.ccwater.org.uk/wp-content/uploads/2013/12/Research-into-Stakeholder-views-on-CCWater-September-2007.pdf>

2014 perceptions (vs. 2007)

- To measure current perceptions of CCWater e.g. satisfaction, effectiveness, organisational attributes, and influence.
- To establish stakeholder commitment to CCWater's Forward Work Programme.

Profile and communication

- To explore stakeholder understanding of CCWater's role.
- To understand how stakeholders rate CCWater's provision of information on consumer issues.
- To explore how stakeholders would like CCWater to develop an evidence base to inform cross-industry policy decisions on consumer issues.
- To assess the clarity and comprehension of CCWater's communications and whether communications are aimed at the right person/level within stakeholder organisations.
- To establish whether CCWater is using the most effective communication channels.

Collaboration and partnership

- To explore stakeholder priorities and how these align with CCWater priorities.
- To understand how best to influence stakeholders and what will be most effective to deliver positive outcomes.
- To understand how to make better use of partnerships and sharing information.
- To identify which stakeholders are most receptive to partnership working.
- To identify opportunities for using stakeholder communications to promote CCWater's work.

2.3 Methodology

A database of 310 stakeholders and their contact details was supplied by CCWater. Stakeholders were classified according to **level** – primary, secondary or tertiary (as detailed below) and **theme** - e.g. water, Government, regulatory etc.

Primary	Secondary	Tertiary
<i>Decision makers at organisations who are central to the operation of the water industry e.g. water companies and regulators.</i>	<i>Decision makers at organisations with an interest in the water industry but who are not central e.g. the MD of a charity.</i> <i>Non-decision makers at organisations central to the water industry e.g. Operations Manager at a water company.</i>	<i>Those with a general interest in water industry issues but who have more limited contact with CCWater.</i>

A dual methodological approach was used in which quantitative and qualitative interviews were undertaken in parallel. A qualitative methodology, specifically depth interviews, was used to gather the views of primary stakeholders. A quantitative methodology, specifically computer assisted telephone interviews (CATI), was used for secondary and tertiary stakeholders.

Key quantitative metrics were included in the depth interviews and merged with the quantitative data resulting in a total sample of 106.

In early November 2014 all stakeholders received an introductory letter, addressed from CCWater's Chair, Dame Yve Buckland. This provided information and reassurances about the upcoming survey. Copies of the letters issued are provided in Appendix 7.1 (primary sample) and 7.2 (secondary and tertiary samples).

Further information about the methodology is provided below.

<p>Qualitative - <i>Primary stakeholders</i></p> <ul style="list-style-type: none"> • In-depth interviews undertaken by Blue Marble • 17 face to face and 7 by telephone • 1 hour in length • 25 interviews completed with a total of 30 stakeholders taking part (where interview meetings comprised 2 or more participants) 	<p>Quantitative - <i>Secondary and Tertiary stakeholders:</i></p> <ul style="list-style-type: none"> • Computer assisted telephone interviews (CATI) undertaken by professional fieldwork agency Hill Taylor Limited • 20 minutes in length • 77 interviews undertake in total
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Most of the fieldwork took place in December 2014. This was with the exception of 2 primary interviews which were scheduled in January 2015.

2.4 Design and refinement of materials

The questionnaire, discussion guide and show cards were designed by Blue Marble Research in collaboration with CCWater. There needed to be a substantial redesign of the questionnaire used for the 2007 research to ensure it was fit for purpose in 2014. However, where appropriate, questions from 2007 were included for comparison.

Blue Marble undertook 3 pilot depth interviews and 2 pilot quantitative interviews to review the suitability of the materials and questions. Following the pilot a number of minor changes were made to the research materials. A summary of these changes are given below:

- Q3. Focus of role: Changed from *water as primary or secondary focus* to *water industry remit or broader focus* as stakeholders were not clear on the meaning of primary and secondary focus.

- Q11/12. Importance and performance: The item '*Engaging with the Government on strategic issues*' was added following a suggestion made at pilot interview.
- Q16. Ways of engaging with CCWater: The response options were changed after the pilot as respondents found those used in 2007 difficult to relate to.
- Q26. Frequency of contact: The question was changed from *contact in the last 6 months* to average frequency of contact.
- Q32. The value placed on the role of CCWater was added after the pilot following a suggestion from a primary stakeholder.

CCWater signed off the final versions of the materials and these can be found in Appendix 7.3 (questionnaire), 7.4 (discussion guide) and 7.5 (show cards). The pilot was also followed by five 'soft launch' interviews undertaken by sub-contractor Hill Taylor Limited prior to full launch of the telephone survey. The soft launch ensured that all survey routing was functioning correctly and that the interviewers were happy with the questionnaire structure and wording.

2.5 Sample breakdown

Table 1 provides a breakdown of the total number of interviews undertaken according to stakeholder level and theme. At the request of two stakeholder organisations, 2 depth interviews each comprised 3 respondents. The figures in brackets indicate the *total number of respondents* alongside the total number of interviews. The overall number of interviews undertaken was 102, but the total number of stakeholders consulted was 106. A breakdown of the roles of the primary stakeholders who took part is shown in the text box to the right.

- 16 x CEO-level/Directors
- 5 x Customer Service Heads
- 2 x Operational roles
- 2 x Advisor/consultants

Table 1 Sample availability and number of completes achieved

	TOTAL		Primary		Secondary		Tertiary	
	Available	Achieved	Available	Achieved	Available	Achieved	Available	Achieved
Business customer group	44	13	0	-	24	4	20	9
CCGs	6	3	0	-	5	3	1	0
Consumer and Charity	27	8	3	0	12	5	12	3
Media	8	1	1	1	6	0	1	0
Utilities	5	3	0	-	2	1	3	2
Water	126	50 (52)	56	16 (18)	38	20	32	14
Representative, professional & industry bodies	21	7 (9)	3	1 (3)	12	6	6	0
Government	52	8	8	3	35	4	9	1
Regulatory	21	9	7	4	10	3	4	2
TOTAL	310	102 (106)	78	25 (29)	144	46	88	31

2.6 Data handling and confidence

Data from the quantitative survey was merged with key metrics from the depth interviews, resulting in a combined sample of 106 at its largest. Readers should be aware that the base sizes fluctuate due to changes made after the pilot and a small proportion of missing data from the depth interviews. This missing data resulted from a small number of interviews being unexpectedly cut short and/or senior interviewees who were eager to discuss issues qualitatively and could not be drawn on 'closed' survey questions. Furthermore, due to the need to gather insight and depth responses qualitatively, not all of the quantitative questions were asked to the primary stakeholders at depth interview.

Based on a sample universe of 310 and a 95% confidence level, the total sample of 106 stakeholders provides a margin of error of between 4.6% and 7.7% depending on the distribution of responses as shown below:

- 50%/50% - 7.7%
- 30%/70% - 7.1%
- 20%/80% - 6.2%
- 10%/90% - 4.6%

Data for the total sample is presented as a percentage. Where base sizes drop notably below 100 this has been noted following the base description underneath the figures.

The data for sub samples of stakeholders (e.g. primary, secondary and tertiary) are too small to allow for robust conclusions to be drawn. Notable differences from the sub-samples are discussed throughout this report but are not presented graphically as this data cannot be considered statistically robust.

Where appropriate data is compared to that collected in 2007. Readers should be aware that figures may not always add up to 100% due to rounding.

2.7 Future considerations

There are two key considerations that should be kept in mind if this stakeholder research is undertaken again in the future.

Managing gatekeepers

A combination of email and telephone calls were used to schedule appointments. For telephone – typically a more effective way to elicit a response – minor issues resulted from having a single contact number for multiple stakeholders in the same organisation. This meant that some gatekeepers received several calls. This was particularly an issue for Government contacts and the fieldwork supplier, Hill Taylor, was asked by a gatekeeper not

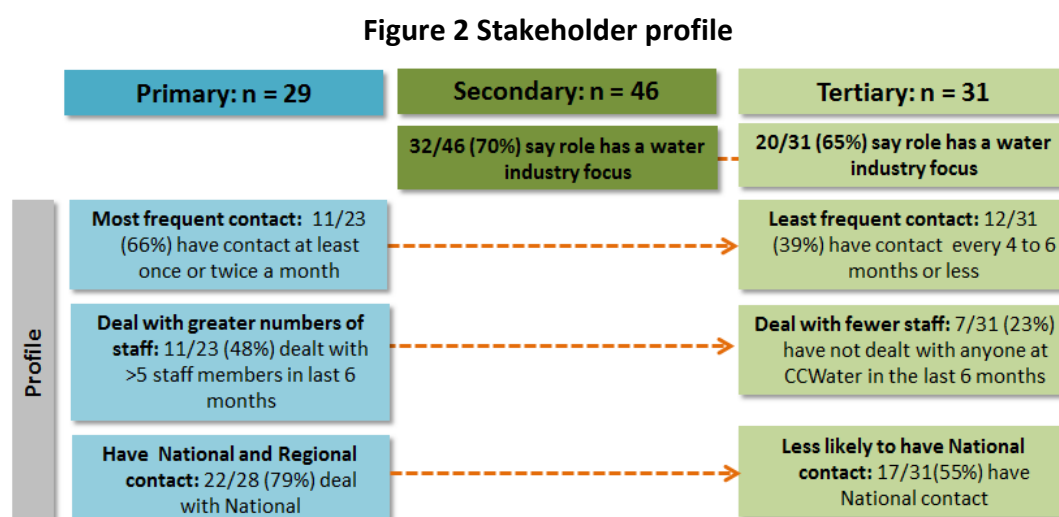
to call a mainline number again. This resulted in a reduced sample universe in that stakeholder theme.⁸

Managing staff at the same organisation

Naturally, colleagues do talk to each other and there was high awareness that in some organisations more than one staff member had been invited to take part in the research. To some stakeholders, asking multiple staff members to give their views felt inefficient or even inappropriate. This was more likely to be expressed by individuals who knew that someone more senior was participating. There was also some confusion over the two methods running in parallel (qualitative and quantitative) and who had been invited to which element and why.

2.8 Profile of respondents

Figure 2 and Figure 3 provide information about the profile of stakeholders who took part in this research.



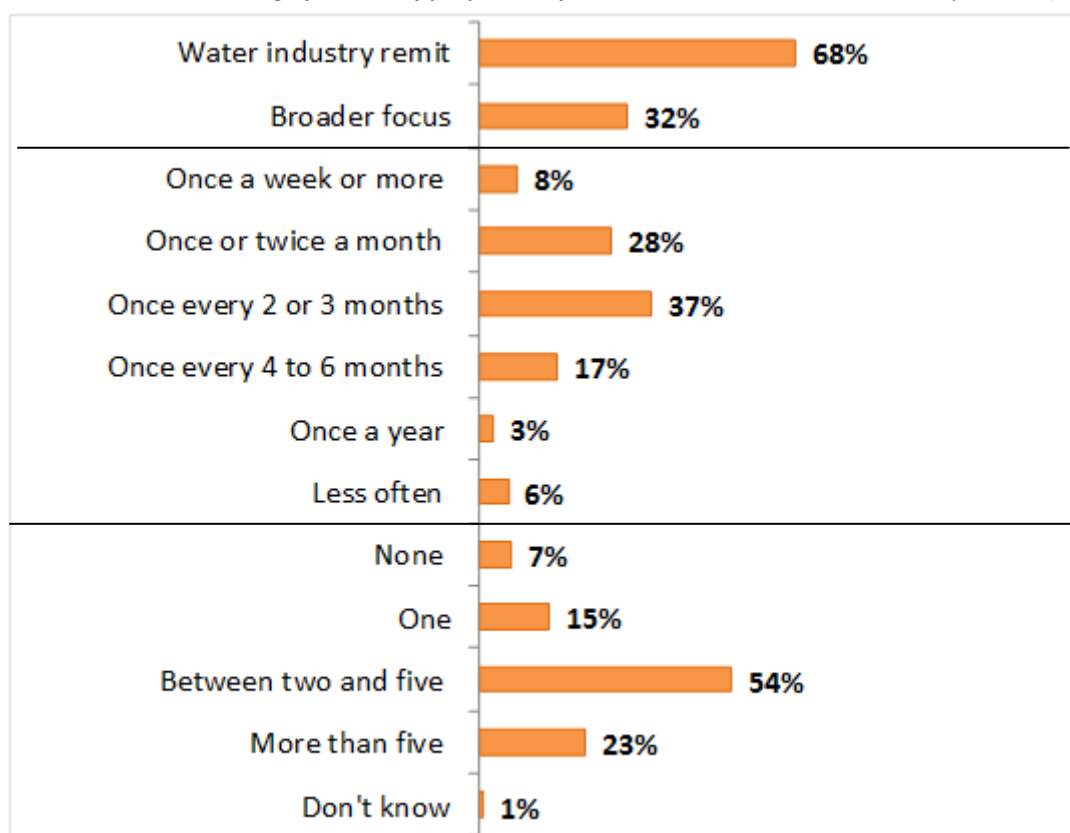
⁸ This is not thought to have influenced the flavour of the findings as other government stakeholders were generally well represented.

Figure 3 Stakeholder profile

Q3. Would you say your role has a water industry focus, or does your role have a broader remit of which water industry matters are one aspect? *Base: secondary and tertiary respondents (n = 77) *Low base sizes.*

Q26. On average, how often do you personally deal with CCWater? *Base: all respondents (n = 95).*

Q27. In the last six months, roughly how many people have you dealt with at CCWater? *Base: all respondents (n = 100).*



As shown, most secondary and tertiary respondents (68%) say their role has a water industry focus – with 32% saying that their role has a broader focus of which the water industry is only one aspect.

Almost three quarters of stakeholders (73%) deal with CCWater at least every quarter. In the last 6 months, most stakeholders have dealt with between 2 and 5 people at CCWater (54%).

Primary stakeholders deal with a greater number of CCWater staff – with almost half giving a response of ‘more than 5’.

3 Stakeholder relationships

3.1 Chapter summary

Stakeholders feel they have a good understanding of CCWater and this has deepened since the previous stakeholder survey in 2007. The organisation has increased its presence during PR14: stakeholders often articulated their respect and praise for key individuals during this period (both locally and centrally) and data shows that relationships are strongest at the local level.

CCWater is perceived to have played a major part in PR14, and many comment on a committed performance, though often couching these comments in the context of CCWater's limited budget and resources and the possible uncertainty regarding its future.

Most stakeholders have goodwill towards CCWater, sharing the view that it would be a loss to the industry if CCWater, with its industry-specific remit, was subsumed into a national consumer body.

3.2 Goodwill towards CCWater

Most primary stakeholders convey a sense of goodwill towards CCWater. Positive themes that emerged from the research included the following:

- Many stakeholders applaud the effort and commitment of CCWater – particularly in terms of the hard work of individual representatives - during PR14; and its presence throughout the industry has increased.
- CCWater enjoys very strong local relationships – these have often deepened during PR14. Stakeholders have high levels of respect for key individuals (locally and centrally).
- Stakeholders are conscious of the uncertainty of CCWater's future and perceive that this is not an easy operating context. Indeed, many note its strong performance given its limited budgets and resources.
- The role of an industry-specific consumer advocate is seen as important: the general view is that it would be a loss for the industry if CCWater's role was subsumed into a national consumer body.

"They have helped us over the last couple of years to be better and that is exactly what they should have been doing. The personal relationships are good." Primary, WoC

"We are a very big company but what they are good at is making sure the issues are never forgotten or that they don't fall off the list and they make sure customers are at the centre."
Primary, WaSC

“They have made their presence felt – this they have done well.” Primary,
Government/Regulatory

“I see [name]: she is one of those people who works collaboratively but like a critical friend. It’s a very positive relationship.” Primary, WaSC

“With more money and more resources they could probably improve. But they are a small organisation. What they achieve with the money they have available is really impressive. I think they should be very proud of what they have achieved.” Primary,
Government/Regulatory

At the start of the telephone survey, secondary and tertiary stakeholders were also asked to give their spontaneous views and opinions about CCWater. The table below presents an analysis of the comments made. It should be noted that secondary and tertiary stakeholders when making these initial comments often acknowledged their more limited contact with, and understanding of CCWater.

Positive themes	Neutral/negative themes
<ul style="list-style-type: none"> ✓ Important role – representing customer views ✓ Unbiased position ✓ Work well together/collaboratively ✓ Come across well at meetings/workshops ✓ Local contacts 	<ul style="list-style-type: none"> • Need greater visibility /public image • Over bureaucratic, can over-complicate • Don’t always see the ‘bigger picture’ e.g. long term or technical aspects of the industry • Not strategic enough • Post PR14 landscape: role in CCGs / overlap with Ofwat

Base: secondary and tertiary respondents (n = 77)

“They provide an opportunity for customers to speak to an external body if a consumer issue were to happen. It’s a completely unbiased opinion.” Tertiary, WaSc

“They have taken a hard line this Price Review. Trying to protect the customer and probably gloss over some of the difficulties of a regulated industry.” Secondary, WoC

“They do a lot of good things but they are very stretched in terms of their resources and they claim credit from outcomes which would have been delivered regardless.” Secondary, WaSc

“They haven’t been great at communicating up until now. Recently we have seen more coming through... but before you’d actually have to go and search the website for their regional meetings.” Secondary, Utilities

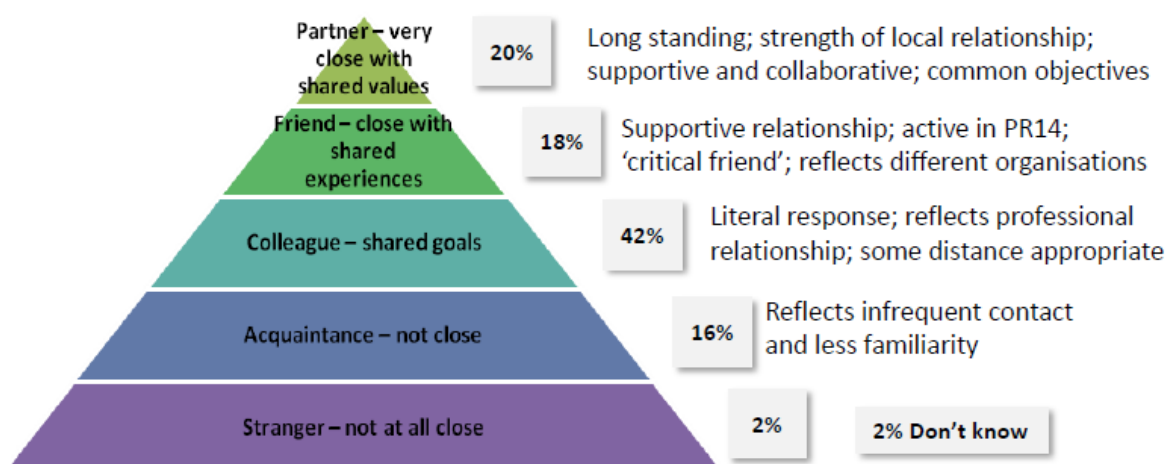
“They are very slow on acting on some of the complaints and don’t have the technical ability to understand some of them.” Tertiary, Business customer group

Detailed analysis reveals that the positive comments often come with caveats and are frequently followed up with a ‘*but...*’; for example ‘*but they need more resources*’, ‘*but they should have ‘more teeth*’, ‘*but they are not reaching their full potential*’. This is an important observation and reflects an overarching theme of this research. Whilst stakeholders have used the opportunity to level some criticisms at CCWater, it is important to acknowledge the underlying goodwill that stakeholders have for CCWater and that criticisms are voiced – in almost every case - in the context of wanting the industry to retain a strong consumer body.

3.3 Relationship with CCWater

The research included a projective question to explore the nature of the relationship stakeholders have with CCWater. The question uses a hierarchy model using personal relationships as analogous reference points. When asked to apply the relationship analogy shown in Figure 4, 80% of stakeholders likened their relationship with CCWater to a ‘colleague’, ‘friend’ or ‘partnership’. The ‘friend’ analogy is most likely to be selected by primary stakeholders (12 out of 28); while secondary and tertiary stakeholders are more likely to select a more distant relationship – 10 of the 31 tertiary stakeholders for example, likened their relationship to an ‘acquaintance’.

