

CONSUMER COUNCIL FOR



Consumer Council for Water

**Awareness of Consumer Council for Water & of
Organisations Which Help Customers with Utility
Complaints**

June 2017

Populus

Awareness of CCWater and of Organisations Which Help Customers with Utility Complaints

Background

The Consumer Council for Water (CCWater) has been representing customers and consumers of the water and sewerage industry in England and Wales since October 2005. CCWater operates through five committees, four in England and one in Wales.

Background to the research

An important part of CCWater’s Informing Consumers work is to raise the profile of CCWater and provide greater visibility so that customers who need our help are more of:

- how to contact us;
- when to contact us;
- our regional structure; and
- our role in the water industry

Related to this, CCWater also works with other organisations to whom customers may go with a complaint about their water and sewerage service or any other water- related issue so that they signpost those customers to us.

This survey provides updated awareness levels for CCWater amongst household customers in England and Wales, and also, for the first time, identifies who customers would go to for help with complaints about water, telecom/broadband and energy utilities.

Fieldwork	16 th - 27 th March 2017
Methodology	Telephone omnibus
Sample Size	1,655 total respondents, 1,347 bill payers
Weighting	The data is weighted to be representative of the number of households in England and Wales.

CCWater commissioned a telephone omnibus survey in England and Wales to gauge public awareness of the consumer body for water and sewage services.

Populus conducted 1,655 telephone interviews with adults aged 18+ between 16-27th March 2017. The first question in the survey identified those in scope for the research i.e. those responsible in their household for paying water bills. Those not responsible for paying water bills in their household were screened out of the survey. This was to maintain comparability of awareness questions with our previous research. It was also thought to be more appropriate to ask bill payers about the complaint

making process, given that they would be the most likely to make a complaint to their water company. Interviews were therefore conducted among 1,347 water bill payers across England and Wales and the data has been weighted to the number of existing households in these nations.

Statistical Reliability of Data at 95% Confidence Interval

The statistical reliability of the data at 95% confidence interval is outlined below:

Region	Sample Size	Margin of Error for response of 50%
England and Wales	1,347	2.7% +/-
England	1,131	2.9% +/-
Wales	216	6.7% +/-

A question by question summary of the findings follows. Readers should note that:

- Data on awareness of CCWater, referred to in Questions 5 to 10 of this Executive Summary as the last wave (2015-16), was collected via CCWater’s ‘Water Matters’ survey, and features in Chapter 8 of that report:
 - <https://www.cwater.org.uk/wp-content/uploads/2016/06/CCWater-Water-Matters-Report-to-client-FINAL20.pdf>.
- Red or green arrows shown in charts throughout the report signify a statistically significant difference versus last wave.
- Please note that there is a difference in the proportions of age groups interviewed in the ‘Water Matters’ survey from 2015-16 and the Populus survey in 2017. A lower proportion of 18-44 year olds were interviewed in the ‘Water Matters’ survey with 25% surveyed in 2015, compared to 35% in the Populus survey, a proportion which is nationally representative. Demographics of older age groups tend to have higher awareness of the consumer body CCWater and attribute higher importance to having a consumer body representing their water and sewage interests. In light of this, with higher proportions of those from younger demographics in the most recent survey by Populus, these attitudes are less likely to be reflected in the results, and therefore some scores have seen declines versus previous waves.

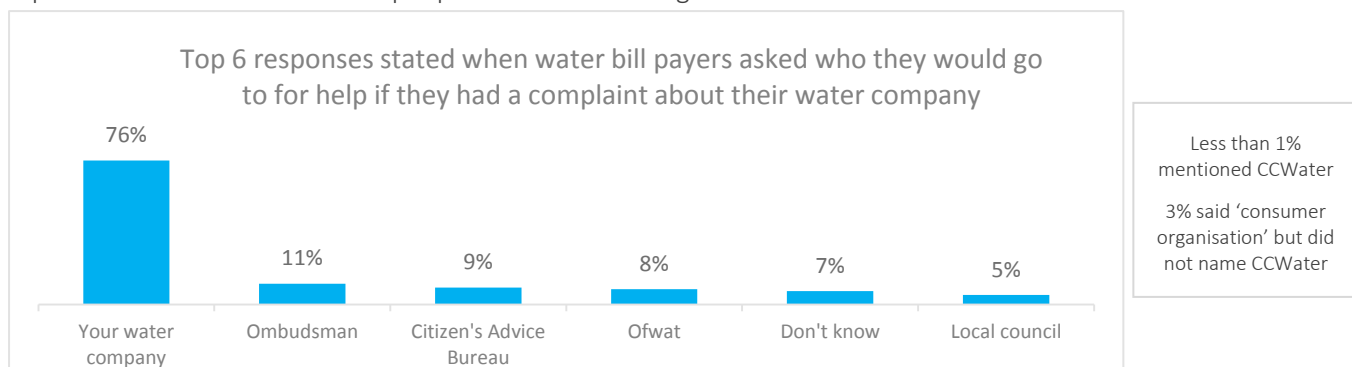
Populus is a founder member of the British Polling Council and abides by its rules. Further information can be found at www.populus.co.uk