Figure 4 Relationship model



Q6. We want to understand the nature of your relationship with CCWater and how close or distant you are as a stakeholder. Which of the following is the best analogy? Base: all respondents (n = 105).

The relationship question was explored further in the qualitative interviews and this revealed that most stakeholders feel the nature of their relationship with CCWater is appropriate – irrespective of how they had described this relationship. Only a small number aspired to move up the hierarchy, acknowledging that to do so might be getting too close to the regulator. Some however, did wish to distinguish between (usually closer) relationships with their local representative compared with the national office.

A number of stakeholders noted that any relationship is reciprocal and its success depends on both parties.

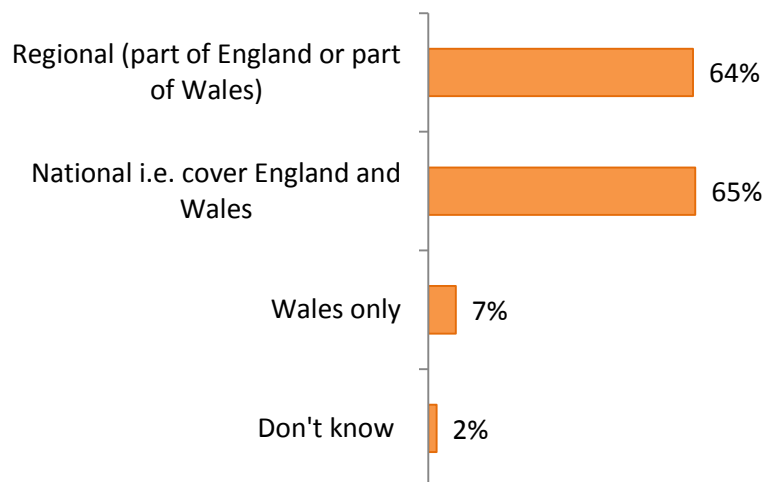
“It is a two way relationship and I want to stress that we could have contacted CCWater for this [more meetings] as much as CCWater could have contacted us. It is a joint responsibility.” Primary, Government/Regulatory

“Colleague... We share the same goals - wanting to give the customer the best service we can... This is very much for a regional level. Would say acquaintance for the national level. A higher level might be better but it’s not really that important. We are perfectly happy with the relationship we have at the regional level.” Primary, WoC

3.4 Working relationships are held with national and regional staff

Stakeholders were asked about their relationship at both the national and the regional office (Figure 5).

Figure 5 Extent of relationships with national and regional staff

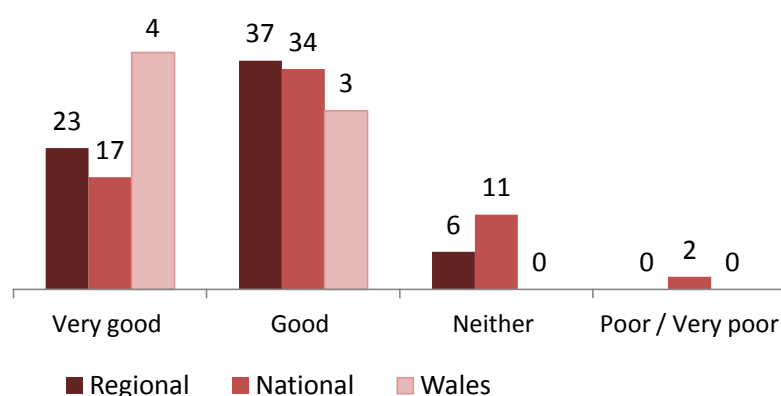


Q28. Do you deal with regional or national level CCWater staff? Base: all respondents (n = 105).

Equal numbers of stakeholders deal with national (65%) and regional staff (64%). Only a minority deal with staff in Wales (7%). Water companies are more likely to deal with regional staff, whereas Government/Regulatory bodies and Representative/Professional/Industry bodies deal more frequently with the national office. Similarly, primary stakeholders (17 out of 29) are more likely to deal with national level staff than secondary (32 out of 46) and tertiary (18 out of 31) stakeholders.

Stakeholders were asked to rate the contact they have with staff at national, regional and Welsh offices as appropriate. As shown in Figure 6, regional contact is rated more positively than national contact. Readers should note, however, that this data is based on very small samples sizes, particularly for Wales (n = 7) and should be interpreted with caution.

Figure 6 Success of the relationship with national and regional staff



Q29A. How would you rate the contact you have had with...? Base: regional staff (n = 66), national staff (n = 64), Wales staff (n = 7). ****Low base sizes – chart shows actual numbers***

The table below summarises the qualitative themes relating to national and regional relationships from the point of view of primary stakeholders.

National	Regional
<ul style="list-style-type: none"> • Smaller companies have limited national contact • Government, Regulators and larger companies have stronger relationships at the national level • Perceive the importance of a national agenda with central budget setting and policies • National contacts can lack local level knowledge and understanding • Perceived as more bureaucratic/ data driven than local level 	<ul style="list-style-type: none"> • Typified by stronger, more personal and trusted relationships • Value of local level support emphasised by smaller water companies • Preferred because a ‘one size fits all approach’ is not appropriate: different companies face different challenges • Concern about the retirement of regional CCWater staff and possibility of non-replacement

Base: primary stakeholders (n = 25)

“We very much value the local relationship and contact... if they move more towards the centre I think we would lose that relationship.” Primary, WoC

“It’s very important that CCWater works company by company and fully understands their individual circumstances.... you wouldn’t expect the regulator to do that – they take a one size fits all approach due to necessity – CCWater has much more of a role here .” Primary, WaSC

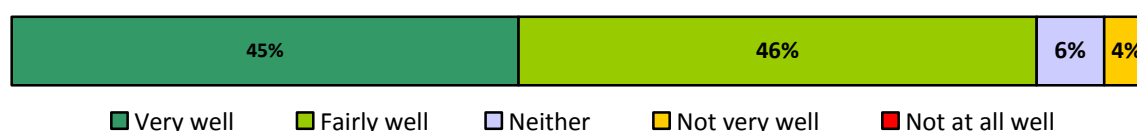
“...don’t become a head office function because you’ll lose the customer focus and with that your reason for being. You’ve got to maintain local contact at a regional level – real contact and building relationships with people rather than the stuff you could do on email every day of the week. If they do that I think they’ll survive – if they don’t I’m not sure...” Primary, WoC

In 2007 almost half of stakeholders perceived CCWater as both a regional and a national entity (49%); 35% saw it as being solely national and only 9% as solely regional. Though the data is not directly comparable, it appears that in 2014 CCWater’s profile and significance at the regional/local level has increased.

3.5 Understanding what CCWater does

Stakeholders feel they have a good understanding of CCWater: 90% say they understand what CCWater does ‘very’ or ‘fairly’ well and there were no ‘not at all well’ responses (Figure 7).

Figure 7 Understanding of CCWater



Q5. How well would you say you understand what CCWater do? Base: all respondents (n = 105).

Primary stakeholders are the group most likely to say they understand what CCWater does ‘very well’. They report that their level of understanding is appropriate and when probed further, those who gave a ‘fairly well’ rating were happy with their level of understanding and did not feel there was any need for them to increase knowledge of CCWater’s work.

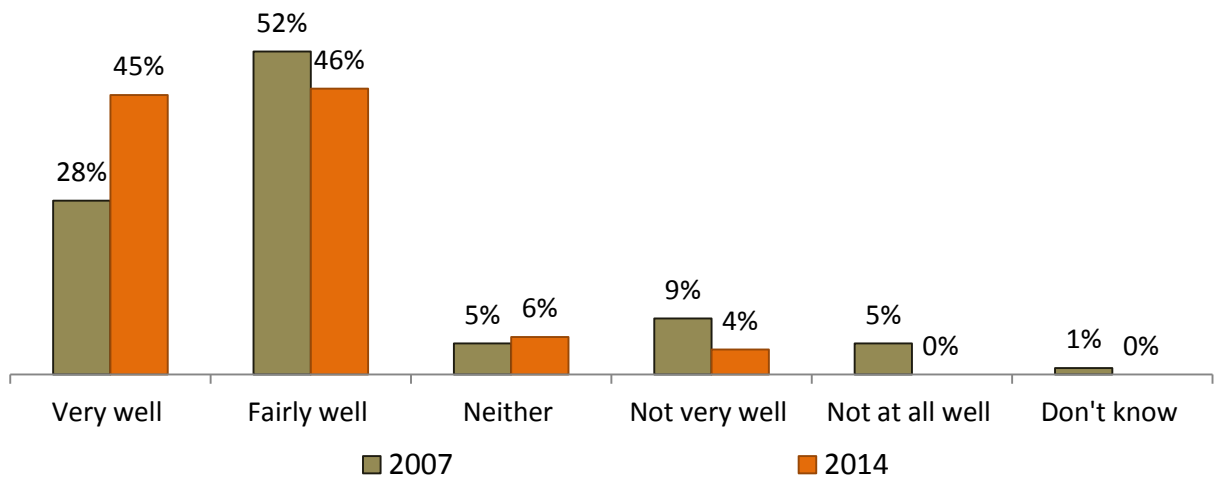
Amongst secondary and tertiary stakeholders those with a water focused role say they have a better understanding of CCWater (23 out of 52 say very well) than those for whom water is only part of their remit (5 out of 25). Tertiary stakeholders tend to feel less knowledgeable about CCWater (7 out of 31 give a ‘not very well’ or ‘neither’ response).

“There are probably things I don’t know about but I don’t need to know everything.” Primary, WoC

“I understand what their priorities are and broadly what they have achieved and how they benchmark against other customer quasi watchdog stroke regulators.” Primary, Government/Regulatory

As shown in Figure 8, understanding of what CCWater does has increased notably since 2007. There is a 10 percentage point increase in the proportion of stakeholders who say they understand what CCWater does either ‘very’ or ‘fairly well’ and this increase is significant at the 95% confidence level.

Figure 8 Understanding of CCWater – comparison to 2007



Q5. How well would you say you understand what CCWater do? Wording amended from 2007 – ‘How well do you know CCWater’? Base: all respondents 2007 (n = 100); 2014 (n = 106).

4 How is CCWater perceived?

4.1 Chapter summary

This research reveals a mixed picture in terms of how stakeholders view CCWater.

Three quarters of respondents give a satisfaction rating of between 7 and 10; stakeholders see CCWater as doing a worthwhile job and they reiterate the constructive nature of relationships with some excellent staff. The majority see its role as important, even essential; and given the monopoly status of the market, they support the need for a *water specific* consumer body.

A quarter of stakeholders feel there has been an improvement in CCWater's performance. Half think performance has stayed the same and a minority feel there has been deterioration. This data is in line with stakeholder research for other industry bodies⁹.

The data shows that CCWater is seen as *well established* and *independent* and these associations have increased from 2007 to 2014. However, being *respected by the industry* and having *policies based on research and evidence* are weaker associations.

Detailed analysis of what stakeholders think is important compared with where they see CCWater performing strongly shows there is a perception gap. For instance, the 3 of the 4 key work strands highlighted in the Forward Work Programme (*Pressing for fair and affordable charges that are value for money; Pressing the industry to ensure customers receive safe, reliable, quality drinking water and sustainable sewerage services; Pressing for services that are right first time*) are of lower importance to stakeholders.

Qualitative insight about how CCWater is performing against a dozen strands of work illustrates that stakeholders see CCWater seeking to influence in some areas that are beyond, in their view, its remit.

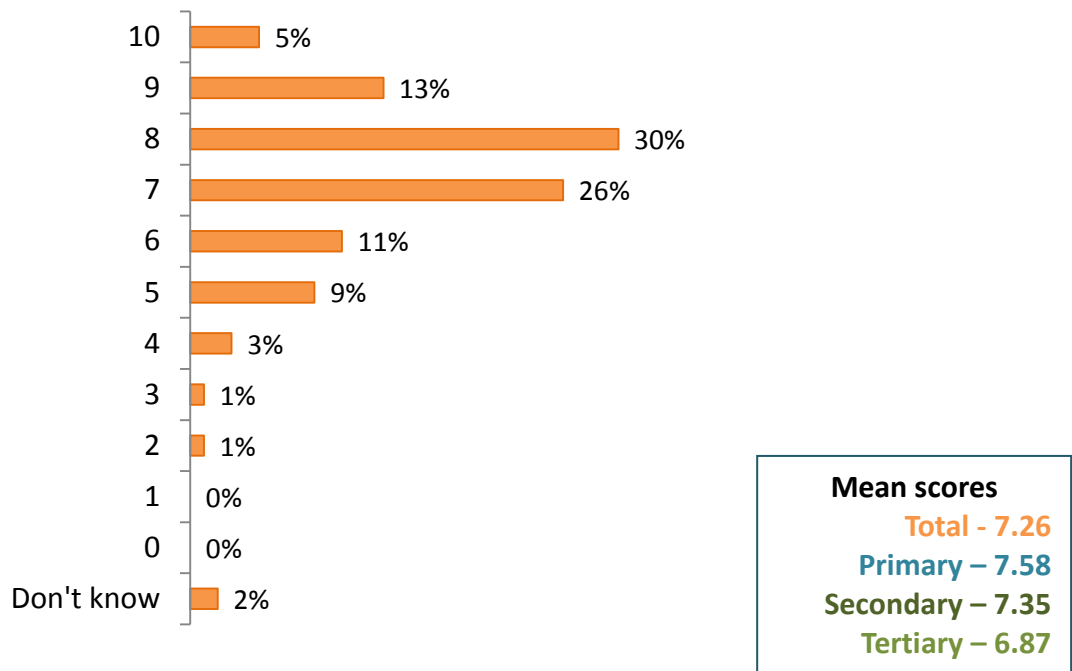
4.2 Overall satisfaction and importance

Overall satisfaction with CCWater is high with 76% of stakeholders giving an overall satisfaction rating of between 7 and 10 (Figure 9). Only a minority of stakeholders give a negative rating (5% give a rating of between 2 and 4).

Primary stakeholders are more positive and 22 out of the total 27 respondents give a rating of between 7 and 10. Tertiary respondents are more likely to give a rating of between 4 and 6 (9 out of 31).

⁹ This question resulted in very similar data to two other similar projects – one with a trade body and the other with a regional development agency – however these are not published reports.

Figure 9 Overall satisfaction with CCWater

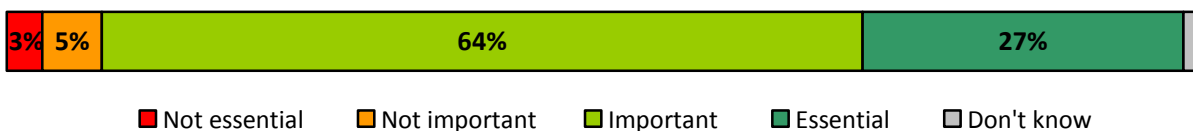


Q31. Having discussed CCWater, their strategic aims and how they communicate with you, how satisfied or dissatisfied are you with your relationship with CCWater overall? *Base: all respondents (n = 104).*

Qualitative insight revealed that CCWater is perceived to be doing a worthwhile job and stakeholders reiterated the constructive nature of relationships, excellent staff and respect for CCWater’s leadership team (when known). On the whole CCWater is also seen to have a good overall understanding of the industry and some say that satisfaction has increased as a direct result of closer working relationships established across PR14.

Two thirds of stakeholders said they see CCWater’s role as ‘important’ and 27% see it as ‘essential’ (Figure 10). Primary stakeholders are more likely to see CCWater’s role as ‘essential’ (10 out of 24).

Figure 10 Value placed on CCWater’s role



Q32. Overall, which of the following best describes how much you value CCWater's role? *Base: all respondents (n = 99).*

In the qualitative depth interviews, stakeholders discussed the importance of CCWater’s role in protecting customers given the monopoly status of the market. Due to the complexity of the water industry, stakeholders stressed the need for a *water specific*

consumer body and it was felt that a generic consumer body would not be as effective. CCWater's role in promoting improvement and positive performance was also raised. Where CCWater makes industry comparisons, companies want to compare favourably to other companies and do not want to be called on to justify themselves to CCWater – should for example, complaints begin to rise – highlighting the potential for this to drive companies to improve.

"We need something specific to water – I do value it and I would not want to see it subsumed. If CCWater was not there then the water customer would lose out." Primary, WoC

"It's important there is a place for customers to go and that customers get independent assessments of how companies are doing. It keeps us on our toes." Primary, WoC

"When you have to sit in front of them at the quarterly meetings, explaining why the complaints are higher in comparison to others in the industry. It's something you don't want to have to do and I think that process makes companies want to improve... nobody wants to be at the bottom of the pile when they put out cross industry values." Primary, WoC

4.3 Perceptions of CCWater's performance

When asked about CCWater's performance¹⁰ in the last 2 years, a quarter (26%) said there has been an improvement (Figure 11). Primary stakeholders are more likely than secondary and tertiary to say that performance has 'improved a little'. The reasons given relate to: improved partnerships and/or collaborative working; CCWater being more proactive and better at providing information; and increased visibility – both to water customers and within the industry more generally.

"They're working more closely with companies and being more open." Secondary, WoC

"They've become more proactive rather than reactive." Tertiary, Utilities

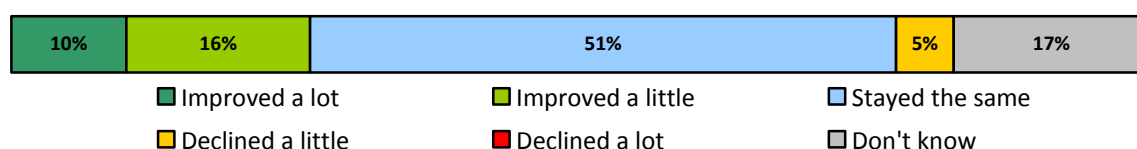
Only a minority of stakeholders think there has been a decline in performance (n = 5; 2 primary and 3 secondary/tertiary). The 2 primary stakeholders who felt there was a decline reasoned that CCWater is less visible now that meetings in public are held only annually - rather than quarterly as they were in the past. One of the secondary and tertiary stakeholders specifically criticised CCWater's role as Chair of the CCGs during PR14. The other 2 made criticisms about CCWater's lack of visibility amongst the general public.

"They're not helping the consumers enough and need to make themselves more visible."
Tertiary, Business customer group

"They lost the plot in trying to take over the chairmanships of the CCGs which took a huge amount of their Directors' time – hence they are losing direction." Secondary, CCGs

¹⁰ The term 'performance' was not qualified in the question therefore respondents were able to interpret performance in their own way.

Figure 11 Change in performance over the last 2 years



Q13. In your opinion, has the performance of CCWater improved, declined or stayed the same over the last two years? And would you say that is a little or a lot? *Base: all respondents (n = 105).*

4.4 Gap analysis: comparing importance of work strands vs. perceived performance

Stakeholders were asked to rate the importance of twelve CCWater strands of work and then to rate these according to CCWater's performance. These included the key five themes published in CCWater's Forward Programme:

- Speaking up for and informing consumers
- Pressing for fair and affordable charges that are value for money
- Pressing the industry to ensure customers receive safe, reliable, quality drinking water
- Sustainable sewerage services¹¹
- Pressing for services that are right first time

Figure 12 provides a graphical indication of how stakeholders rate the importance and then the performance of the strands of work and highlights where expectations (importance) are met by performance, and where they fall below. The graph has been plotted using the 'very important' and 'very satisfied' data.

¹¹ *Pressing the industry to ensure customers receive safe, reliable, quality drinking water and Sustainable sewerage services* were combined into one statement in the questionnaire

Figure 12 Overview: importance and performance

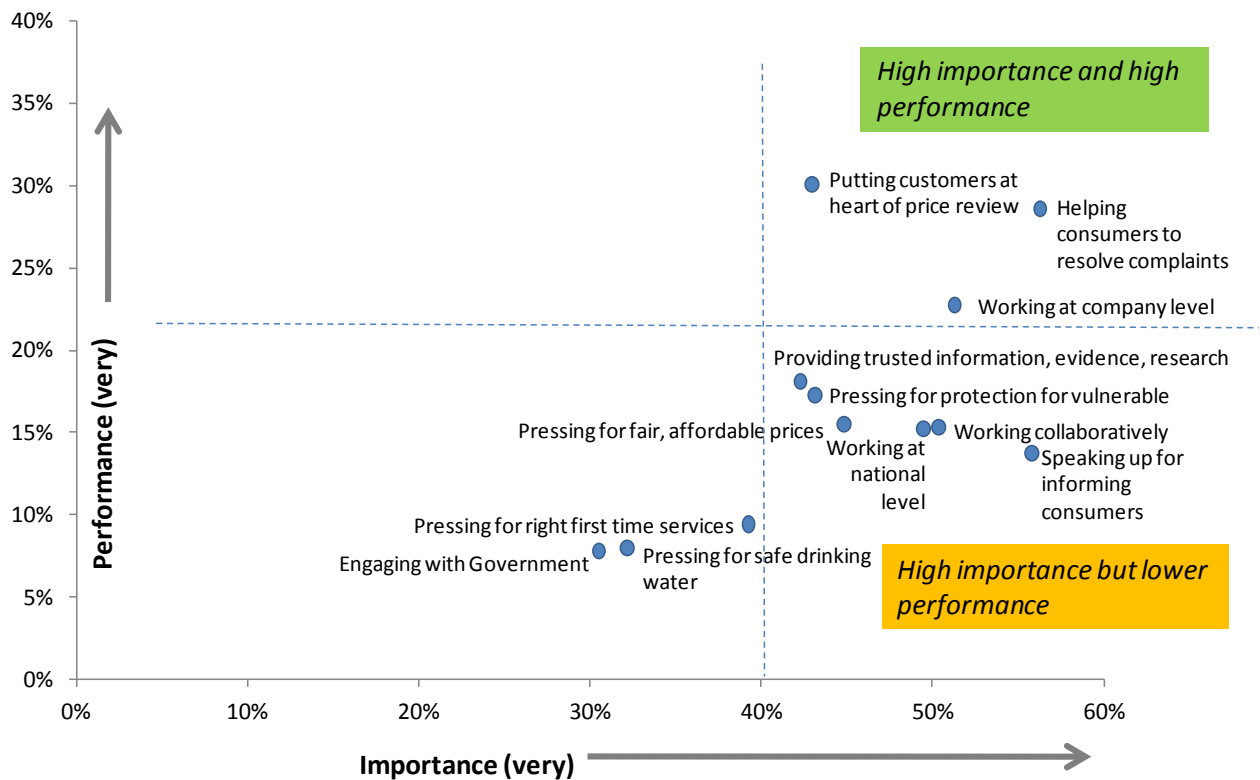


Figure 13 presents the data for importance and Figure 14 the data for performance

Helping customers with their enquiries and to resolve issues and complaints was rated the most **important** (57% give a very important rating), followed by *speaking up for and informing customers* (55% very important). CCWater's **performance** was most positively rated for *putting customers at the heart of the Price Review process* (30% very successful rating) and *helping consumers with their enquiries and to resolve issues and complaints* (29% very successful).

Each activity is discussed individually in this section. Where rankings (1st, 2nd, 3rd etc.) are referenced, this is based on the data for **very** important and **very** successful only. **Speaking up for and informing consumers** was ranked 2nd out of the twelve work strands in terms of importance. However, this activity was rated lower in the rankings for perceived performance – in equal 8th position - indicating respondents' views that there is room for improvement. Qualitatively stakeholders discussed CCWater's success at *speaking up for* consumers as evidenced during PR14. However more questioned CCWater's success in *informing* customers and did not see CCWater being active in customer facing communications. Should this survey be repeated in subsequent years it is recommended that *informing* and *speaking up for* customers are asked as separate items.

"They could do far more on the championing side and on stakeholder engagement." Primary, WaSC

Pressing for fair and affordable charges that are value for money is lower in importance - with a rank of 7th and achieves a similar ranking of equal 8th for performance. The qualitative exploration revealed that CCWater is frequently perceived to focus too much on bills and affordability, often to the exclusion of broader or longer term issues. The lower importance ranking also reflects a widely held opinion amongst primary stakeholders that the lines of responsibility are blurred between CCWater and Ofwat for this activity – and that Ofwat is ultimately responsible for fair and affordable charging.

“They tend to be more focused on value for customers being low bills versus reliable services into the future. They are unsuccessful in terms of the future interest of consumers.” Primary, Representative, professional and industry bodies

Pressing for services that are right first time is lower in importance (rank of 10th) and performance (10th). Companies see themselves as the driving force behind improving services – and not just responding to CCWater’s efforts. The phrase ‘right first time’ also suggests a more proactive, preventative approach than is associated with CCWater’s complaints role – which is perceived to be a more reactive role.

“They don’t seem to be that successful at pushing for the company to do it right first time. They are more reactive, dealing with issues once the customer has made a complaint.”
Primary, WoC

“Companies have a massive incentive to get things right first time and the added imperative of CCWater is not what drives them – they have SIM scores and imperatives around efficiency and expenditure and incentives. The way we achieve this is by getting things right first time.”
Primary, WaSC

Pressing for safe, reliable, quality drinking water and sustainable sewerage services was the strand of work most likely to be rated as *not important* (ranking 11th). Drinking water and sewerage are not seen as core to the role of CCWater. Instead, these activities are the responsibility of EA, DWI and Ofwat. Consequently performance was also rated at the bottom end of the scale (11th).

“This is not what they’re responsible for – it’s for DWI, EA and Ofwat – problems form when organisations take responsibility for things that aren’t theirs to do so. It leads to confusion and conflict.” Primary, Government/Regulatory

“There are other regulators there to do that and I don’t understand why CCWater would get involved with that – we have DWI and EA to manage this. It is not part of CCWater’s role and duplicates the role of others.” Primary, WaSC

Working at company (3rd) and national level (5th) are both felt to be important – though performance is higher at the company level (23% very successful; ranking 3rd) compared to national (16%; ranking 6th). It is clear that a real strength of CCWater’s is in company level relationships. For many stakeholders – especially in the secondary and tertiary categories - there is a lack of visibility of CCWater working at the national level. Primary stakeholders are more in touch with CCWater’s central function and are more likely to endorse the need for a strong national voice and a national agenda.

“Nationally they’ve struggled a bit to work with the industry to the extent that they have locally. They have worked on bigger issues and it comes back to bills rather than the whole package.” Primary, WoC

“They need to make their activities at a national level more visible, being stronger in the national policy environment, more visibly influencing other stakeholders on policy issues.”
Primary, WaSC

Providing trusted information, evidence and research was rated 9th for importance and 4th for performance. Though information is felt to be accessible, primary stakeholders often have concerns about the design and purpose of research and this sometimes undermines CCWater’s credibility. The quality of CCWater’s research output is a key theme within this report and is discussed in more detail in Section 6.4.2.

“Frankly some of the survey information they published as part of the Price Review wasn’t very good and it wasn’t trusted or supported as much as research that companies did themselves.” Primary, WoC

Putting customers at the heart of the Price Review process receives the highest overall success rating (1st) and is ranked 6th for importance – indicating that CCWater is investing more into this work strand than is expected or desired by stakeholders. PR14 has certainly increased CCWater’s visibility across the industry. However, Ofwat is seen as the primary influencer in prioritising the customer agenda in the Price Review - not CCWater – and it is also perceived that companies have responded well in embracing customer engagement. Some primary stakeholders criticise the literal way CCWater has used customer research in the Price Review process and while acknowledging the importance of the customer viewpoint, want to see these often *uninformed views* balanced alongside the informed or *expert views* e.g. of the industry and its stakeholders.

“They failed to understand that putting customers at the heart of the process does not mean they controlled it... This has not been understood by CCWater.” Primary, WoC

Helping customers with their enquiries, issues and complaints was the highest rated work strand in terms of importance (ranking 1st; 57% very important). Stakeholder’s performance rating was also high (2nd). Dealing with complaints and enquires from the public is frequently seen as CCWater’s ‘*bread and butter*’ or primary role.

“If the customer has exhausted the company’s complaints process it is important that CCWater take it on.” Primary, WaSC

However, given that firstly, customer complaints are decreasing and secondly, a new alternative dispute resolution service is imminent, some primary stakeholders felt that there may be less of a complaints handling role for CCWater in the future.

Protecting and helping vulnerable customers is seen as a key role for CCWater and although ranked 8th for importance, it rises to 5th for performance. Qualitative probing reveals that the wording of the question can imply that without CCWater's interventions, the industry would neglect to protect vulnerable customers – which many stakeholders, particularly water companies, refute. This is another work strand that some question in relation to Ofwat's role and potential overlap of responsibilities.¹²

"It's about the individual company's policy and approach. They can make a lot of noise about it but their efforts could be utilised better." Primary, WaSc

"They would not have to press us to do this. Water companies already recognise the importance of doing this. We do an incredible amount for vulnerable customers and I do not agree with the premise that we need to be pressed." Primary, WaSc

Working collaboratively with stakeholders is ranked the 4th most important activity but performance drops to 8th in the rankings suggesting there is room for improving collaborative working.

"To be really effective [at collaborating] they need to understand that it's about more than just talking about the customer and their bills, is about educating the customer as well."
Primary, Government/Regulatory

"This is what I would prefer them to be doing. It's very important. They have a role in working collaboratively with us and with other consumer organisations and this is more important than the regulatory relationship. We share objectives a lot of the time." Primary, WaSc

Engaging with the Government was ranked last in terms of importance within the sample as a whole, and for performance it was ranked equal 11th (although the high proportion of don't know responses are notable here). Qualitatively, engaging with the Government emerged as a much more significant theme for Primary stakeholders than the survey data suggests. This is not an area in which CCWater is perceived to be active and the policy focus of CCWater is not well understood. A lack of profile in the policy making arena is having a negative impact on how primary stakeholders see CCWater in terms of its strategic influence and authority as a consumer advocate.

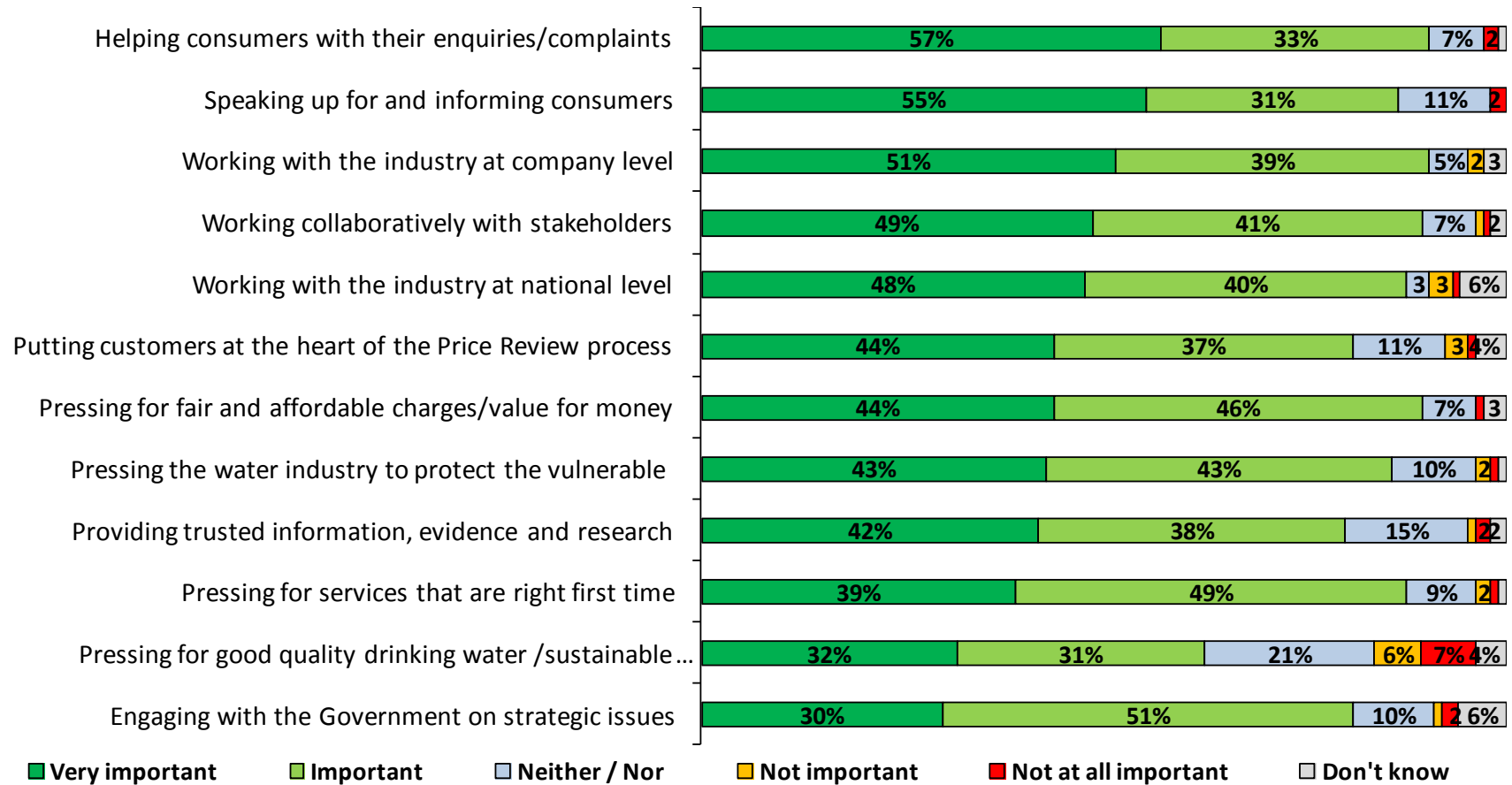
"They have had no influence with the Government. That's one where they have not been so successful. Definitely a lot more attention is paid to Ofwat. This may be constrained by the fact their own position is up in the air a bit so they don't want to rattle the cage too much."
Primary, WoC

"To have authority they have to be really well known and have influence at a higher level - in the Government. At the moment I'm not sure they do." Primary, WoC

¹² Under the Water Industry Act 1991 (as amended by the Water Act 2003) CCWater have regard to the interests of: Individuals who are disabled or chronically sick; Individuals of pensionable age; Individuals on low incomes; Individuals residing in rural areas; Consumers who are ineligible to change their water supplier

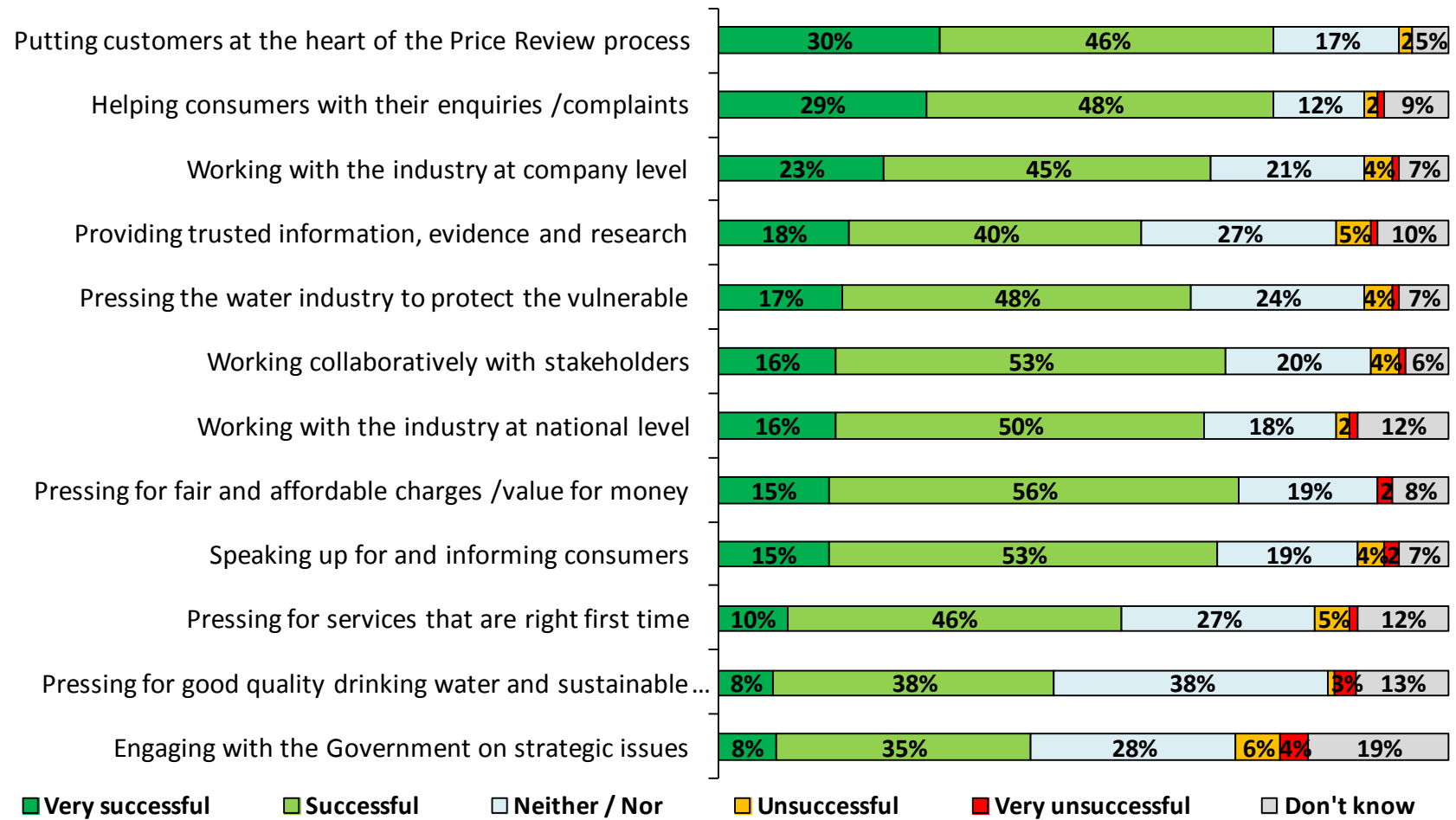
“Some companies are quite dismissive of them. I think partly because of the axe hanging over them. If you’re being supported and lauded by the government that gives you a lot more authority so some of it is outside their control.” Primary, WoC

Figure 13 Importance of work strands



Q11. We want to understand what you as a stakeholder think the role of CCWater should be... how important do you think each of the following are for CCWater in its role as a consumer representative? Base: all respondents (n = 100-105).

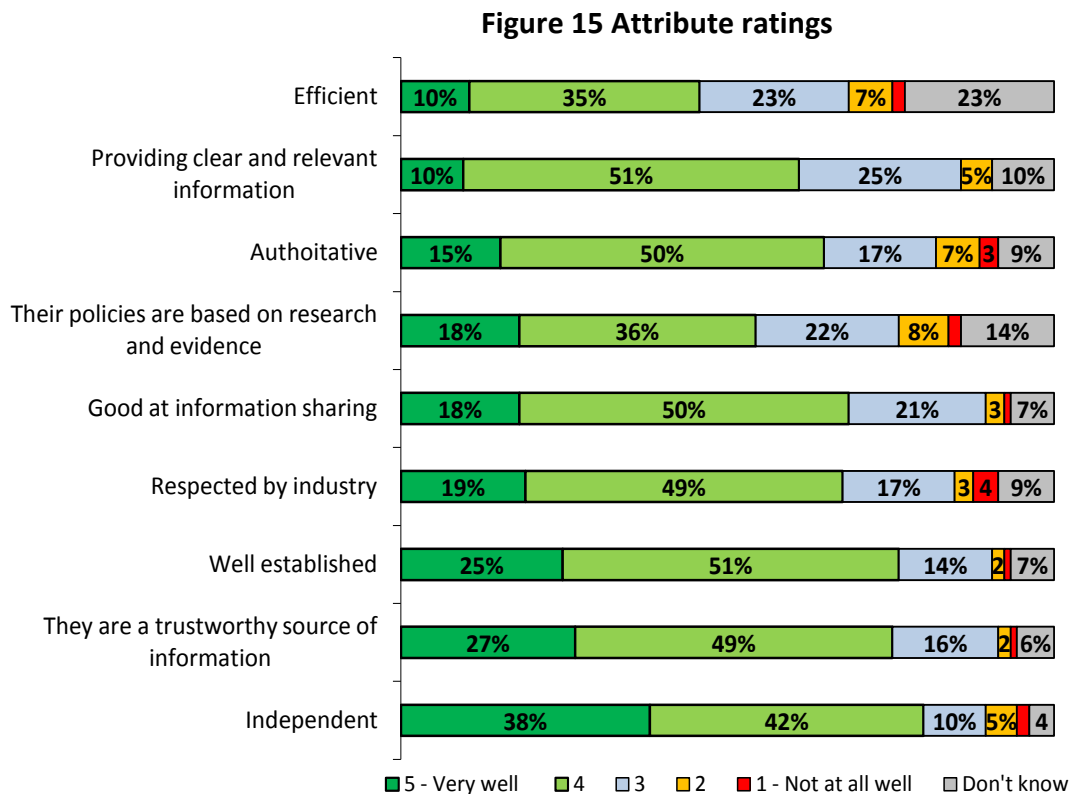
Figure 14 Performance of work strands



Q12. And how well do you think CCWater is performing here? Base: all respondents (n = 100-105).