Awareness of Organisations Which Help Customers with Utility Complaints

Q2. Imagine you are making a complaint about your water company. Who would you go to for help with this? (*Unprompted multicode question*)

Base: All water bill payers (n=1,347)

Responses do not add to 100% as people were allowed to give more than one answer.



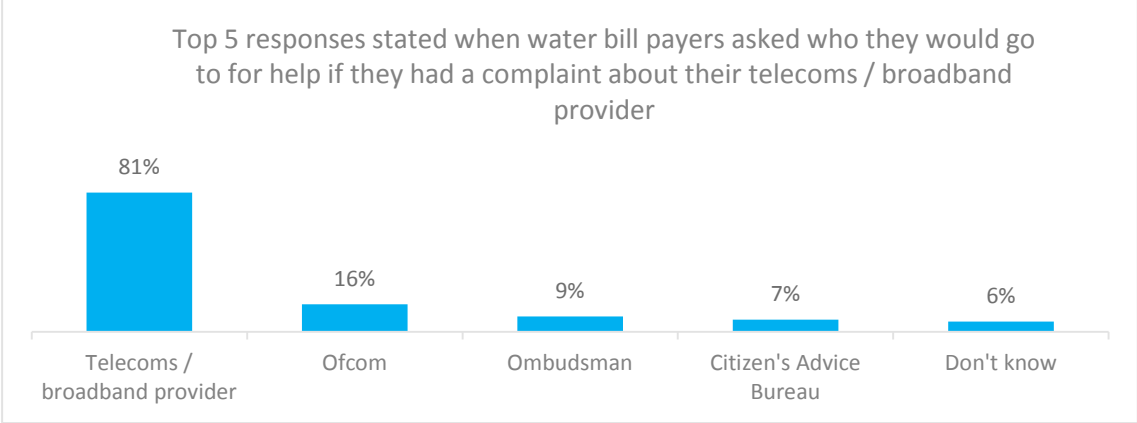
- Around three quarters (76%) of respondents name their water company as being where they would go to for help with a complaint. BAME (Black, Asian, and Minority Ethnic) respondents (85%) are significantly more likely to make a complaint directly with their water company than at a total level (76%).
- Around half (51%) of respondents stated **only** their water company as an organisation to approach if they had a complaint.
- Just 1 in 10 (11%) would go to an ombudsman for help if they had a complaint about their water company. Respondents aged 55-64 years old (18%), 35-44 year olds (15%) as well as those of the social grade AB (16%) are significantly more likely to go to an ombudsman compared to the England and Wales total (11%).
- Around 1 in 10 (9%) would contact Citizen's Advice Bureau for help with a complaint about their water company, and this tends to be more prominent among respondents living in the South West of England (17%) and Wales (14%). Just 9% of respondents living in England would contact the Citizen's Advice Bureau, significantly lower than those living in Wales.
- 7% of respondents said they did not know who they would go to for help if they had a complaint about their water company. Males (9%) are significantly more likely than females (6%) to state they don't know who to approach for help. Although not significant, 18-34 year olds (9%), those aged 65+ (9%), as well as those of the social grade C2 (10%) are more likely than at a total level to state they are not aware of the organisation to seek help from if they had a complaint about their water company.
- 1 in 20 would contact their local council (5%). Likelihood of respondents to contact their local council is significantly higher among those who rent their accommodation from the council (12%)*. Less than 1 in 20 would contact consumer organisations (3%) or check a search engine (3%). Just 2% would contact a family member, local MP or a Landlord/Landlady.
- Less than 1% stated CCWater as an organisation they would approach if they had a complaint about their water company.

*Please note that this figure may be influenced by the fact that some council tenants pay their water bill through their local authority or council.

Q3. Imagine you are making a complaint about your telecoms / broadband provider. Who would you go to for help with this? (Unprompted multicode question)

Base: All water bill payers (n=1,347)

Responses do not add to 100% as people were allowed to give more than one answer

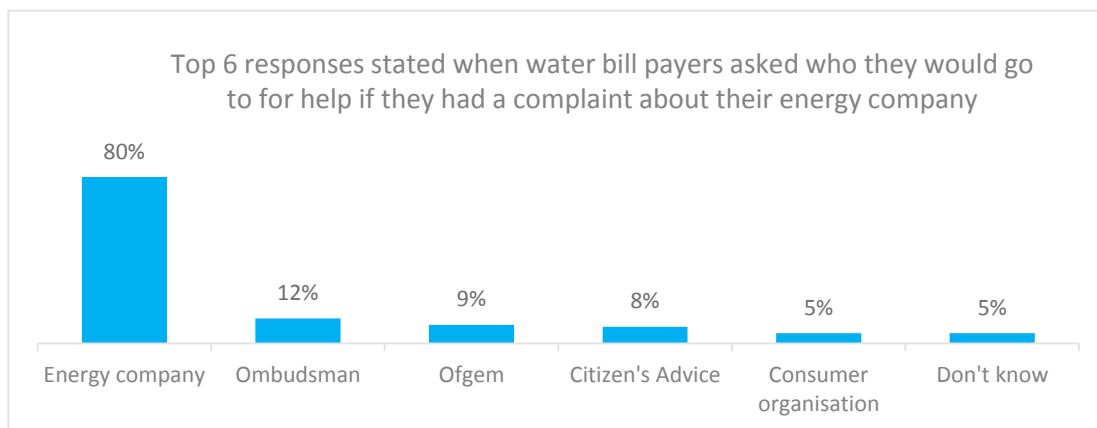


- Four fifths of respondents (81%) name their telecoms / broadband provider as where they would go to for help if they had a complaint. However, over half (57%) **only** mention their telecoms / broadband provider.
- Almost one fifth (16%) would contact Ofcom for help regarding their telecoms / broadband provider, with respondents in higher social grades more likely to do this (22% of AB social grade, and 19% of C1 compared to 14% of C2 and 7% of DE).
- Fewer than 1 in 10 respondents would go to an Ombudsman (9%) or Citizen’s Advice Bureau (7%). Respondents living in Wales are significantly more likely to contact the Citizen’s Advice Bureau (10%) than those living in England (6%).

Q4. Imagine you are making a complaint about your energy company. Who would you go to for help with this? (Unprompted and multicode question)

Base: All water bill payers (n=1,347)

Responses do not add to 100% as people were allowed to give more than one answer

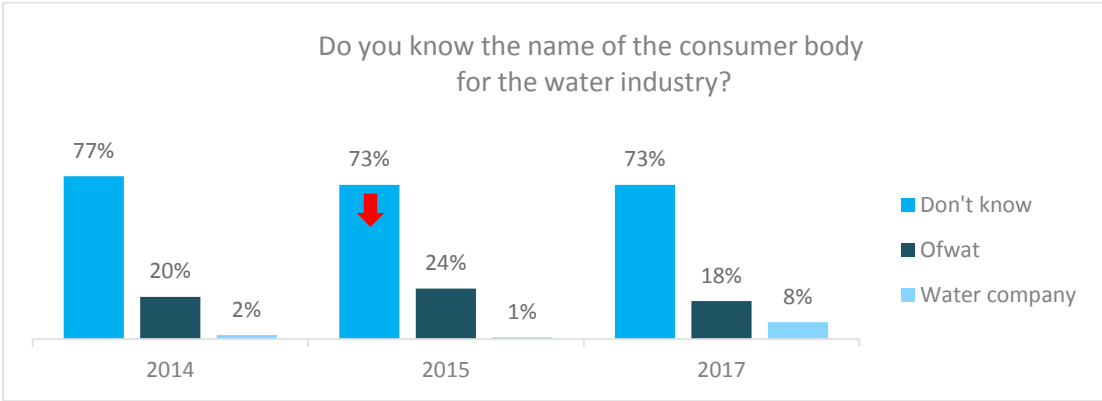


- Four fifths (80%) of respondents named their energy company as where they would go to for help if they wished to make a complaint about them. Around half (55%) **only** mention their energy company.
- Around 1 in 8 (12%) would go to the Ombudsman for help. Females (14%) are significantly more likely to take this approach than males (10%). Those living in the East Midlands and the South West of England (19%) are also significantly more likely to take this action than at a total level.
- Fewer than 1 in 10 (9%) would approach Ofgem for help with a complaint about their energy company. Those of social grade AB (14%) are significantly more likely to contact Ofgem than those of the social grades C1 (8%), C2 (8%) and DE (5%).
- Around 1 in 10 (8%) would go to Citizens Advice for help if they had a complaint about their energy company. 25-34 year olds (14%) are more likely to take this approach from other age groups as well as those living in the South West of England (17%).