4.5 Attributes about CCWater

Figure 15 presents stakeholders ratings of different attributes about CCWater.



Q14. Thinking about CCWater generally how would you rate them on the following attributes where 1 is not at all and 5 is very well? Base: all respondents (n = 105).

CCWater perform most strongly against the attributes ‘well established’ (76% well or very well) and ‘independent’ (80% well or very well). Many stakeholders cannot comment on ‘efficient’ (23% say they don’t know) – qualitatively, stakeholders found it difficult to make a judgement without understanding more about its operational set up.

“They are very careful about that [about the attribute independent]. Sometimes they are self-righteous about it.” Primary, Government/Regulatory

“They are highly professional but I’m less sure about thorough and efficient. I’m not sure they always focus on the right things – it is so all-encompassing and I wonder if perhaps they should focus on the bigger more strategic things. They are quite detail orientated.” Primary, WaSC

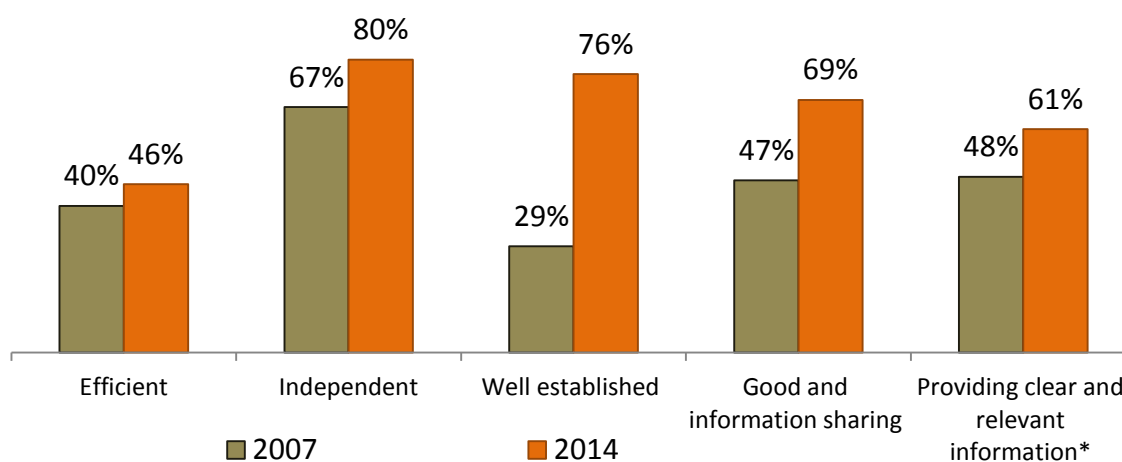
In total, 68% of stakeholders say CCWater is *good at information sharing* whereas describing CCWater as *having policies that are based on research and evidence* received the lowest proportion of well/very well ratings (54%).

Qualitatively, stakeholders say that CCWater could be more proactive about sharing information (sometimes discovering reports rather than being signposted to them). As mentioned previously specific issues about the quality of CCWater’s research and evidence are discussed further in Section 6.4.2.

“They could do more – I know where to go to get this info and I know my way about the website but I have to go and actively look for this – it is not actively shared.” Primary, Government/Regulatory

A number of these attributes were measured in the 2007 research. There have been clear increases in the proportion of ‘very’ and ‘quite well’ responses to all 5 tracking metrics between 2007 and 2014 (Figure 16).

Figure 16 Attribute ratings – comparison to 2007

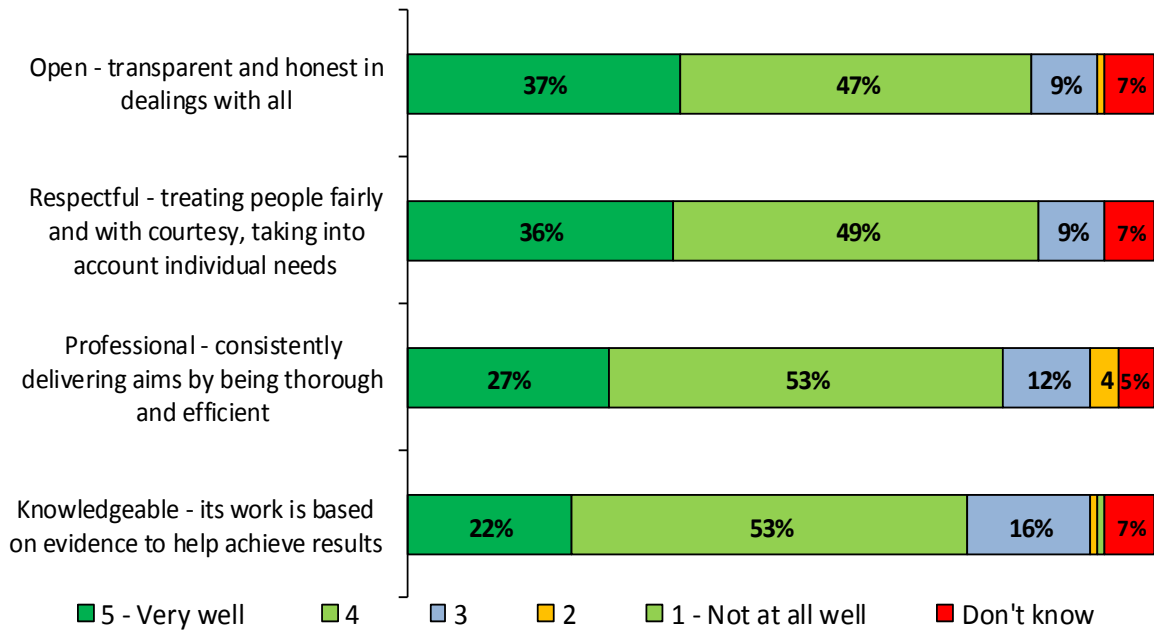


Q14. Thinking about CCWater generally how would you rate them on the following attributes where 1 is not at all and 5 is very well? Base: all respondents 2007 (n = 100); 2014 (n = 106). Chart shows % saying ‘well’ and ‘very well’.

4.6 Performance against CCWater’s corporate values

Stakeholder ratings of CCWater’s performance for each of their corporate values are high - with ‘Open’ and ‘Respectful’ receiving the highest proportion of positive responses (Figure 16). The value ‘Professional’ receives 4 negative ratings – 3 of which are from primary stakeholders (1 tertiary) and 3 from themes other than water. As might be expected, tertiary stakeholders are consistently more likely to give a ‘don’t know’ response.

Figure 17 CCWater's corporate values



Q15. On a scale of 1 to 5, where 1 is not at all well and 5 is very well, how would you rate CCWater's performance in working in accordance with each of the following of their values? Base: all respondents (n = 105).

5 Communications

5.1 Chapter summary

Overall, stakeholders made little criticism of the way CCWater communicates with them: the majority feel informed about CCWater’s work and the amount of information they receive is ‘about right’. CCWater is perceived to understand its stakeholders’ organisations and is successful in targeting the right people.

Stakeholders, in commenting on various aspects of CCWater’s communications, have highlighted the importance of having personal, one-on-one relationships, and this is particularly true of primary stakeholders. This is why face-to-face and/or telephone are rated the most important communication channels.

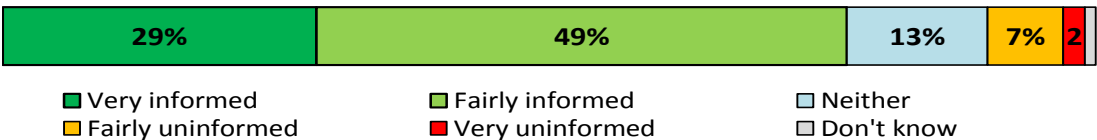
While stakeholders find it difficult to recall specific reports unless prompted, it is clear that most are aware of several of CCWater’s publications and/or projects and activities, and this is particularly so in relation to its role in the Price Review process. Indeed, reflecting an interest in keeping abreast of new reports, stakeholders are most likely to notice ‘blanket’ stakeholder emails and publications. Those who do receive *On Tap* give it a positive rating and stakeholders in the main are engaging with the Forward Work Programme consultation.

5.2 Receipt of information

As shown in Figure 18 and Figure 18, the majority of stakeholders feel informed about CCWater’s work and that the amount of information they receive is ‘about right’ (or if anything, too little). There is a correlation between feeling informed and the amount of information received with stakeholders who feel they receive too little information also tending to feel less informed.

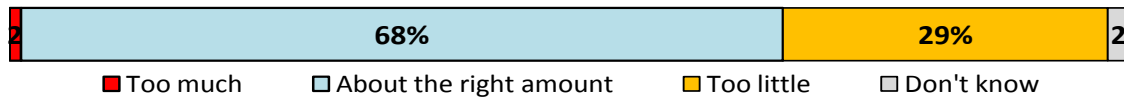
Primary stakeholders are also more likely to say they feel informed when compared to secondary and tertiary stakeholders and furthermore this latter group are more likely to say they get ‘too little’ information from CCWater.

Figure 18 Feeling informed



Q17. Overall how well informed do you feel about the work of CCWater? Base: all respondents (n = 105)

Figure 19 Amount of information received

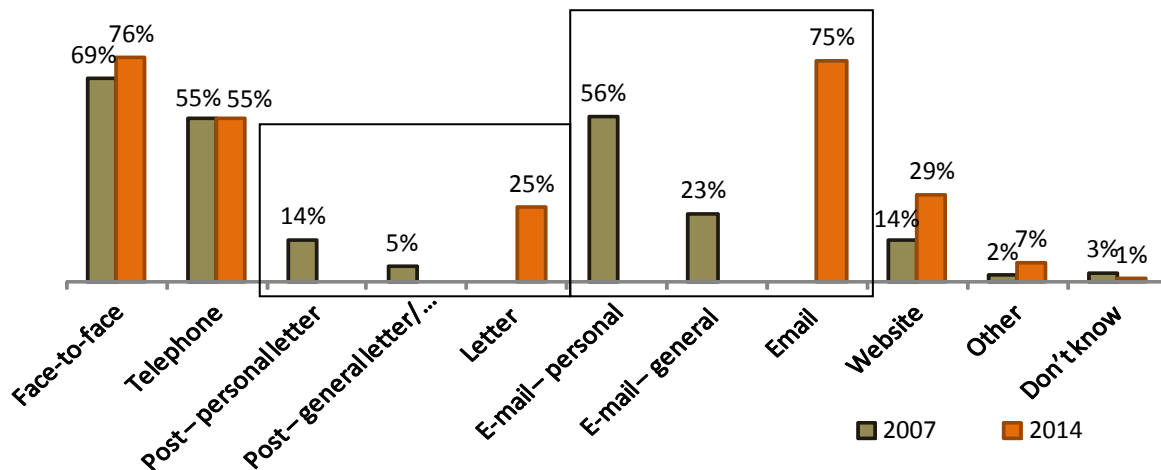


Q18. Would you say you receive too much, about the right amount or too little information from CCWater? *Base: all respondents (n = 104).*

5.3 Communication channels

As Figure 20 shows, stakeholders expect to engage with CCWater either face-to-face and/or over the phone. This was particularly apparent amongst primary stakeholders who desire personal one-on-one relationships. Stakeholders are also open to email communications and the data is broadly similar to that observed in 2007.

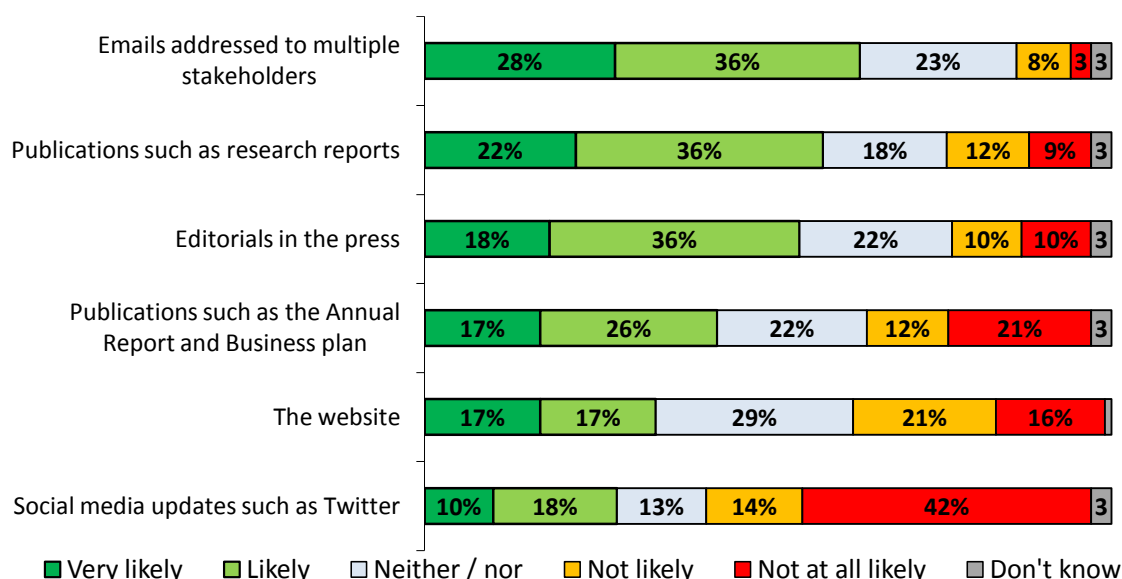
Figure 20 Communication channels



Q.2007. How would your organisation like to engage with CCWater? *Base: all respondents 2007 (n = 100); Q30.2014. How would you (or your organisation) prefer to engage with CCWater? *Base: all respondents (n = 92).**

Emails addressed to multiple stakeholders and publications such as research reports are most likely to receive stakeholder attention (Figure 20). Social media updates such as Twitter, by contrast, are given the least attention.

Figure 21 Likelihood to notice types of communication from CCWater

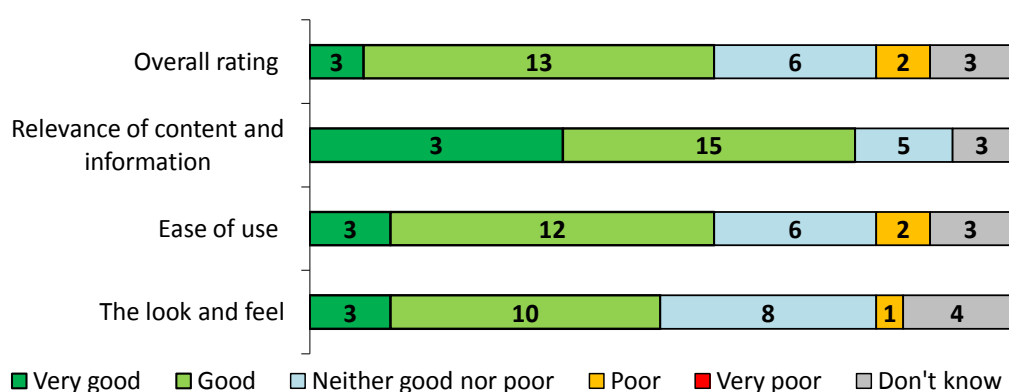


Q20. How likely are you to take notice of the following types of communication from CCWater? Base: secondary and tertiary stakeholders (n = 77 except 'Emails addresses to multiple stakeholders' n = 75 as modified after the pilot) ***Low base sizes.**

5.4 The website

The 34% of respondents (n = 26) who said they are likely to take notice of the website were asked some further questions (Figure 21). Half of these (n = 13) rated the website as 'good' overall. Stakeholders familiar with the website are most positive about the relevance of content and information and least positive about its look and feel. There was little qualitative insight about the website due to very infrequent use amongst primary stakeholders. The website is mostly used to access reports – often accessed via a link from an email.

Figure 22 Website ratings



Q21A. How would you rate CCWater's web site overall? Base: secondary and tertiary stakeholders likely to notice the website (n = 26). **Q21B. How do you rate the website on...?** Base: secondary and tertiary stakeholders likely to notice the website (n = 26) ***Low base sizes.**

5.5 E-bulletin - On Tap

Just under a third (30%) of stakeholders say they receive On Tap and this is higher amongst primary stakeholders (11/28). Most of those who receive On Tap rate it ‘good’ or ‘very good’ and most do take notice of it when it arrives (16/20; Figure 22).

“I’ve been getting it for years and do usually read it. I skim it for the bits that are relevant – rather than reading every word. I think that it is very good.” Primary, Government/Regulatory

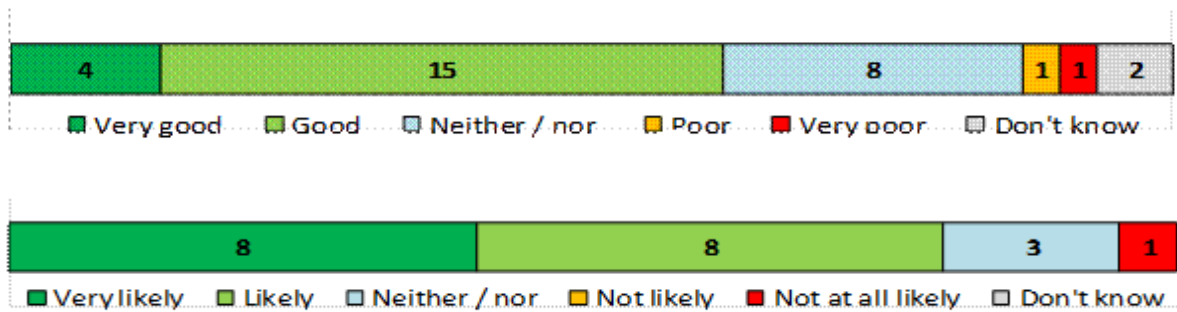
Just two respondents made negative comments about On Tap, specifically:

“I scan it. It feels more 6 monthly than quarterly. It could be more forward thinking.” Primary, WaSC

“It should be interesting but it isn’t and it’s not stimulating.” Tertiary, WoC

A number of primary stakeholders who are not aware of On Tap showed interest in receiving regular updates. However an e-bulletin was not thought to be appropriate as the primary channel of communication and stakeholders would expect to hear about e.g. report publications or other information from CCWater directly, either via their main contact point or at quarterly meetings.

Figure 23 On Tap: Overall ratings (a) and likelihood to notice (b)

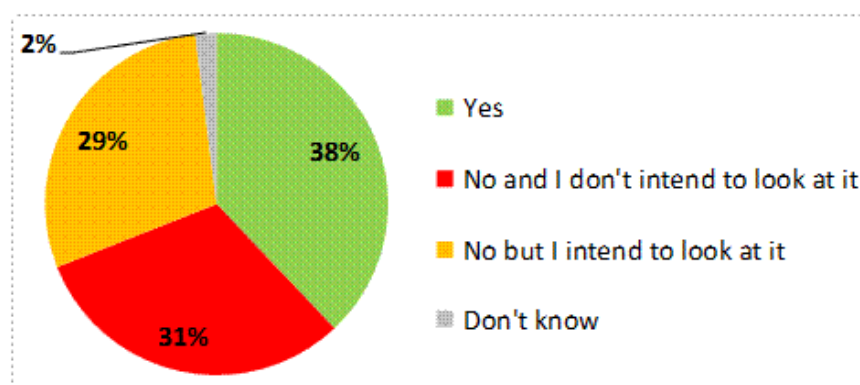


Q19a. How would you rate On Tap? Base: respondents who receive On Tap (n = 31); Q20. How likely are you to take notice of On Tap? Base: secondary and tertiary respondents who receive On Tap (n = 20) *Low base sizes.