Awareness of CCWater

Q5. Do you know the name of the consumer body for the water industry? (Unprompted single code question)

Base: All water bill payers (n=1,347) Base sizes: 2014 n=5,763; 2015 n=5,925; 2017 n=1,345



- Almost three quarters of respondents (73%) did not know the consumer body for the water industry, which remains stable with last wave (73%) in 2015¹. Respondents aged 25-34 years old (85%) and 18-24 years old (87%), as well as of social grade DE (80%) were most likely to say they don't know the name of the consumer body for the water industry.
- Almost 1 in 5 (18%) named Ofwat as the consumer body for the water industry, lower than seen in the last wave (24%). Males (22%) are significantly more likely to state this than females (15%). Those aged 45-54 years old (24%), 55-64 year olds (33%), and those of the social grade AB (28%) were also more likely to name Ofwat as the consumer body for the water industry.
- Less than 1% of respondents named Consumer Council for Water as the consumer body for the water industry.

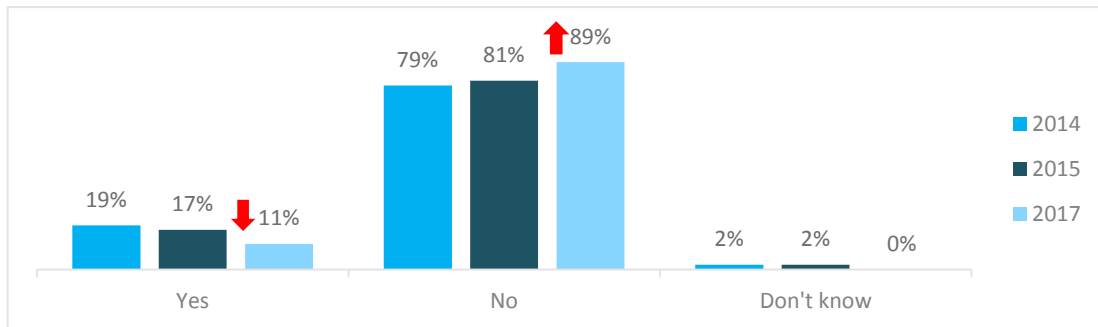
¹ Data from previous waves (2014 and 2015) was collected by DJS Research in a large scale telephone survey of household water bill payers in England and Wales. Previous waves are reported in 'Water Matters' Chapter 8:

<https://www.ccwater.org.uk/wp-content/uploads/2016/06/CCWater-Water-Matters-Report-to-client-FINAL20.pdf>

Q6. Had you heard of the Consumer Council for Water before now?

(Prompted single code question)

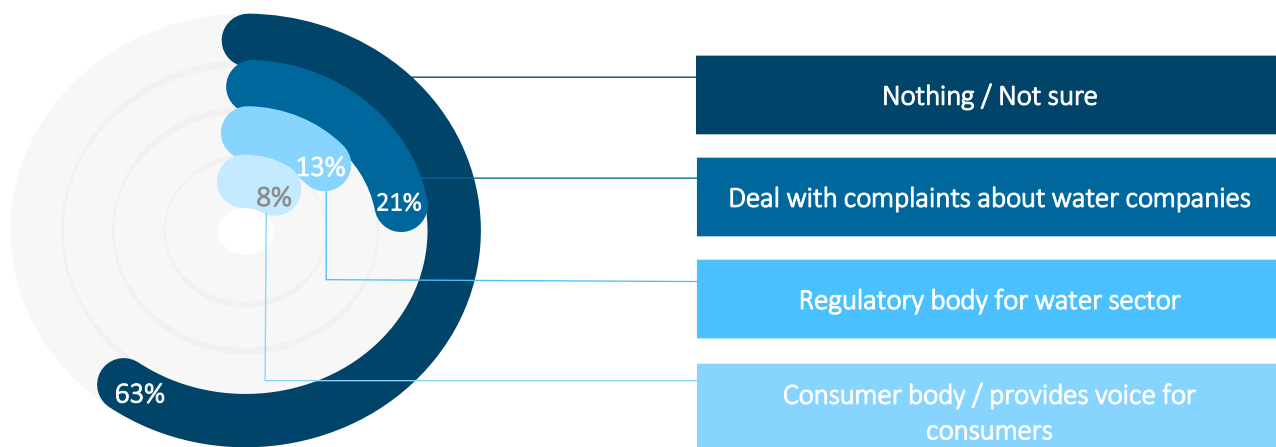
Base sizes: 2014 n=5,763; 2015 n=5,925; 2017 n=1,345



- When prompted with the name of Consumer Council for Water, almost 9 in 10 respondents (89%) have not heard of CCWater - a significantly higher lack of awareness than seen in the 2015 wave (81%).
- Awareness of CCWater is particularly low among younger bill-payers, with 96% of 25-34 year olds, 95% of 18-24 year olds and 94% of 35-44 year olds having not heard of the consumer body for the water industry. Those living in London (94%) are also significantly more likely to have not heard of CCWater than at a total level.

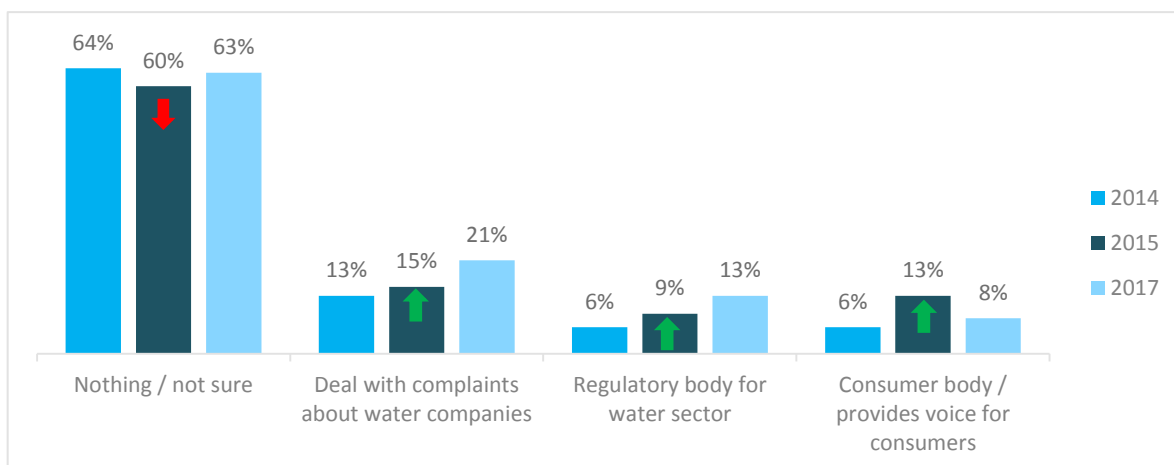
Q7. What, if anything, do you know about them?
(Unprompted multicode question)

Base: All bill payers who have heard of CCWater (n=155)



Base sizes: 2014 n=1,192; 2015 n=1,079; 2017 n=155

Responses do not add to 100% as people were allowed to give more than one answer

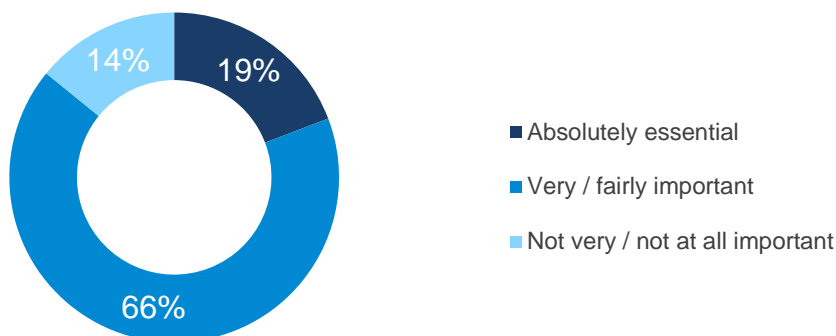


- Almost two thirds (63%) of respondents don't know anything about CCWater or were not sure of its role compared to 60% in the last wave, although this is not a significant change. Over a fifth (21%) identifies that CCWater deals with complaints about water companies.
- Around 1 in 10 thought that CCWater is a regulatory body for the water sector (13%) and 8% were able to identify that they are an organisation which provides a voice for consumers.