5.6 Forward Work Programme

Almost two thirds (59%) of stakeholders are aware that the Forward Work Programme was recently sent out for consultation (Figure 23). This was much higher amongst primary stakeholders (90%).

Figure 24 Receipt of Forward Work Programme



Q24A. Have you looked at this document/do you intend to look at it? *Base: Respondents aware of the consultation (n = 58). *Low base sizes.*

Amongst those who are aware of this consultation, 22 (out of 58) had looked at the documentation and a further 17 intended to do so. Of the 39 stakeholders who had looked or intended to look at the Forward Work Programme, 14 intended to respond. There are 19 stakeholders who said they did not plan to respond to the consultation. The main reasons for this are:

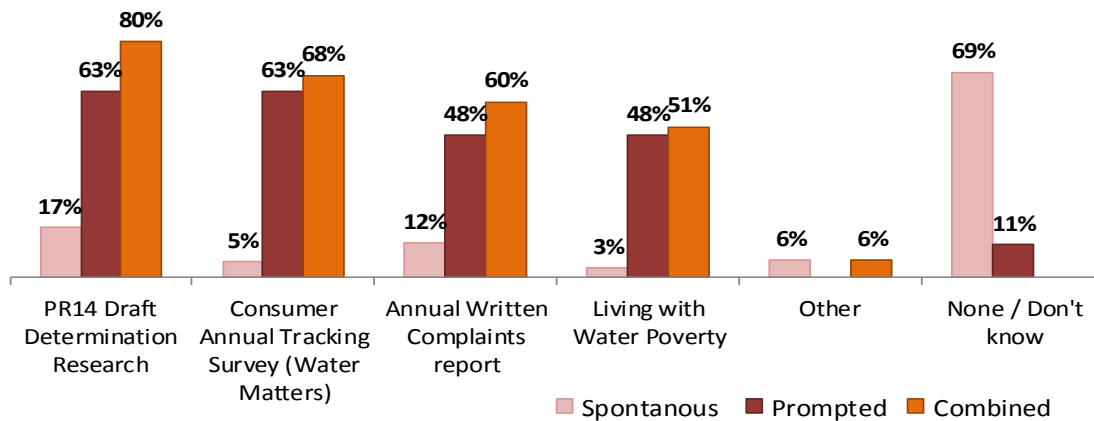
- No need as happy with the content
- Insufficient time/too busy
- Not relevant/other priorities/not interested
- Not appropriate to respond (this comment came from Government/Regulators)
- Responsibility for responding is delegated to someone else in the organisation
- Will make no difference/impact (1 response – secondary, representative, professional and industry bodies)

Government/Regulator stakeholders also made the point that they would expect to be consulted about the content of the Forward Work Programme earlier in the process, rather than being consulted in the same way as industry stakeholders.

5.7 CCWater reports, projects and activities

There is low spontaneous awareness of CCWater reports (i.e. when stakeholders are asked whether they can name reports 'off the top of their head' without prompting) (Figure 24). Primary stakeholders however, are more likely to spontaneously name research reports than secondary and tertiary stakeholders. Furthermore, when prompted with the report titles most stakeholders are aware of recent CCWater reports – most commonly the PR14 Draft Determination Research. Only 11% of stakeholders are not aware of any of the 4 reports that were prompted and a number of other reports are recalled spontaneously (e.g. Threshold for acceptability, Management accounts, Cost of drain blockages).

Figure 25 Recall of CCWater reports and publications

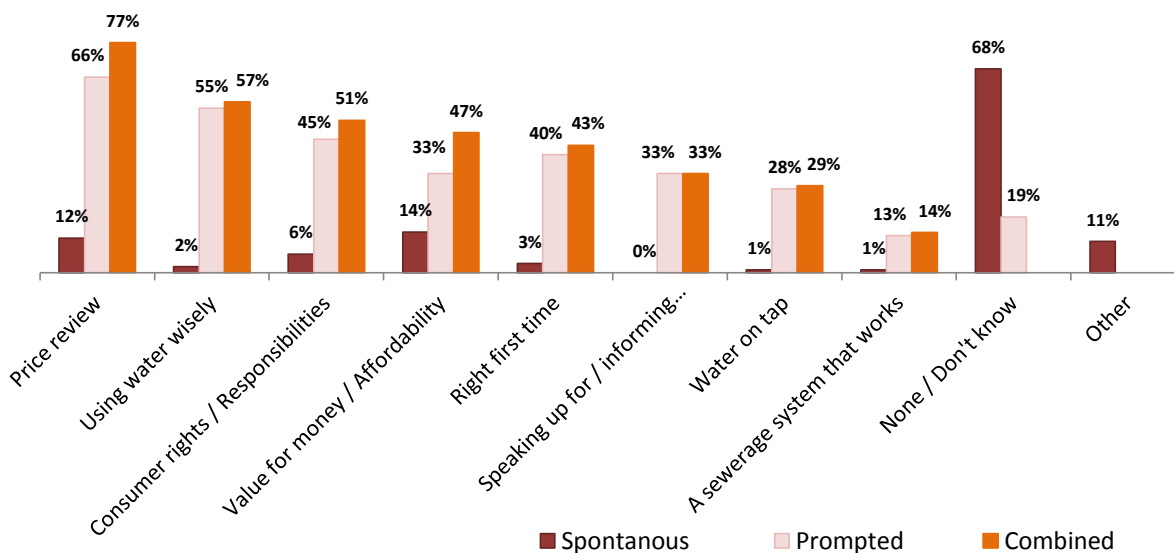


Q23A. Are you aware of any CCWater recently published CCWater reports? Base: all respondents (n = 95). **Q23B. Have you heard of any of the following reports?** Base: all respondents (n = 95).

Similarly, there are relatively low levels of spontaneous awareness of CCWater projects and activities (Figure 26), with primary stakeholders having the highest recall. When prompted, most stakeholders are aware of at least some of these projects and activities: the Price Review process having the highest levels of combined (spontaneous and prompted) awareness (77%).

Qualitative insight also reveals that although many primary stakeholders had heard of some of these activities they did not necessarily associate them with CCWater. A good example is *Using water wisely* which is commonly associated with the water companies themselves and not with CCWater specifically.

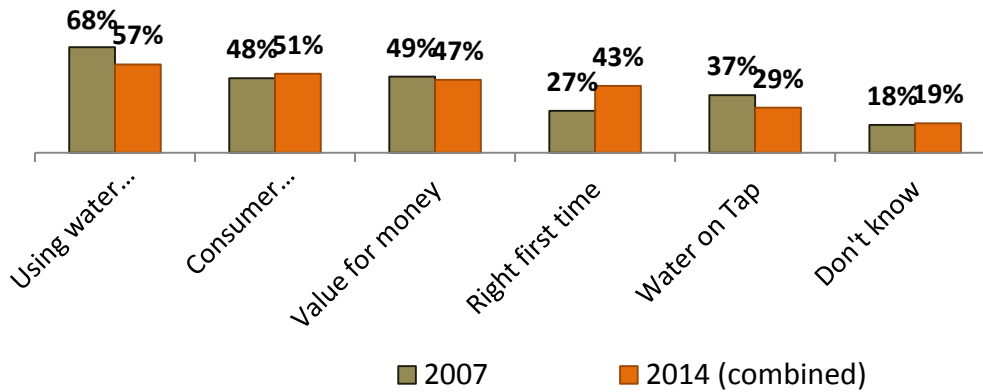
Figure 26 Recall of CCWater projects and activities



Q22A. What CCWater projects or activities are you or your organisation aware of? Base: all respondents (n = 95). **Q22B. Have you heard of any of the following projects or activities?** Base: all respondents (n = 95).

Figure 26 shows how awareness of CCWater's projects and activities compares to the 2007 data. Though there are lower levels of awareness of *Using Water Wisely* and *Water On Tap* in comparison to 2007, awareness of Right First Time in contrast, has increased¹³.

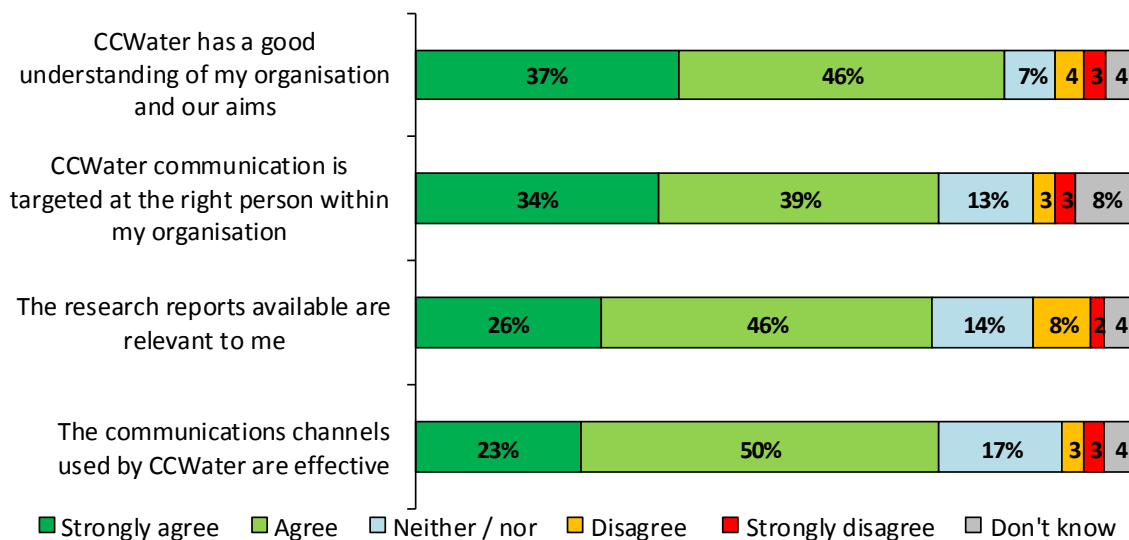
Figure 27 Recall of CCWater projects and activities: comparison to 2007



2007. What CCWater projects or campaigns are you or your organisation aware of? Base: all respondents 2007 (n = 100);
2014. Have you heard of any of the following projects or activities? Base: all respondents (n = 95).

Overall attitudes to CCWater's communications are shown in Figure 28. Stakeholders are generally positive about CCWater's communications particularly in terms of its understanding of stakeholder organisations and for targeting the right people.

Figure 28 CCWater communications



Q25. Where 1 is strongly disagree and 5 is strongly agree, to what extent do you agree or disagree with the following statements about CCWater's communications with stakeholders? Base: all respondents (n = 104).

¹³ Using Water Wisely was probably higher in 2007 owing to CCWater's activity in response to the 2 year drought due to low rainfall in winter in the preceding years.

6 CCWater Role and Positioning

6.1 Chapter summary

Just over three-quarters of stakeholders (77%) think that CCWater is fairly or very effective as a consumer advocate. However, insight from the qualitative investigation with primary stakeholders reveals a more complex picture about the way stakeholders view CCWater as a consumer advocate.

CCWater is perceived to play three roles: a complaints resolver, an industry challenger (i.e. during PR14 and with quarterly reporting); and a consumer advocate. Primary stakeholders voice concern about the balance of these roles and specifically that the challenger role is too dominant and the advocacy role needs further development.

A number of commonly voiced themes are also shaping stakeholder perceptions: CCWater is not operating from a position of strength and its relationship with Ofwat is poor; it takes the credit for successes they only play a part in; by spreading its role too thinly it can appear to be out of depth or lacking expertise; some of its behaviours can undermine its reputation and influence (and are at odds with the advocacy role).

The in-depth discussions with primary stakeholders reveal a frustration about how CCWater is positioning itself in the industry. Government and regulatory stakeholders do not see CCWater leading the consumer agenda in the policy setting arena and stakeholders across all categories (primary, secondary and tertiary) are less aware of CCWater's role in influencing Government. Stakeholders from water companies are also looking to CCWater to apply its broader advocacy role and to work more collaboratively with the industry: currently CCWater's regulatory style of behaviour acts as a barrier to closer, collaborative working.

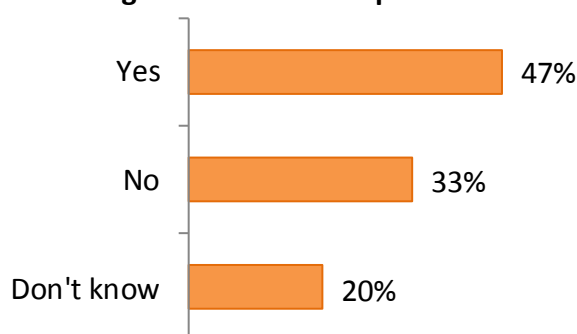
Stakeholders appear to give contradictory views about the level of profile CCWater needs to be effective. The current (low profile) strategy of signposting water customers via bills and telephone directories is appropriate when CCWater is acting as a complaints resolver. However, many stakeholders want to see CCWater strengthening its advocacy role and believe it would be more effective in this role if it had a higher profile e.g. in the media.

6.2 Profile with consumers

When asked whether CCWater has a strong enough profile with consumers to do their job adequately, almost half of secondary and tertiary stakeholders agreed (Figure 28; this question not asked of primary stakeholders).

Those who say their role has a water industry remit (at Q3) were more likely to give a yes response (50%; 26 out of 52) than those say their role has a broader remit of which water is one element (40%; 10 out of 25).

Figure 29 CCWater's profile with consumers



Q7. Do you think CCWater has enough of a profile with consumers to do their job adequately? *Base: secondary and tertiary respondents (n = 77). *Low base size*

The third who do not think CCWater has enough of a profile with consumers to do their job adequately mentioned issues such as the confusion with Ofwat, its low profile at a local level, as well as general reflections on how uninformed water customers are. Additionally, the sign posting approach was not felt to be appropriate for all customers e.g. non English speakers or vulnerable people who are falling into debt.

"They're battling against Ofwat. There are too many regulators." Secondary, WoC

"I think they aren't well known with clients, whether it's because they are constrained by budgets. They help customers and they are a good thing and they are needed but not well known" Secondary, WoC

"I don't think the public have an understanding of how the water system works and need to be informed better." Secondary, Consumer and charity

"They need to be more proactive and engage in different channels. For some people English is their second language and they do not understand how or where they can get help, others will not open their bills to read the info. They are scared because they have no money to pay."
Secondary, Representative, professional and industry bodies

All stakeholders were presented with a statement about CCWater's signposting approach (below) and asked whether they agreed or disagreed with it (Figure 29).

CCWater aims to ensure that consumers who need their help or advice are signposted to them - particularly when they have exhausted their water company's complaint procedure - rather than trying to raise awareness generally. CCWater's contact information is available in water companies' complaints leaflets, on their website and appears on the back of almost all companies' water bills and in the Yellow Pages.

Figure 30 Signposting approach



Q8. To what extent do you agree or disagree with this approach of signposting? *Base: all respondents (n = 105).*

The majority of stakeholders agree with maintaining a low profile via signposting (87%) while a small number disagree with the signposting approach. In the qualitative discussions, however, many stakeholders who agreed with the signposting approach also stressed the need for greater visibility to enable customers to find help more easily.

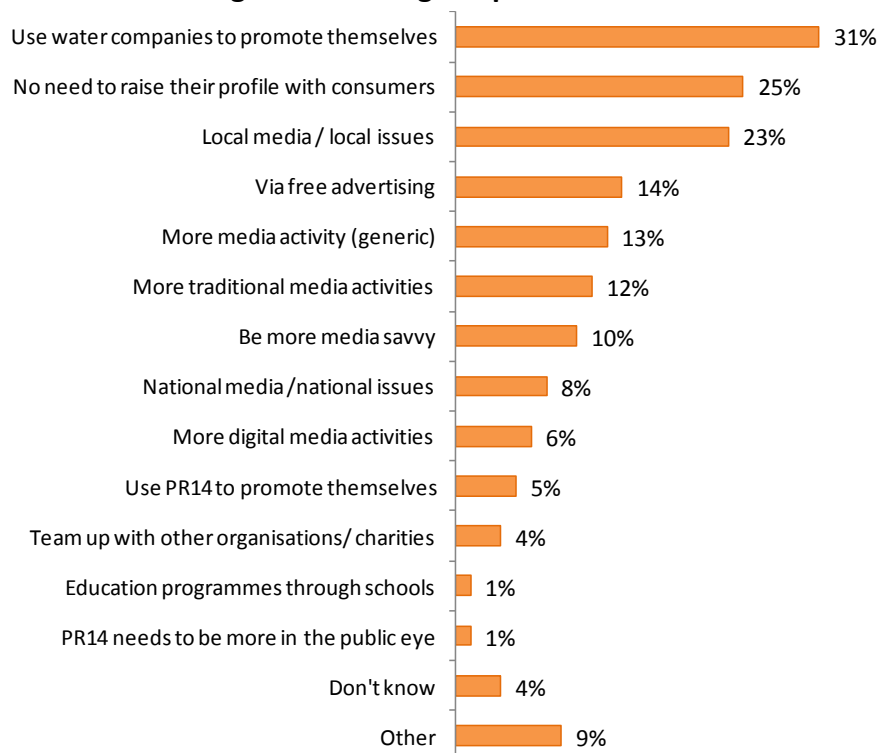
These contradictions point to more complex attitudes stakeholders hold about the type of profile CCWater should have. Approximately a fifth of all stakeholders agree with the low level signposting strategy while simultaneously saying that CCWater does not have enough of a profile to do their job adequately. The primary stakeholder interviews shed light on the issue of profile: signposting is appropriate when CCWater is acting as a complaints resolver, however many want to see CCWater having a higher profile in its advocacy role – in which case the signposting strategy looks inadequate. This point is discussed further in the following section.

Figure 30 shows how stakeholders think CCWater should go about raising its profile with customers and consumers. Echoing the data from the previous questions, a quarter of stakeholders reiterate that there is no need to raise the profile of CCWater. Around a third (31%) say that promotion should be via the water companies and in total 34% suggested the media in some form (this percentage reflects combined mentions within which local media was mentioned most often - 25% of mentions). The 'other' comments included:

- Improving the website
- Getting out into the community more
- Working with organisations such as the Citizens' Advice Bureaux (CAB) to make themselves more visible to the less fortunate
- Marketing to trade associations
- Partnering with other organisations and improving local connections

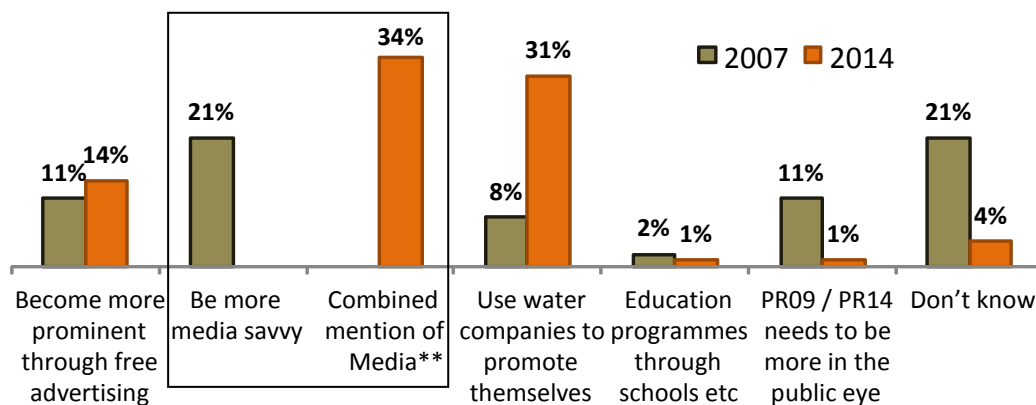
Where possible this data is also compared to 2007 in Figure 31. As shown, there is an increase in the number of stakeholders who refer to use of the media and in the number of stakeholders who suggest CCWater should use the water companies to promote itself.