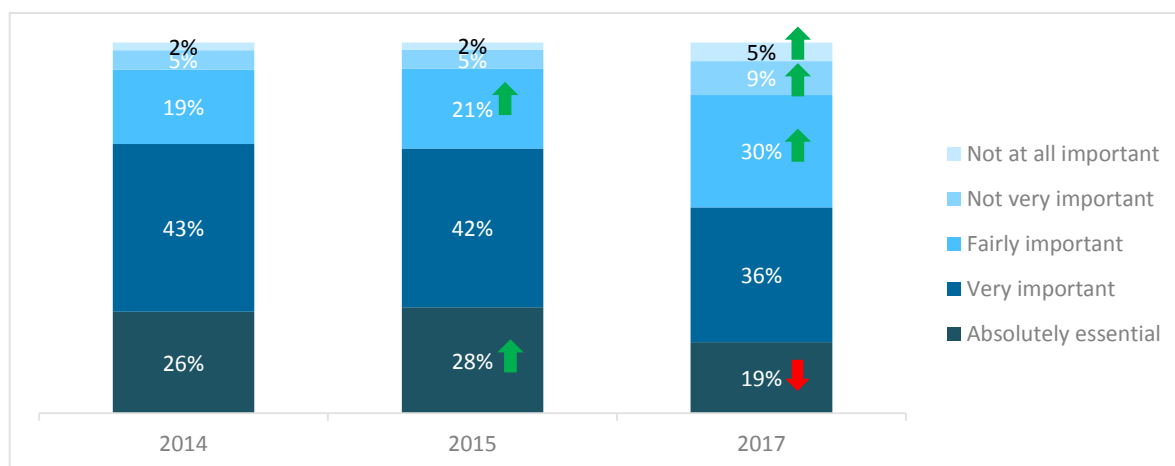
Q8. How important is it to you to have a consumer body representing your interests about the water and sewage services you receive?
(Prompted single code question)

Base: All bill payers (n=1,347)

Those who stated 'Absolutely essential / very / fairly important' NET: 85%



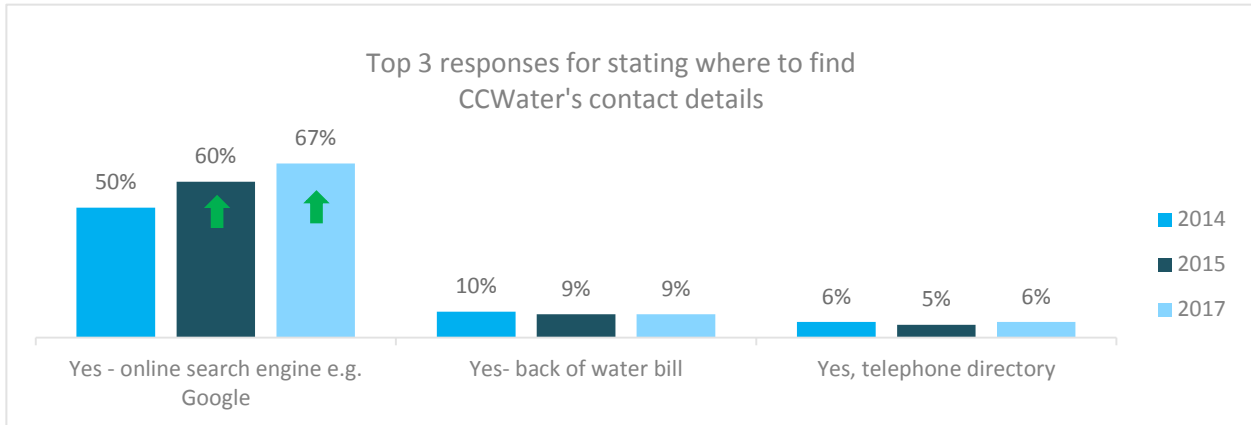
Base sizes: 2014 n=5,763; 2015 n=5,964; 2017 n=1,347
 Responses may not add to 100% due to rounding



- Around 1 in 5 respondents (19%) believe it is 'absolutely essential' to have a consumer body representing their interests about the water and sewage services they receive, significantly lower than last wave (28%). Respondents living in Wales (27%) are significantly more likely to agree it is 'absolutely essential' to have a consumer body representing their interests than those living in England (18%).
- Two thirds (66%) believe it is 'very / fairly important' (compared to 69% last wave).
- Just 14% of respondents feel it is 'not very / not at all important' to have a consumer body representing their interests relating to water and sewage services, although this is significantly higher than last wave (7%). These respondents are significantly more likely to be male (17% vs. 12% of females), be aged 35-44 years old (17%) or 65+ (18%).
- Females (59%) are significantly more likely than males (51%) to feel it is 'absolutely essential/ very important' to have a consumer body representing their needs. The age groups 45-54 year olds (25%), 55-64 year olds (28%); as well those living in Wales (27%) are also significantly more likely to agree with this view.