Figure 31 Raising the profile of CCWater



Q9. If CCWater were to raise its profile with consumers, how do you think they should go about this? *Base: secondary and tertiary respondents (n = 77). *Low base sizes.*

Figure 32 Raising the profile of CCWater – in comparison to 2007



2014 Q9. If CCWater were to raise its profile with consumers, how do you think they should go about this? *Base: secondary and tertiary respondents (n = 77); 2007 Q. How could it be improved [the profile]? Base: respondents who said CCWater was not well known (n = 63). Item 'Doesn't need to be improved / do not need to raise profile' is excluded as it is not comparable.*

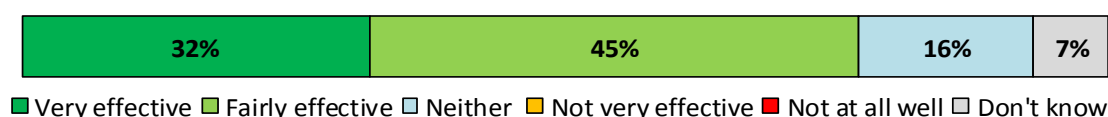
*** Combined mentions calculated on proportion mentioning any media related pre-codes.*

***Low base sizes.**

6.3 Role as a consumer advocate

Just over three-quarters of stakeholders (77%) think that CCWater is fairly or very effective as a consumer advocate (Figure 33). Primary stakeholders are a little more positive as are respondents who say water is the primary focus of their role. Secondary and tertiary stakeholders, by contrast, are more likely to say 'don't know'.

Figure 33 CCWater's effectiveness as a consumer advocate



Q10. How effective do you think CCWater is as a consumer advocate? Base: all respondents (n = 105).

While it is encouraging that three quarters of stakeholders rate CCWater as effective as an advocate, the insight from the qualitative investigation with primary stakeholders reveals a more complex picture about the way stakeholders view CCWater as a consumer advocate. There are a number of issues at play:

Multiple definitions of the 'consumer advocate' role: the responses to this question tended to reflect stakeholders' views of the advocacy role in its broadest sense. For example, stakeholders could interpret the advocacy role as either: CCWater's role in resolving complaints; or CCWater's participation in the Price Review process; or CCWater's wider advocacy role informing and influencing policy with Government and the industry more generally. While some stakeholders had only one of these roles in mind (e.g. complaints resolution), others were familiar with more than one of these roles - and it was common for these stakeholders to see CCWater as acting more effectively in one area than in another. Hence, when answering the survey question, stakeholders tended to give a positive rating for an aspect of the advocacy role they regard as effective and follow this with comment about where CCWater's advocacy is less effective.

Effectiveness ratings take the wider context into account: when answering this question, stakeholders often reflected on their wider contextual beliefs; for instance rating CCWater on its effectiveness in *the context of straightened budgets and resources*; or in the context of its *uncertain future*.

Primary stakeholder survey scores were often more positive than discussions would suggest: During the depth interviews it was observed that many primary stakeholders wanted to comment on or discuss CCWater's strategic role in the industry – however, the limitations of a structured survey meant their message to CCWater is not conveyed in the headline scores. When analysing the survey scores with the qualitative insight from primary stakeholders, the positive ratings appear to reflect good effort more than good performance (rather like some school reports where effort is affirmed with high grades while the need for improvement is couched in sentences). This is illustrated by the following verbatim showing a stakeholder giving a positive rating but delivered with critical commentary:

"[I'll give them 9 out of 10] because they don't fully understand the business. ... I don't think they fully understand the high level of service we provide, they see an interruption to supply as something really bad. They don't see that it happens so infrequently, they need to take it in context... I think they're starting to realize the level of service is really good. It's just education." Primary, WoC

6.4 Primary stakeholder perspective on CCWater's role and positioning

There are a number of attitudes that emerged strongly from the qualitative research amongst primary stakeholders which help to explain the drivers that are shaping stakeholder perceptions:

- **CCWater is not operating from a position of strength:** its industry standing is affected by the belief amongst the majority of stakeholders that its future is uncertain. Furthermore, several stakeholders both from water companies and Government, regulatory and industry bodies perceive that its relationship with Ofwat is poor.
- **Over-claiming its value:** CCWater is perceived by some stakeholders to take the credit for successes they only play a part in. An example concerns how CCWater talks about its influence in the Price Review e.g. that customers are now at the heart of the process and the amount of money saved on customers' behalf. Stakeholders do not see CCWater being solely responsible for the emergence of a more customer-centric regulatory process (it was already the 'direction of travel') as one of its key successes (because Ofwat can make the same claims).
- **CCWater is perceived to spread its role too thinly and act beyond its remit:** It can appear to be out of depth or lacking expertise in some areas and is felt to neglect the wider advocacy role. CCWater stepping into economic analysis was particularly raised as an example of CCWater stepping too deeply into the economic regulator's space. The survey asked questions about CCWater's performance relating to a) pressing the industry for services that are right first time, b) ensuring safe drinking water is safe and c) encouraging the industry to protect vulnerable customers: many stakeholders made the point that there are other drivers to achieve these aims – and while they acknowledge CCWater plays its part, other bodies are more strongly associated with these areas.

'CCWater has no capacity to deliver outcomes in that area [water quality]' Primary, Government/Regulatory

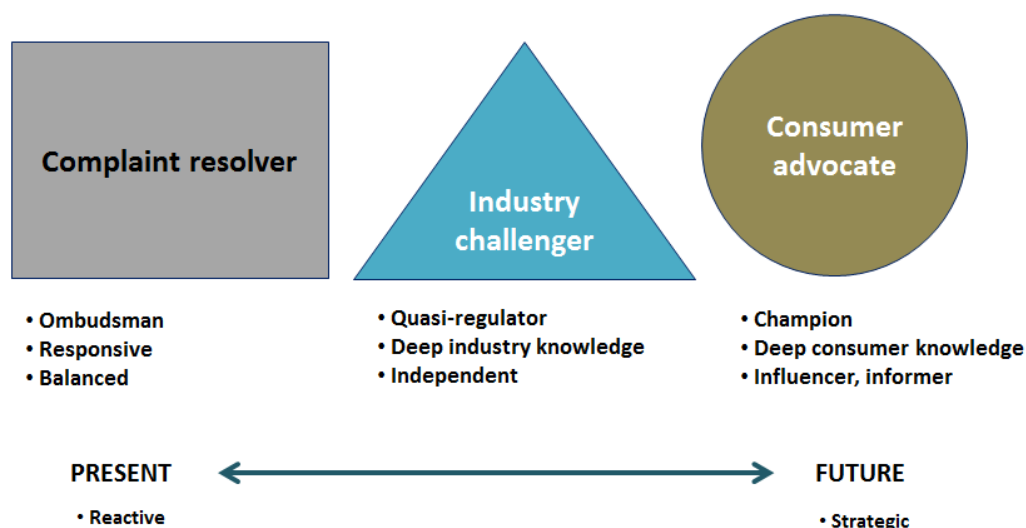
"CCWater sometimes tries to get involved when it's not in their remit like water quality and leakage." Primary, WoC

- **Tone and style of CCWater:** Many stakeholders refer to CCWater as a regulator and describe it holding the industry to account. They comment that some of CCWater's behaviours can undermine its reputation and influence (and are at odds with the advocacy role). This final point is discussed in greater detail in the following text.

*“Quite a lot of their headlines suggest that were it not for CCWater water companies would be going around charging high prices, not caring for the vulnerable and ripping customers off. Their desire to keep themselves relevant and prove their value means they go further than we would like in their claims and **the distance they keep from us.**”* Primary, WaSC

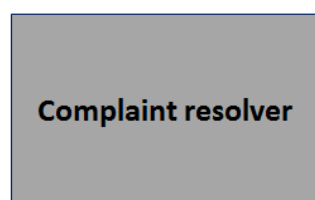
Figure 34 illustrates the three roles that are important to distinguish in order to then understand primary stakeholders’ views on CCWater’s role as the industry’s consumer body.

Figure 34 Primary stakeholder perspectives on CCWater’s roles



Each of these roles is now discussed in turn within the following section.

6.4.1. CCWater as a complaint resolver



Resolving complaints is seen as central to CCWater’s remit and it is generally perceived to perform well in this role.

Water company stakeholders feel equally motivated to resolve complaints and see the importance of an independent mediator. This is a part of CCWater’s role where companies see shared values in trying to resolve complaints. CCWater is also praised for demonstrating fair-mindedness and a balanced approach within this role as illustrated in the comments below.

“They are successful at this and it is very important.” Primary, WaSC

“They do hold us to task and they do have influence – maybe that’s because they are pushing at an open door ... We want to ensure we are providing our customers with good service.” Primary, WoC

“Customer complaints: that is the most important part and the most unique thing they do.” Primary, WaSC

“Effective in dealing with complaints - certainly... they do come to a common sense agreement and that can be difficult.” Primary, WoC

However, in the context of complaints reducing across the industry, some question whether this function alone is enough to justify CCWater’s role in future. Questions were also raised about the new alternative dispute resolution scheme and what CCWater’s role will be.

6.4.2. CCWater as an industry challenger

The industry challenger role *i.e. representing the views of customers via its participation in the industry’s regulatory processes, and publishing research and data providing industry comparisons* is a more contentious aspect of CCWater’s role.



While there is widespread praise for the hard work and commitment shown by CCWater throughout the PR14 process, many primary stakeholders perceive a blurring of roles with the economic regulator. This is particularly as CCWater is believed to concentrate its efforts on the value for money agenda - to the exclusion of other important consumer issues such as deregulation in the non-domestic market and ensuring sustainability in the future.

“CCWater dived into some things that they don’t really know about like financial reporting... Ofwat look at that and can see it is all wrong. They should not work outside areas...they have expertise in...it can undermine you.” Primary, WoC

“The consumer role has been very much seized by the economic regulator... actively operating in that space whether it’s in terms of consumer protection through Price Reviews, establishing the framework, determining roles... it could be seen as quite dismissive of CCWater’s ability to provide information to the economic regulator... Ofwat has just swatted them really.” Primary, Representative, professional and industry bodies

“They just need to be careful they don’t stray into the economic regulator’s role.” Primary, WaSC

“Their hobby horse is value for money; they beat the industry to death about value for money.” Primary, WaSC

The *industry challenger* role sees CCWater acting like a regulatory body and for many stakeholders CCWater’s image has been shaped by its behaviours across PR14. For instance, it has chaired many of the CCGs and this is seen to have taken precedence over its wider customer advocacy role; it has published research perceived to be designed to challenge both industry and regulators on specific regulatory issues; stakeholders perceive CCWater in

the media as keen to admonish – not support – the industry; and more recently initiating quarterly reporting¹⁴ which is adding a new regulatory-style burden.

“It adds to the regulatory burden and trying to report things like leakage on a quarterly basis is just not sensible... they are trying to do an Ofwat role. It feels like creating something to do to retain their existence.” Primary, WaSC

Quarterly reporting is also felt to be out of kilter within new Performance Outcomes framework. It is criticised for being an ‘old-style’ regulatory approach initiated in the new context of companies being measured against own targets, not via industry comparison league tables.

“I understand that they need to critique the industry but there are some areas where they support the work of the industry and they could do far more to help it along instead of bashing it.” Primary, WaSC

“Their desire to be a tough regulator gets in the way. What are they? A customer advocate who wants to collaborate with companies or a customer advocate who thinks that they need to beat the crap out of companies until they do what they otherwise wouldn’t...their exaggerated claims and their desire for their relevance and role and remit to be recognised gets in the way.” Primary, WaSC

Around half of primary stakeholders were critical of the research CCWater commissioned and published during PR14.

There are two issues: firstly where the role of the research is perceived to be a ‘stick’ to hold the industry to account, stakeholders look very closely at its design and robustness – and have found it wanting in terms of methodological reliability and design bias.

“Research seems to be a bit lightweight, under-budgeted, engaging a lot of second tier consultants so we question the robustness.” Primary, WaSC

“They shot themselves in the foot by doing their own research as part of the PR process. They did something on cost of capital and came out with a ridiculously low number. They are intelligent people and they should know that means the plan is not financeable... They look stupid and they lose their credibility.” Primary, WaSC

“Based on the water and poverty report – it seemed just to be chit chat. Hello everyone here are the findings and then suddenly that’s policy. I think that’s poor. They should define best practice and then leave it up to the individual companies in terms of what they actually do.”
Primary, WaSC

¹⁴ During 2013 CCWater asked water companies to change the way in which they reported performance data to its committees. The result was a reduced set of measures which were felt by CCWater to be customer focussed and comparable. Companies produce quarterly reports, although some of the data is only reported every six months, and some annually.

Secondly, stakeholders are critical of the way research is used and interpreted. A single piece of research with specific objectives, as well as appearing to be designed to support a specific agenda, can result in very literal analysis. Stakeholders, especially those in policy setting roles, find CCWater's output lacking in deep insight about the consumer perspective.

"Some research looks like it is stating the obvious." Primary, Government/Regulatory

"Designed to elicit a certain response." Primary, WaSC

In summary, while stakeholders are accepting of the role of the consumer body to challenge the industry, there is criticism about how CCWater performs this function.

6.4.3. CCWater as a consumer advocate



There is a widespread view that CCWater is not acting strategically as a customer advocate.

Government stakeholders and industry bodies address this point very directly and want to see CCWater acting more effectively as a strong consumer voice. At present, some stakeholders see CCWater having limited ability to apply its knowledge of consumers to emerging issues, having to rely on commissioned research to inform its position. Additionally, it is not seen to lead on the consumer agenda in the policy setting arena. Stakeholders across all categories (primary, secondary and tertiary) are less aware of CCWater's role influencing Government.

"If they've got research they will tell you what customers think. It worries me sometimes that they don't seem to have an opinion of their own. They should have more knowledge themselves about what the critical issues are." Primary, Government/Regulatory

"I'm not aware of them being a consumer advocate." Primary, Representative, professional and industry bodies

"I feel that sometimes CCWater are a bit blinkered on bills and as a Government we are trying to deliver something much more than that." Primary, Government/Regulatory

"[Re Water Bill] We had to keep going to them saying 'don't you have a view on this?' We got very little out of them at that point. They missed a trick to be influential.... They hadn't got their piece of handy research." Primary, Government/Regulatory

"Moving away from...complaints, compliance and costs to something that has got a broader representation of customers' views... they need to lead on this and the other organisations will need to respond." Primary, Representative, professional and industry bodies

Stakeholders from water companies are also looking to CCWater to apply its broader advocacy role and to work more collaboratively with the industry – and this is where there is a conflict with CCWater's perceived regulatory style of behaviour. Water company stakeholders see the benefits of a stronger advocacy role in the following ways:

- A consumer body that balances holding water companies to account with being more openly supportive of industry at the national level when there are positive examples from the industry.
- Working more collaboratively in relation to e.g. behaviour change campaigns and joint research projects.
- Enabling the industry to work more effectively with wider stakeholders by fostering connections between the industry and consumer representative bodies e.g. charities.
- Being more visible at a policy level and being seen to be listened to by Government and Ofwat.
- Being more visible championing the customer on a range of themes and bringing new insights to the industry.

“I would like to know what they are saying to Defra and Ofwat. Probably because CCWater are regulators they don’t lobby forcefully, particularly if their future is in question.” Primary, WaSC

“They’re not given much weight by some of the stakeholders - Ofwat are very dismissive of them for instance.” Primary, WoC

“CCWater clearly play a role in pushing the customer objective...but I am not sure how much difference it has made in terms of what Ofwat would have done anyway.” Primary, WaSC

“They have a role in working collaboratively with us and with other consumer organisations and this is more important than the regulatory relationship – we share objectives a lot of the time.” Primary, WaSC

“They could do more on the championing side which will raise their brand.” Primary, WaSC

7 Appendices

7.1 Introductory letter to primary stakeholders

Dear (Contact Name)

I am writing to ask for your help in evaluating the work of CCWater. The organisation is now in its tenth year representing water and sewerage consumers in England and Wales, and as one of CCWater's key stakeholders, I thought this seemed a good time to ask for your views on CCWater, and if we could improve the way we work together.

We have commissioned Blue Marble Research, an independent research consultancy, to undertake a stakeholder consultation on our behalf; they may contact you in the next few weeks and invite you to participate in a one-off in-depth interview lasting around 60 minutes. This would be conducted either in person, or by telephone if preferred, at a time and place of your convenience.

CCWater will not know who is being interviewed and your contribution will not be attributed to you personally or to your organisation.

If you have any questions or wish to opt out of the study you can contact Blue Marble directly by phoning 01761 239329 or emailing nicola@bluemarbleresearch.co.uk. You can also contact my colleague, Liz Cotton on 0121 345 1043 or liz.cotton@ccwater.org.uk.

I very much hope that you will spare time to participate in this study. Because of the need for confidentiality I won't know whether you were one of the participants and therefore I won't be able to thank you personally. But do be assured that we are very grateful for your time and your comments.

Yours sincerely,

Dame Yve Buckland
Chair, Consumer Council for Water

7.2 Introductory letter to secondary and tertiary stakeholders

Dear (Contact Name)

I am writing to CCWater's stakeholders to ask for their help in evaluating how successful Consumer Council for Water (CCWater) is at delivering for water consumers.

As CCWater enters its tenth year of representing water and sewerage consumers in England and Wales, this seems a good time to ask our stakeholders for their views.

We have commissioned Blue Marble Research, an independent research consultancy, to undertake a stakeholder consultation on our behalf. In the next few weeks a member of Blue Marble's team may be in touch to ask you to participate in a 20 minute telephone survey at a convenient time.

CCWater will not know who is being interviewed and your contribution will not be attributed to you personally or to your organisation.

If you have any questions or wish to opt out of the study you can contact Blue Marble directly by phoning 01761 239329 or emailing nicola@bluemarbleresearch.co.uk. You can also contact my colleague, Liz Cotton on 0121 345 1043 or liz.cotton@ccwater.org.uk.

I very much hope that you can spare the time to participate in this study. Because of the need for confidentiality I won't know whether you were one of the participants and therefore I won't be able to thank you personally. But do be assured that we are very grateful for your time and your comments.

Yours sincerely,

Dame Yve Buckland

Chair, Consumer Council for Water

7.3 Quantitative questionnaire

Stakeholder Telephone Interview Questionnaire

Final 24/11/2014

Introduction

Good morning/ afternoon, my name is xxxx and I am calling from Blue Marble Research on behalf of the Consumer Council for Water. Could I speak to xxxxx please?

We are conducting stakeholder research on behalf of the Consumer Council for Water (CCWater). You should recently have received an email from Dame Yve Buckland (CCWater's Chair) informing you about the study. The questionnaire will take about 20 minutes to complete and the evaluation will inform CCWater's strategic plan and help to ensure they work effectively with stakeholders in the future.

Please note that this is *independent* research and all of your answers will be completely anonymous. Individual responses will *not* be fed back to anyone within CCWater and all results will be combined together for analysis purposes.

Is this something you would be willing to participate in?

INTERVIEWER NOTES FOR THE BRIEFING MEETING:

- If stakeholder does not remember the introductory letter or are sure that they have not received it offer to send again if necessary (see briefing pack).
- Additional information about the topic can also be supplied if requested (see briefing pack).
- Once the study has been completed we will e-mail all respondents a summary of the results which will also be available in full on the CCWater website.
- Respondent details have been supplied to us from CCWater. Individuals have been selected from this list to ensure a spread of different types of stakeholders. Confidentiality is assured and CCWater will not be provided with the names of individual participants.

Please note questions in red are tracking questions and have not been amended from 2007 unless specified

Section 1: Stakeholder profile and relationship with CCWater

- Q1. Stakeholder level (i.e. primary, secondary, tertiary) to be pulled through from the contact database.
- Q2. Stakeholder theme (i.e. water, media, consumer) to be pulled through from the contact database.
- Q3. Would you say that your role has a water industry focus, or does your role have a broader remit of which water industry matters are one aspect?

Water industry focus.....1
Broader remit.....2
(Don't know).....3

- Q4. This survey is mostly short, structured questions but before we start with these, could you tell me how you feel about CCWater in your own words?

PROBE FULLY AND PROMPT AS NEEDED e.g. *Would you say you feel positively, negatively or neutral about CCWater and why? Please could you explain a little more about why you say that?*

- Q5. How well would you say you understand what CCWater do? **READ OUT – SINGLE CODE**

Very well 1
Fairly well 2
Neither 3
Not very well 4
Not at all well 5
(Don't know) 6

- Q6. We want to understand the nature of your relationship with CCWater and how close or distant you are as a stakeholder. Which of the following is the best analogy? **READ OUT – SINGLE CODE**

Partner – very close with shared values 1
Friend – close with shared experiences 2
Colleague – shared goals 3
Acquaintance – not close 4
Stranger – not at all close 5
(Don't know) 6

- Q7. Do you think CCWater has enough of a profile with consumers to do their job adequately?