Q9. If you wanted to get in touch with the Consumer Council for Water, do you know where to look for their contact details?
(Prompted single code question)

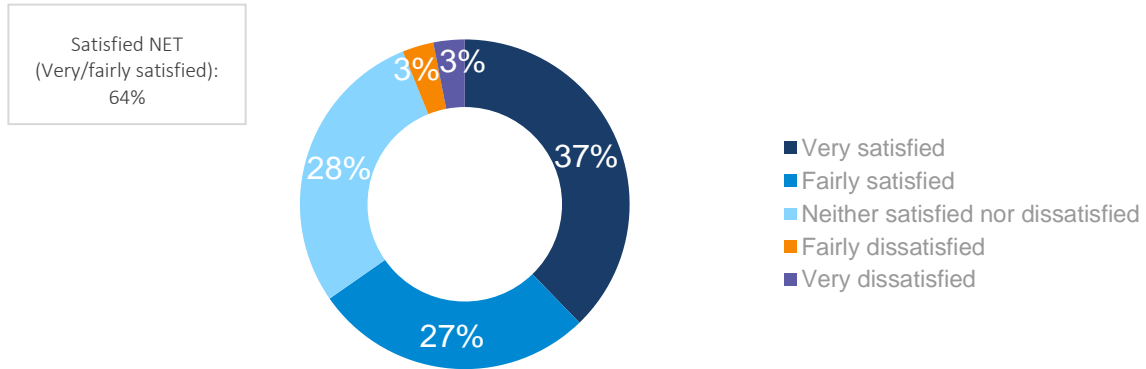
Base: All bill payers (n=1,347) Base sizes: 2014 n=5,763; 2015 n=5,964; 2017 n=1,347



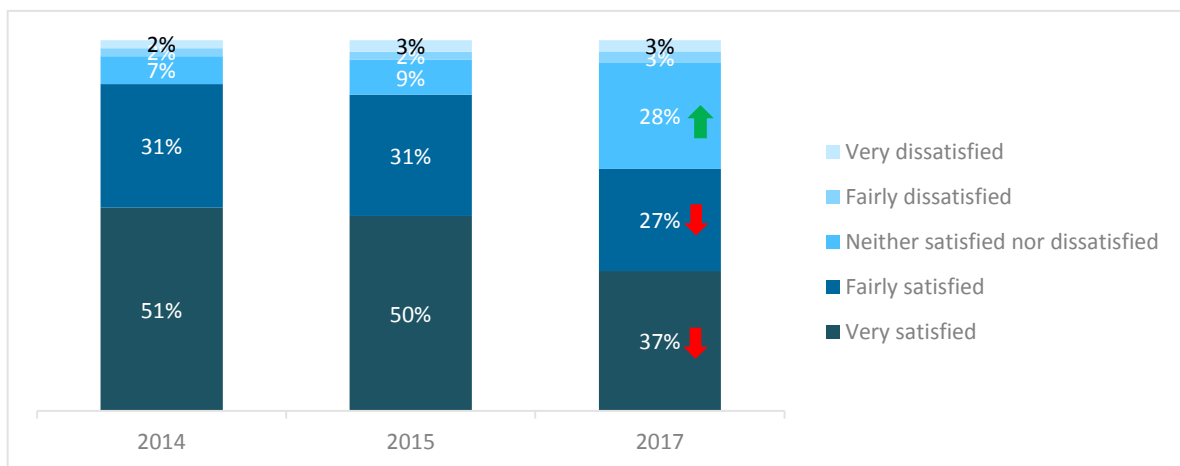
- Nearly 8 in 10 (78%) said they would know where to look for CCWater’s contact details, with over two thirds of these people (67%) stating they would go online to find them. This is significantly higher than last wave, where 60% stated they would search online.
- Around 1 in 10 (9%) said they could find CCWater’s contact details on the back of a water bill, and this remains stable versus last wave (9%).
- Those aged 65+ years old (40%) are significantly less likely than at a total level to search online for CCWater’s contact details, and are significantly more likely to use a telephone directory (13%) compared to all bill-payers (6%).