Yes 1
No 2 **GO TO Q7a**
(Don't know) 3

IF NO

- Q7a. Why do you say that?

- Q8. CCWater aims to ensure that consumers who need their help or advice are sign-posted to them, particularly when they have exhausted their water company's complaint procedure, rather than trying to raise awareness generally. CCWater's contact information is available in water companies' complaints leaflets and on their websites, appears on the back of almost all companies' water bills and in the Yellow Pages. To what extent do you agree or disagree with this approach of signposting? **READ OUT – SINGLE CODE**

Strongly agree 1
Agree 2
Neither agree nor disagree 3
Disagree 4
Strongly disagree 5
(Don't know) 6

Q9. If CCWater were to raise its profile with consumers, how do you think they should go about this? **CODE INTO THE BELOW MULTICODE**

- They do not need to raise their profile with consumers ... 1
- Via free advertising 2
- Be more media savvy 3
- More media activity (generic) 4
- More traditional media activities 5
- More digital media activities 6
- Use the water companies to promote themselves 7
- Education programmes through schools etc 8
- PR14 needs to be more in the public eye 9
- Use PR14 to promote themselves 10
- Local media / local issues 11
- National media /national issues 12
- Other (specify) 13
- (Don't know) 14

Section 2: Importance of role of consumer representative organisation

Q10. How effective do you think CCWater is as a consumer advocate? **READ OUT SINGLE CODE**

- Very effective 1
- Fairly effective 2
- Neither 3
- Not very effective 4 GO TO Q10a
- Not at all effective 5 GO TO Q10a
- (Don't know) 6

IF NOT VERY/NOT AT ALL EFFECTIVE

Q10a. Why do you say that CCW are not very/not at all effective?

Q11. We want to understand what you as a stakeholder think the role of CCWater should be. On a scale of 1 to 5, where 1 is not at all important and 5 is very important, how important do you think each of the following are for CCWater in its role as a consumer representative? **READ STATEMENTS**

ROTATE ORDER OF PRESENTATION	1. Not at all important	2. Not important	3. Neither /nor	4. Important	5. Very important	(Don't know)
Providing trusted information, evidence and research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaking up for and informing consumers [PRIORITY 5]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helping consumers with their enquiries and to resolve issues and complaints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing the water industry to protect and help vulnerable customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Putting customers at the heart of the Price Review process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing for fair and affordable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

charges that are value for money [PRIORITY 2]						
Pressing to industry to ensure customers receive safe, reliable and good quality drinking water and sustainable sewerage services [PRIORITY 3 and 4]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing for services that are right first time [PRIORITY 1]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Working collaboratively with stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Working with the industry at national level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Working with the industry at company level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Engaging with the Government on strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

3. Perceptions of CCWater's performance

ASK AFTER EACH STATEMENT AT Q11.

Q12. And where 1 is very unsuccessful and 5 is very successful, how well do you think CCWater is performing here? REPEAT IF NECESSARY

	1. Very unsuccessful	2. Unsuccessful	3. Neither /nor	4. Successful	5. Very successful	(Don't know)
ASK FOR ALL STATEMENTS IN Q11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q13. In your opinion, has the performance of CCWater improved, declined or stayed the same over the last two years? And would you say that is a little or a lot? SINGLE CODE

Improved a lot 1 GO TO Q13a
 Improved a little 2 GO TO Q13a
 Stayed the same 3
 Declined a little 4 GO TO Q13b
 Declined a lot 5 GO TO Q13b
 (Don't know) 6

IF IMPROVED A LITTLE/A LOT AT Qx

Q13a. Why do you say that you think CCWater's performance has declined over the last two years? PROBE FULLY

IF DECLINED A LITTLE/A LOT AT Qx

Q13b. Why do you say that you think CCWater's performance has improved over the last two years? PROBE FULLY

4. Attributes describing CCWater

Q14. Thinking about CCWater generally how would you rate them on the following attributes where 1 is not at all and 5 is very well. READ STATEMENTS

ROTATE ORDER OF PRESENTATION	1. Not at all well	2.	3.	4.	5. Very well	(Don't know)
Efficient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Their policies are based on research and evidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Independent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well established	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Good at information sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providing clear and relevant information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authoritative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respected by the industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
They are a trustworthy source of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q15. On a scale of 1 to 5, where 1 is not at all well and 5 is very well, how would you rate CCWater's performance in working in accordance with each of the following of their values? READ STATEMENTS

ROTATE ORDER OF PRESENTATION	1. Not at all well	2.	3.	4.	5. Very well	(Don't know)
Knowledgeable – its work is based on evidence to help achieve results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional – consistently delivering aims by being thorough and efficient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respectful – treating people fairly and with courtesy, taking into account individual needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open – transparent and honest in dealings with all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 5a. Communications from CCWater

Q16. In the last 2 years in which of the following ways have you been involved with CCWater? READ LIST SELECT ALL THAT APPLY

- Policy development..... 1
- Complaint handling..... 2
- Consultation..... 3
- Consumer representation 4
- Other (please specify)..... 5
- (Don't know) 6

Q17. Overall how well informed do you feel about the work of CCWater? READ OUT SINGLE CODE

- Very informed..... 1
- Fairly informed 2

Neither 3
 Fairly uninformed 4
 Very uninformed 5
 (Don't know) 6

Q18. Would you say you receive too much, about the right amount or too little information from CCWater? READ OUT SINGLE CODE

Too much 1
 About the right amount 2
 Too little 3
 (Don't know) 4

Q19. Do you receive the quarterly 'On Tap' email newsletter?

Yes 1 GO TO Q19a
 No 2
 (Don't know) 3

IF YES AT Q19 (RECEIVE ON TAP)

Q19a. How would you rate On Tap? Would you say it is...? READ LIST

Very good 1
 Good 2
 Neither good nor poor 3
 Poor 4 GO TO Q19b
 Very poor 5 GO TO Q19b
 (Don't know) 6

IF POOR AT Q19a

Q19b. Why have you rated On Tap as poor? PROBE FULLY

Q20. How likely are you to take notice of the following types of communication from CCWater?

ROTATE ORDER OF PRESENTATION	1. Not at all likely	2. Not likely	3. Neither / nor	4. Likely	5. Very likely	(Don't know)
The website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> GO TO Q21a/b	<input type="checkbox"/> GO TO Q21a/b	<input type="checkbox"/>
Emails addressed to multiple stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Editorials in the press	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The 'On Tap' newsletter (ONLY ASK IF RECEIVED AT Qx)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Publications such as research reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Publications such as the Annual Report and Business plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social media updates such as Twitter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ASK THOSE LIKELY/VERY LIKELY TO NOTICE THE WEBSITE AT Q20

Q21a. As a stakeholder, how would you rate CCWater's web site overall? READ OUT SINGLE CODE

- Very good 1
 Good 2
 Neither good nor poor 3
 Poor 4
 Very poor 5
 (Don't know) 6

ASK THOSE LIKELY/VERY LIKELY TO NOTICE THE WEBSITE AT Q20

Q21b. And using the same scale, how would you rate each of the following aspects of the website? READ STATEMENTS AND SCALE IF REQUIRED

ROTATE ORDER OF PRESENTATION	1. Very poor	2. Poor	3. Neither good nor poor	4. Good	5. Very good	(Don't know)
Ease of use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relevance of content and information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The look and feel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q22a. What CCWater projects or activities are you or your organisation aware of? SPONT

Q22b. Have you heard of any of the following projects and campaigns? READ THOSE NOT SPECIFIED AT Qa.

ROTATE ORDER OF PRESENTATION	Q22a. Spontaneous CODE INTO LIST	Q22b. Prompted READ LIST
Using water wisely	<input type="checkbox"/>	<input type="checkbox"/>
Water on tap	<input type="checkbox"/>	<input type="checkbox"/>
Value for money / Affordability	<input type="checkbox"/>	<input type="checkbox"/>
A sewerage system that works	<input type="checkbox"/>	<input type="checkbox"/>
Consumer rights and Responsibilities	<input type="checkbox"/>	<input type="checkbox"/>
Right first time	<input type="checkbox"/>	<input type="checkbox"/>
Speaking up for and informing consumers	<input type="checkbox"/>	<input type="checkbox"/>
Price review process	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify	<input type="checkbox"/>	<input type="checkbox"/>
None/Don't know	<input type="checkbox"/>	<input type="checkbox"/>

Q23a. Are you aware of any CCWater recently published CCWater reports? SPONT

Q23b. Have you heard of any of the following reports? READ THOSE NOT SPECIFIED AT Qa.

ROTATE ORDER OF PRESENTATION	Q23a. Spontaneous CODE INTO LIST	Q23b. Prompted READ LIST
Consumer Annual Tracking Survey (Water Matters)	<input type="checkbox"/>	<input type="checkbox"/>
Living with Water Poverty	<input type="checkbox"/>	<input type="checkbox"/>
Annual Written Complaints report	<input type="checkbox"/>	<input type="checkbox"/>
PR14 Draft Determination Research	<input type="checkbox"/>	<input type="checkbox"/>
Other – please specify	<input type="checkbox"/>	<input type="checkbox"/>

None/Don't know	<input type="checkbox"/>	<input type="checkbox"/>

Q24. The Forward Work Programme was recently sent out for consultation. Were you aware of this?

- Yes 1 GO TO Q24a
 No 2
 (Don't know) 3

IF YES AT Q24

Q24a. Have you looked at this document? IF NO – Do you intend to look at it?

- Yes 1 GO TO Q24b
 No and I don't intend to look at it 2
 No but I do intend to look at it 3 GO TO Q24b
 (Don't know) 4

IF YES LOOKED OR INTEND TO LOOK AT Q24a

Q24b. Do you intend to respond to the consultation?

- Yes 1
 No 2 GO TO Q24c
 (Don't know) 3

IF NO NOT PLANNING TO RESPOND AT Q24b

Q24c. Why don't you plan to respond to the Forward Work Programme consultation? MULTI CODE INO BELOW

- Happy with it/no need 1
 Don't have time/too busy 2
 Not relevant to me/other priorities 3
 Not interested 4
 Someone else in my organisation will respond 5
 It won't make any difference/no impact 6
 Other (please specify) 7
 (Don't know) 8

Q25. Where 1 is strongly disagree and 5 is strongly agree, to what extent do you agree or disagree with the following statements about CCWater's communications with stakeholders?

ROTATE ORDER OF PRESENTATION	1. Strongly disagree	2. Disagree	3. Neither / nor	4. Agree	5. Strongly agree	(Don't know)
CCWater has a good understanding of my organisation and our aims	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The research reports available are relevant to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CCWater communication is targeted at the right person within my organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The communications channels used by CCWater are effective	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 5b: Communicating with CCWater

Q26. On average, how often do you personally deal with CCWater? CODE INTO THE BELOW

- Once a week or more 1
- Once or twice a month 2
- Once every 2 or 3 months 3
- Once every 4 to 6 4
- Once a year 5
- Less often 6
- Never 7
- (Don't know) 8

ASK ALL

Q27. In the last 6 months, roughly how many people have you dealt with at CCWater? CODE INTO BELOW

- None 1
- One 2
- Between two and five 3
- More than five 4
- (Don't know) 5

Q28. Do you deal with regional or national level CCWater staff? CODE INTO THE BELOW

- Regional (part of England or part of Wales) 1
- National i.e. cover England and Wales 2
- Wales only 3
- (Don't know) 4

ASK FOR EACH AS APPROPRIATE

Q29. How would you rate the contact you have had with [INSERT AS APPROPRIATE]? NB

ROTATE ORDER OF PRESENTATION	1. Very poor	2. Poor	3. Neither good nor poor	4. Good	5. Very good	(Don't know)
...Regional staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...National staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...Wales staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q30. How would you (or your organisation) prefer to engage with CCWater?

READ LIST - MULTI CODE

- Face-to-face 1
- Telephone 2
- Letter 3
- E-mail 4
- Website 5
- Other (please specify) 6
- (Don't know) 7

Section 6. Overall satisfaction with CCWater

Q31. Having discussed CCWater, their strategic aims and how they communicate with you, how satisfied or dissatisfied are you with your relationship with CCWater overall? Please use a scale from zero to 10, where zero is extremely dissatisfied and 10 is extremely satisfied.

Extremely dissatisfied (0)	(1)	(2)	(3)	(4)	(5) Neither /nor	(6)	(7)	(8)	(9)	Extremely satisfied (10)	(Don't know)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q32. Overall, which of the following best describes how much you value CCWater's role?

READ LIST SINGLE CODE

- Essential..... 1
 Important 2
 Not important..... 3
 Not essential..... 4
 (Don't know) 5

Final thoughts

Q33. We are now almost at the end of the survey, do you have any final comments to make regarding your relationship with CCWater, their activities or strategic aims?

PROBE FULLY

Recontact

Q34. Once this project is complete a full report detailing the findings will be available on CCWater's website. Blue Marble and CCWater will be producing a summary of results for stakeholders who participated in the study. Is this something you would like to receive?

- Yes..... 1
 No..... 2

IF CCWATER NOT AT ALL EFFECTIVE IN ROLE AS CONSUMER ADVOCATE AND/OR PERFORMANCE DECLINED A LOT AND/OR EXTREMELY DISSATISFIED OVERALL (RATING OF 0, 1 or 2) At Q10/13/34

Q35. You've raised a number of concerns about CCWater today – would you like to discuss with CCWater how they could improve in these areas?

- Yes..... 1
 No..... 2

If Yes: We'll pass your contact details on to CCWater and ask them to contact you directly. But we won't share the specific concerns you've raised today - they will remain anonymous unless you decide to discuss them directly with CCWater

Interview note respondent's comments/any requirements for further contact

Q36. IF YES AT Q34 or Q35. I have your e-mail address as xxxxxxxxxx (CATI TO INSERT E-MAIL IF AVAILABLE), is that correct?

Yes.....	1	Thank and close
No.....	2	Go to Qx

Q. What is your correct e-mail address?
PLEASE ENTER AS RESPONDENT SAYS AND THEN READ IT BACK TO ENSURE IT IS
CORRECT

THANK AND CLOSE

7.4 Qualitative discussion guide and show cards

STAKEHOLDER IN-DEPTH INTERVIEW DISCUSSION GUIDE

Final 26/11/2014

INTRODUCTION

[2-3 mins]

Moderator introduce self and Blue Marble.

Thank you for agreeing to take part in this interview today which is being undertaken on behalf of the Consumer Council for Water (CCWater).

The interview will last up to an hour and will help inform CCWater's strategic plan and ensure they work effectively with stakeholders in the future.

Please note that this is *independent* research and all of your answers are confidential and anonymous. Individual responses will *not* be fed back to anyone within CCWater and all results will be combined together for analysis purposes.

As part of this interview we are going to ask you to answer some short questions which will be added to responses from a telephone survey which is taking place alongside these interviews. This will allow us to provide CCWater with a more robust sample for a set of metrics. In the interview today we will also be able to discuss your answers in more depth.

Are you happy for me to record the interview today? Please be aware that this is only for analysis purposes, this will not be shared with CCWater and you won't be directly identified.

Please note questions in red are tracking questions and have not been amended from 2007 unless specified

Questions in green are also asked in the quantitative survey but were not asked in 2007

Section 1: Stakeholder profile and relationship with CCWater

[10 mins]

- Could you start by telling me a bit about your current role and your relationship with CCWater as part of that role? PROBE – length of time in position/at organisation?
- The first of our short questions relates to how well you feel you understand the role of CCWater. **Would you say you understand what CCWater do very well, fairly well, neither well nor not well, not very well or not at all well? [Q1]**
- Why do you say that?
 - IF NOT VERY/NOT AT ALL WELL/NEITHER – Do you feel that this is enough for your role and interaction with CCWater, or do you need to know more about what CCWater does? Why?
 - IF NEED TO KNOW MORE – What could CCWater do to help you increase your understanding of what they do? What do you need to know?

- We want to understand the nature of your relationship with CCWater and how close or distant you are as a stakeholder. Which of the following types of relationship is the best analogy to describe your relationship with CCWater? [Q2]
 - Why do you say that?
 - Are you happy with this type of relationship?
 - IF NO - Why?
 - What level would you prefer it to be?
 - Do you deal with more than one person at CCWater? IF YES – Would you say your relationship with all of your contacts at CCWater is at this level? Why?
- Do you think CCWater has enough of a profile with consumers to do their job adequately?
- Why?
- CCWater aims to ensure that consumers who need their help or advice are sign-posted to them, particularly when they have exhausted their water company's complaint procedure, rather than trying to raise awareness generally. CCWater's contact information is available in water companies' complaints leaflets and on their websites, appears on the back of almost all companies' water bills and in the Yellow Pages. To what extent do you agree or disagree with this approach of targeted rather than general awareness raising? [Q3]
- IF STRONGLY DISAGREE/DISAGREE – Why do you say that?

Section 2: Importance of role of consumer representative

[10 mins]

- How effective do you think CCWater is as a consumer advocate? Would you say CCWater is Very effective; Fairly effective; Neither; Not very effective or Not at all effective? [Q4]
 - IF EFFECTIVE: In what ways has CCWater demonstrated that it is effective? Can you give any examples?
 - IF NOT EFFECTIVE: Why do you think that CCWater is not very/not at all effective? Can you give any examples?
- I am now going to ask you to complete a quick exercise to determine what you feel are the priorities for CCWater and how it is performing against these priorities. STAKEHOLDERS TO COMPLETE EXERCISE
- On a scale of 1 to 5, where 1 is not at all important and 5 is very important, how important do you think each of the following is for CCWater in its role as a consumer representative? [Q5]

List for reference

- *Providing trusted information, evidence and research*

- *Speaking up for and informing consumers [PRIORITY 5]*
 - *Helping consumers with their enquiries and to resolve issues and complaints*
 - *Pressing the water industry to protect and help vulnerable customers*
 - *Putting customers at the heart of the Price Review process*
 - *Pressing for fair and affordable charges that are value for money [PRIORITY 2]*
 - *Pressing the industry to ensure customers receive safe, reliable and good quality drinking water and sustainable sewerage services [PRIORITY 3 and 4]*
 - *Pressing for services that are right first time [PRIORITY 1]*
 - *Working collaboratively with stakeholders*
 - *Working with the industry at national level*
 - *Working with the industry at company level*
 - *Engaging with the Government on strategic issues*
- Why have you rated xx as the most important?
 - And why have you rated xx as the least important?
 - Are there any other areas that you think should be a priority for CCWater?

3. Perceptions of CCWater's performance

[10 mins]

- I am now going to read this list of statements again and I would like you to tell me how you think CCWater is performing against each of these where 1 is very unsuccessful and 5 is very successful? [Q6]
- Why do you think CCWater is very successful at xxxxx?
- And why do you think CCWater is very unsuccessful at xxxxx?
- IF ITEMS RATED AS IMPORTANT BUT UNSUCCESSFUL PROBE: I can see you have rated xxxx as important but unsuccessful, why is that?
- Do you think that the performance of CCWater has improved, declined or stayed the same over the last two years? [Q7] Why do you say that?
- Specifically, in what ways do you think that CCWater needs to improve its performance or concentrate on making improvements?

4. Attributes describing CCWater

[5 mins]

- Thinking about CCWater generally how would you rate them on the following attributes where 1 is not at all and 5 is very well? [Q8]
List for reference
 - *Efficient*

- *Their policies are based on research and evidence*
- *Independent*
- *Well established*
- *Good at information sharing*
- *Providing clear and relevant information*
- *Authoritative*
- *Respected by the industry*
- *They are a trustworthy source of information*

- Probe any negative in particular – what is it that makes you think that CCWater is/is not xxxxxx? Can you provide an example/give any evidence of this?

CCWater has recently introduced 4 key values which are shown in Q9.

- Looking at xxxxxx how well do you think CCWater is performing against this value, on a scale of 1 to 5 where 1 is not at all well and 5 is very well? [Q9]
- Why do you say that?
 - IF AVERAGE/POOR PERFORMANCE - How could CCWater work towards improving this?

Values for reference:

- *Knowledgeable – its work is based on evidence to help achieve results*
- *Professional – consistently delivering aims by being thorough and efficient*
- *Respectful – treating people fairly and with courtesy, taking into account individual needs*
- *Open – transparent and honest in dealings with all*

Section 5a. Communications from CCWater

[5 mins]

- In the last 2 years in which of the following ways have you been involved with CCWater?
READ
 - Policy development
 - Complaint handling
 - Consultation
 - Consumer representation
- Are there any other ways you have been involved with CCWater?
- Could you tell me a bit more about how you have been involved with xxxx? Was this successful? Why?
- Are there any other ways in which you have been involved?
- Overall how well informed do you feel about the work of CCWater? [10a]
- Would you say you receive too much, about the right amount or too little information from CCWater? [Q10b]
 - IF TOO LITTLE – What else would you like to receive from CCWater?
- Do you receive the quarterly 'On Tap' email newsletter?
- Do you read it? What do you think of it?

- Would you say it is Very good, Good, Neither good nor poor, Poor or Very Poor? [Q10c]
Why?
- What could CCWater do to improve On Tap? What else would you like to see included?
- In what other ways does CCWater communicate with you or do you receive information about them? What do you think of these? Are they effective? (e.g. *Emails addressed to multiple stakeholders, Editorials in the press, Publications such as research reports, the Annual Report and Business plan, Social media updates such as Twitter.*)
- As a stakeholder, what do you think of CCWater's web site? (PROBE for: Ease of use? Relevant content and information? Look and feel?)
- In what ways could CCWater improve the website?
- What CCWater projects or activities are you aware of? SPONTANEOUS
 - FOR EACH MENTIONED, what do you think of this project/activity?
- Have you heard of any of the following projects or activities? READ THOSE NOT ALREADY DISCUSSED FOR AWARENESS TRACKING
 - Using water wisely
 - Water on tap
 - Value for money / affordability
 - A sewerage system that works
 - Consumer rights and responsibilities
 - Right first time
 - Speaking up for and informing consumers
 - Price review process
- Are you aware of any recently published CCWater reports? SPONTANEOUS IF NOT COVERED ALREADY
- Have you heard of any of the following reports? READ THOSE NOT ALREADY DISCUSSED
 - Consumer Annual Tracking Survey (Water Matters)
 - Living with Water Poverty
 - Annual Written Complaints report
 - PR14 Draft Determination Research
- The Forward Work Programme was recently sent out for consultation. Were you aware of this?
- IF YES: Have you looked at this document?
- IF YES: What do you think of the Forward Work Programme and the activities planned by CCWater in the future?
- IF RECEIVED BUT NOT LOOKED: Do you intend to look at it?

- IF RECEIVED: Do you intend to respond to the consultation?
- IF NOT PLANNING TO RESPOND: Why don't you plan to respond to the Forward Work Programme consultation?
- Where 1 is strongly disagree and 5 is strongly agree, to what extent do you agree or disagree with the statements about CCWater's communication with stakeholders? [Q11]
 - CCWater has a good understanding of my organisation and our aims
 - The research reports available are relevant to me
 - CCWater communication is targeted at the right person within my organisation
 - The communications channels used by CCWater are effective
- PROBE most negative and positive responses: Why do you agree/disagree that xxxx?
- How effectively do you think CCWater works with stakeholders and why?
- Do you ever work in partnership or collaboration with CCWater? Can you give any examples of this?
- What are the advantages/ disadvantages to working in partnership with CCWater?
- If the right situation arose, would you or your organisation potentially be interested in working in partnership with CCWater in the future? How and why? What benefits would this bring about?
- How would you recommend that CCWater makes the most of its current relationships and develops new ones?

Section 5b: Communicating with CCWater

[10 mins]

Q26. On average, how often do you personally deal with CCWater?

- Once a week or more
- Once or twice a month
- Once every 2 or 3 months
- Once every 4 to 6
- Once a year
- Less often
- Never

- Do you think this the right amount?
- Are they more likely to contact you, or do you contact them? Is the balance correct?
- In the last 6 months, roughly how many people have you dealt with at CCWater?
- And do you deal with a) regional staff (part of England or part of Wales), b) national staff (i.e. covering England and Wales) or c) Wales only staff?
- How would you rate the contact you have had with a) Regional staff? b) National staff? c) Wales staff? (AS APPROPRIATE). [Q12]

- IF APPROPRIATE: Is there anything that CCWater could do to help improve your relationship with xxxxx staff?
- How would you (or your organisation) prefer to engage with CCWater? READ LIST
 - Face-to-face
 - Telephone
 - Letter
 - E-mail
 - Website
- Are there any other ways your organisation would like to engage with CCWater?
- Would you say that it is easy or difficult to contact to right person at CCWater?
And is that very or fairly easy/difficult? [Q13]
- Would you say CCWater are dealing with the right person/people at your organisation?

Section 6. Overall satisfaction with CCWater

[5 mins]

-
- Having discussed CCWater, their strategic aims and how they communicate with you, how satisfied or dissatisfied are you with your relationship with CCWater overall? Please use a scale from 1 to 10, where zero is extremely dissatisfied and 10 is extremely satisfied [Q14].
 - Why have you given a rating of x?
 - Overall, which of the following best describes how much you value CCWater's role?
Essential, Important, Not important, Not essential [Q15].
 - Why do you say that?
 - What one thing could CCWater do to improve their relationship with you?

Final thoughts

[2-3 mins]

-
- Do you have any final comments to make regarding your relationship with CCWater, its activities or strategic aims?

Recontact

- Once this project is complete a full report detailing the findings will be available on CCWater's website. Blue Marble and CCWater will be producing a summary of results for stakeholders who participated in the study. Is this something you would like to receive?
- If dissatisfied rating overall (rating of 0, 1 or 2) – ask if they would like CCWater to contact them to discuss further?

THANK AND CLOSE

7.5 Qualitative show cards

CCWater Stakeholder consultation – 2014

Relationship with CCWater

Q1. How well would you say you understand what CCWater do?

1. Not at all well	2. Not very well	3. Neither well nor not well	4. Fairly well	5. Very well
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q2. Which of the following types of relationship is the best analogy to describe your relationship with CCWater?



Q3. CCWater aims to ensure that consumers who need their help or advice are sign-posted to them, particularly when they have exhausted their water company's complaint procedure, rather than trying to raise awareness generally. CCWater's contact information is available in water companies' complaints leaflets and on their websites, appears on the back of almost all companies' water bills and in the Yellow Pages. To what extent do you agree or disagree with this?

1. Strongly disagree	2. Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Importance & performance of CCWater's role as consumer representative

Q4. How effective do you think CCWater is as a consumer advocate? Would you say it is...?

1. Not at all effective	2. Not very effective	3. Neither / nor	4. Fairly effective	5. Very effective
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q5. We want to understand what you as a stakeholder think the role of CCWater should be. On a scale of 1 to 5, where 1 is not at all important and 5 is very important, how important do you think each of the following are for CCWater in its role as a consumer representative?

	1. Not at all important	2. Not important	3. Neither / Nor	4. Important	5. Very important
Providing trusted information, evidence and research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaking up for and informing consumers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helping consumers with their enquiries and to resolve issues and complaints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing the water industry to protect and help vulnerable customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Putting customers at the heart of the Price Review process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing for fair and affordable charges that are value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing to industry to ensure customers receive safe, reliable and good quality drinking water and sustainable sewerage services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing for services that are right first time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working collaboratively with stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with the industry at national level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with the industry at company level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engaging with the Government on strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q6. And on a scale of 1 to 5, where 1 is not at all successful and 5 is very successful, how you think CCWater is performing against each of these?

	1. Very unsuccessful	2. Unsuccessful	3. Neither /nor	4. Successful	5. Very successful
Providing trusted information, evidence and research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaking up for and informing consumers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helping consumers with their enquiries and to resolve issues and complaints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing the water industry to protect and help vulnerable customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Putting customers at the heart of the Price Review process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing for fair and affordable charges that are value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing to industry to ensure customers receive safe, reliable and good quality drinking water and sustainable sewerage services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pressing for services that are right first time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working collaboratively with stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with the industry at national level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with the industry at company level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engaging with the Government on strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q7. In your opinion, has the performance of CCWater improved, declined or stayed the same over the last two years? And would you say that is a little or a lot?

1. Declined a lot	2. Declined a little	3. Stayed the same	4. Improved a little	5. Improved a lot
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q8. Thinking about CCWater generally how would you rate them on the following attributes where 1 is not at all and 5 is very well?

	1. Not at all well	2.	3.	4.	5. Very well
Efficient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Their policies are based on research and evidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Independent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well established	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Good at information sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providing clear and relevant information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authoritative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respected by the industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
They are a trustworthy source of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q9. On a scale of 1 to 5, where 1 is not at all well and 5 is very well, how would you rate CCWater's performance in working in accordance with each of the following of their values?

	1. Not at all well	2.	3.	4.	5. Very well
Knowledgeable – its work is based on evidence to help achieve results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional – consistently delivering aims by being thorough and efficient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respectful – treating people fairly and with courtesy, taking into account individual needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open – transparent and honest in dealings with all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Communications and CCWater

Q10a. Overall how well informed do you feel about the work of CCWater?

1. Very uninformed	2. Fairly uninformed	3. Neither	4. Fairly informed	5. Very informed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q10b. Would you say you receive too much, about the right amount or too little information from CCWater?

Q10c. How would you rate 'On Tap'? Would you say it is....?

1. Very poor	2. Poor	3. Neither good nor poor	4. Good	5. Very good
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q11. To what extent do you agree or disagree with the following statements about CCWater's communications with stakeholders?

	1. Strongly disagree	2.	3.	4.	5. Strongly agree
CCWater has a good understanding of my organisation and our aims	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The research reports available are relevant to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CCWater communication is targeted at the right person within my organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The communications channels used by CCWater are effective	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q12. How would you rate the contact you have had with a) regional b) national level staff c) Wales staff? [as appropriate]

1. Very poor	2. Poor	3. Neither good nor poor	4. Good	5. Very good
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q13. Would you say that it is easy or difficult to contact the right person at CCWater?

1. Very difficult	2. Fairly difficult	3. Neither easy nor difficult	4. Fairly easy	5. Very easy
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall satisfaction with CCWater

Q14. Having discussed CCWater, their strategic aims and how they communicate with you, how satisfied or dissatisfied are you with your relationship with CCWater overall?

(0) Extremely dissatisfied	(1)	(2)	(3)	(4)	(5) Neither /nor	(6)	(7)	(8)	(9)	(10) Extremely satisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q15. Overall, which of the following best describes how much you value CCWater's role?

1. Not essential	2. Not important	3. Important	4. Essential
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8 Conclusions and Recommendations

Current perceptions and comparisons with 2007

- CCWater is applauded for the commitment and effort it puts into its work, especially across PR14: three quarters of respondents give a satisfaction rating of between 7 and 10.
- Individuals are praised, both at a local and national level, and the local contacts are valued particularly by smaller water-only companies. Across the board, water companies want CCWater to retain its local presence.
- CCWater is seen as *well established* and *independent* and these associations have increased from 2007 to 2014. However, being *respected by the industry* and having *policies based on research and evidence* are relatively weaker associations.
- Despite its active participation in CCGs over the last two years, just a quarter of stakeholders feel there has been an improvement in CCWater's performance. Half think performance has stayed the same and a minority feel it has deteriorated.
- While personal relationships are good, the industry's respect for CCWater requires strengthening. There are a number of issues that appear to be undermining stakeholder respect for CCWater and its authority as a consumer body:
 - For some, there is the perception that CCWater strays into areas beyond its remit and encroaches on the regulatory role of other bodies. They question how CCWater's objectives relating to water quality or the environment relate to the regulatory work of DWI and Environment Agency. Some also query its remit around broader areas of value for money in the context of Ofwat's Price Review process.
 - The research it publishes is perceived to sometimes lack both rigour in its design and depth of insight in its interpretation.
 - It is lacking endorsement from Government: there is perceived to be uncertainty about CCWater's future existence.
 - Its relationship with Ofwat is perceived to be poor.
 - It is perceived to focus on its regulatory role i.e. holding the industry to account, while neglecting its wider advocacy role i.e. championing water customers and consumers.

Profile and Communication

- Stakeholders almost universally feel they understand what CCWater does 'very' or 'fairly well' – and this has increased significantly since 2007.
- Stakeholders feel informed about CCWater's work and receive the 'right amount' of information.
- CCWater is perceived to understand its stakeholders' organisations and is successful in targeting the right people.

- Reflecting the importance of having personal relationships with CCWater, face-to-face and/or telephone communication channels are the most important. On Tap¹⁵ is regarded positively by the third of stakeholders who receive it. While primary stakeholders would not expect to rely on an e-bulletin to hear from CCWater, it is an appropriate vehicle to communicate to secondary and tertiary stakeholders.
- While stakeholders find it difficult to recall specific reports unless prompted, it is clear that most are aware of several of CCWater's publications and/or projects and activities. This is particularly so in relation to publications/activities relating to the Price Review.
- Stakeholders appear to have contradictory views about the strength of profile that CCWater needs to be effective. The current (low profile) strategy of signposting water customers via water bills, websites and telephone directories is appropriate when CCWater is acting as a complaints resolver. However, many want to see CCWater having a higher profile in its wider advocacy role and believe it would be more effective in this role if it had a higher profile e.g. in the media.

Collaboration and partnership

- CCWater's role is seen as important, even essential; and given the monopoly status of the market, most stakeholders support the need for a *water specific* consumer body.
- CCWater has identified the key work strands in its Forward Work Programme¹⁶ after research with water customers to understand their priorities¹⁷. This research with stakeholders, however, identifies a perception gap in terms of what stakeholders think is important compared with where they see CCWater performing strongly:
 - 3 of the 4 key work strands highlighted in the Forward Work Programme are of lower importance to stakeholders (*Pressing for fair and affordable charges that are value for money; Pressing the industry to ensure customers receive safe, reliable, quality drinking water and sustainable sewerage services; Pressing for services that are right first time*).
 - The reason for this is that stakeholders – including those from water companies, Government, regulatory and industry bodies - perceive CCWater seeking to influence in some areas that they consider are beyond its remit – or overlap with the roles of other bodies.
 - Stakeholders do not suggest that it is less important for consumers to be represented in these areas but that the key work strands appear to overlap with other bodies e.g. *Value for money* and Ofwat; *Safe and reliable drinking water* and DWI.

¹⁵ On Tap is CCWater's quarterly e-bulletin which is targeted at Stakeholders. Stakeholders are required to register to receive

¹⁶ CCWater consults on and publishes its priorities each year in its Forward Work Programme.

¹⁷ <http://www.cewater.org.uk/wp-content/uploads/2014/01/Expectations-of-The-Consumer-Council-for-Water-.pdf>

- In the specific case of services being right first time, stakeholders within water companies point out that the industry is strongly motivated to deliver high service standards, which is why they do not rate this area as important as some of CCWater's other areas of work.
- Stakeholders perceive a number of different roles that CCWater is performing:
 - **Complaints resolver** *i.e. working with both customers and companies to resolve specific complaints:* seen as core to CCWater's activities and conducted well. It is unclear whether the new alternative dispute resolution service will change CCWater's role.
 - **Challenger, holding the industry to account** *i.e. representing the views of customers via its participation in the industry's regulatory processes, and publishing research and data providing industry comparisons:* CCWater is perceived to have been most active in this role. However, there is concern that it has stepped into the economic regulator's space. Furthermore, CCWater is criticised by some companies for its regulator-like behaviours such as implementing quarterly reporting, or the perception that it is quick to criticise the industry and slow to praise it.
 - **Consumer Advocate** *i.e. championing the interests of all consumers by being informed about consumer matters and in turn informing all relevant parties:* CCWater is perceived to be performing least strongly in this space and yet this is a role that both Government and companies are keen to see CCWater fulfil.
- Primary stakeholders voice concern about the balance of these roles and specifically that the challenger role is too dominant and the advocacy role needs strengthening.
 - Government and regulatory stakeholders do not see CCWater leading the consumer agenda in the policy setting arena and stakeholders have low awareness of CCWater's role influencing Government.
 - Stakeholders from water companies want CCWater to apply its broader advocacy role and to work more collaboratively with the industry: currently CCWater's perceived regulatory style of behaviour acts as a barrier to closer, collaborative working.

Recommendations

This research has identified that the perceived emphasis on the *challenger* role of holding the industry to account (albeit that this is inherently representing consumer interests), to the exclusion of championing the consumer, is undermining the respect stakeholders have for CCWater – and therefore its potential to set the consumer agenda. The post-PR14 period gives CCWater the opportunity to consider how it balances its various roles in order to optimise its influence and increase its authority before the PR19 cycle gets underway. Importantly, where its objectives are perceived to overlap with other bodies, CCWater should clarify its precise agenda – specifically in the areas of value for money, environmental issues and drinking water quality.

We recommend the following areas for consideration:

CCWater should demonstrate to stakeholders how it is adding value to the industry in its role as a consumer advocate. It is one space that is uniquely CCWater's and it is the role that (primary) stakeholders prioritise for CCWater but perceive to be the least in evidence. It may be necessary to increase focus in this area.

Similarly, CCWater should reconsider the emphasis it places on key strands of work as not all areas are aligned to stakeholder expectations. Stakeholders perceive unnecessary (and sometimes unwelcome) overlaps with Ofwat when CCWater is acting in its 'industry challenger' role. Additionally, stakeholders do not perceive CCWater having a specific role in areas covered by statutory environmental or water quality regulators. Should these areas of work remain central to CCWater's Forward Work Programme, we recommend that CCWater articulates its specific objectives for representing customers to avoid the criticism that it is encroaching on e.g. the economic regulatory space.

Improve CCWater's status and authority as the consumer voice: specifically, review research output and improve its ability to 'enlighten' stakeholders. While CCWater currently uses research to convey what consumers have to say about the industry, stakeholders are looking for a more strategic analysis of what CCWater's data means for the industry, and that the 'uninformed' customer view is contextualised. Hence, CCWater should draw on broader sources to produce think-pieces or White Papers to express well-evidenced arguments. While its role as an independent customer voice means it is appropriate for some types of research to be conducted independently of the industry, in other instances it would be appropriate to collaborate with and involve stakeholders in developing consumer insights.

Review CCWater's corporate 'tone of voice' and behaviours. In keeping with a more collaborative persona seeking to inform and influence, CCWater should look across all its activities to redress behaviours that could come across as *combative and critical*. CCWater should strive to adopt behaviours that support the wider advocacy role and convey four key characteristics:

Constructive

- Go beyond highlighting the problem by bringing solutions, where possible, or a deeper understanding of the root causes of problems e.g. the underlying reasons for types of complaints.
- Understand and allow for local differences (rather than applying a standardised approach across all water companies).
- Be more visible in championing the customer across a range of themes going beyond the value for money agenda which some stakeholders perceived to have dominated during the PR14.

Enabling

- Engage and influence policymakers and the industry with deep consumer insight.
- Drawing together corroborating research strands and using expert witnesses', 'White Papers' or Think pieces.
- Develop and use connections with other consumer bodies, drawing on future-thinking in other areas of consumer protection.

Collaborative

- Build on existing collaboration with individual water companies by seeking ideas around new research or campaign activity.
- Be publically supportive of the industry and/or individual water companies where activities align with CCWater's programme of work or as best practice case studies.
- By acting as a hub for wider consumer issues that have relevance to the water industry, CCWater would enable water companies to work with or understand the perspective of non water-specific consumer bodies and charities. For example, mental health charities are unlikely to have policy statements that specifically relate to water services and for them to engage with companies across the industry would be very onerous. This is where CCWater could act as a hub to inform the industry of the pertinent issues that all water companies should consider.

Strategic

- Develop a more future-focussed understanding of the consumer agenda by horizon-scanning macro-themes such as intergenerational fairness (e.g. is one generation paying more than another for water investment); societal trends that could impact the industry; relevant insight from other (more developed) countries/sectors.
- Become more visible at a national policy level: influence (and be seen to influence) Governments and other industry regulators.
- Strengthen leadership credentials as the consumer advocate in this sector.

CONSUMER COUNCIL FOR

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