Q10. You are currently charged about 21p a year for this service as part of your water bill. How satisfied or dissatisfied are you with this in terms of value for money?
(Prompted single code question)

Base: All bill payers (n=1,347)



Base sizes: 2014 n=5,763; 2015 n=5,964; 2017 n=1,347



- Almost two fifths (37%) feel ‘very satisfied’ with the value for money in terms of the service provided by CCWater. Those aged 65+ years old (43%) are significantly more likely to feel ‘very satisfied’ than all bill-payers (37%). Those living in Wales (44%) are also significantly more likely to feel this way than those living in England (37%).

Summary

- Awareness of independent organisations which are there to help with utility complaints is generally low.
- For water complaints, 51% were only able to name their water company as being where they would go for help with a complaint; for telecoms/broadband 57% only mentioned their service provider, and for energy this figure was 55%. These respondents are potentially vulnerable as they are unaware of other independent sources of expert advice which could potentially unlock a situation for them.
- Awareness of CCWater as an organisation to approach for help is low among those living in England and Wales with less than 1% naming CCWater, although a further 3% said they would approach the consumer body if they wanted help with a complaint about their water bill.
- Awareness of the regulator for telecoms / broadband provider is highest of all utility types with 16% stating they would approach Ofcom if they had a complaint about their telecoms / broadband provider. Almost 1 in 10 state they would approach Ofgem (9%) if they had a complaint about their energy company, and Ofwat (8%) if they had a complaint about their water company.
- In terms of general awareness of CCWater, unprompted awareness of CCWater is less than 1% among those living in England and Wales. When asked if they had heard of CCWater before, almost 9 in 10 respondents (89%) had not. Of those who had heard of CCWater, around two thirds (63%) were not sure of the consumer body's role, although over one fifth (21%) were aware that they deal with complaints about water companies. Awareness of CCWater is particularly low among younger bill-payers, with 96% of 25-34 year olds, 95% of 18-24 year olds and 94% of 35-44 year olds having not heard of the consumer body for the water industry.
- Almost 9 in 10 (85%) of respondents feel it is important to have a consumer body representing their interests relating to the water and sewerage services they receive. This feeling is significantly higher among those living in Wales (89%) compared to those living in England (84%).
- Over three quarters (78%) of those living in England and Wales say they know where to find CCWater's contact details. Over two thirds (67%) said they would search for CCWater's contact details via an online search engine.
- Almost two thirds (64%) of respondents feel 'very' or 'fairly satisfied' with the value for money they receive from the 21p annual charge on their water bill for CCWater's service. Respondents living in Wales (44%) are significantly more satisfied than those living in England with the value for money they receive (37%).

Appendix

The sample sizes for each question shown in this report are outlined below:

Question	Sample Asked	Sample Size
Q1	All Respondents	1,655
Q2	All bill payers	1,347
Q3	All bill payers	1,347
Q4	All bill payers	1,347
Q5	All bill payers	1,347
Q6	All bill payers not mentioning CCWater at Q5	1,345
Q7	All bill payers who have heard of CCWater	155
Q8	All bill payers	1,347
Q9	All bill payers	1,347
Q10	All bill payers	1,347

Definitions of the social grades referred to throughout this report are outlined below:

A	Higher managerial, administrative and professional
B	Intermediate managerial, administrative and professional
C1	Supervisory, clerical and junior managerial, administrative and professional
C2	Skilled manual workers
D	Semi-skilled and unskilled manual workers
E	State pensioners, casual and lowest grade workers, unemployed with state benefits only

Demographic profile

Demographic	Proportion
Gender	
Male	49%
Female	51%
Age	
18-24 year olds	12%
25-34 year olds	17%
35-44 year olds	17%
45-54 year olds	18%
55-64 year olds	14%
65+ year olds	22%
Region	
North East	4%
North West	12%
Yorkshire & Humberside	10%
West Midlands	10%
East Midlands	8%
Wales	5%
Eastern	11%
London	14%
South East	15%
South West	10%
SEG²	
A	8%
B	19%
C1	27%
C2	22%
D	10%
E	14%

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² A= Higher managerial, administrative and professional, B= Intermediate managerial, administrative and professional, C1= Supervisory, clerical and junior managerial, administrative and professional, C2=Skilled manual workers, D= Semi-skilled and unskilled manual workers, E= State pensioners, casual and lowest grade workers, unemployed with state benefits only