



Consumer Council for Water:

Stakeholder Perceptions Research 2017



On behalf of CCWater

November 2017

CONTENTS

Foreword from Alan Lovell, Chair of CCWater	i
Executive Summary.....	iii
1. INTRODUCTION	1
1.1 Background.....	1
1.2 Objectives	2
2. METHODOLOGY.....	4
2.1 Chapter summary	4
2.2 Methodology	4
3. STAKEHOLDER RELATIONSHIPS	9
3.1 Chapter summary	9
3.2 General opinions of CCWater	9
3.3 Involvement with CCWater	12
3.4 Relationship with CCWater	14
3.5 Working relationships with national and regional staff	16
3.6 Understanding what CCWater does	19
4. HOW IS CCWATER PERCEIVED.....	21
4.1 Chapter summary	21
4.2 Overall satisfaction and importance	22
4.3 Perceptions of CCWater’s performance.....	27
4.4 Key driver analysis: comparing importance of work vs. perceived performance.....	37
4.5 Attributes about CCWater	42
5. COMMUNICATION.....	46
5.1 Chapter summary	46
5.2 Receipt of information	47
5.3 Communication channels	50
5.4 The website	52
5.5 E-bulletin – ‘On Tap’	54
5.6 Forward Work Programme (FWP).....	55
5.7 CCWater reports, projects and activities	56
6. CCWATER ROLE AND POSITIONING	65
6.1 Chapter summary	65
6.2 Profile with consumers.....	65
6.3 Role as a consumer advocate	69
7. CONCLUSIONS AND RECOMMENDATIONS	73
Appendix A: Introductory letter to primary stakeholders	
Appendix B: Introductory letter to secondary and tertiary stakeholders	
Appendix C: Quantitative questionnaire	
Appendix D: Qualitative discussion guide	
Appendix E: Recommendations concerning fieldwork process	

List of Figures

Figure 1: Positive feelings about CCWater among secondary and tertiary stakeholders in 2017	10
Figure 2: Negative feeling about CCWater among secondary and tertiary stakeholders in 2017	11
Figure 3: Average frequency of contact with CCWater in 2017	13
Figure 4: Relationship model of stakeholders with CCWater 2014 and 2017.....	15
Figure 5: Proportion who had dealings with national and regional staff in 2017	17
Figure 6: Rating of contact with regional CCWater staff in England and Wales 2014 and 2017	18
Figure 7: Rating of contact with national CCWater staff in England and Wales 2014 and 2017	18
Figure 8: Level of understanding of what CCWater does 2007, 2014 and 2017	20
Figure 9: Overall satisfaction ratings for CCWater 2014 and 2017	23
Figure 10: Overall satisfaction ratings with CCWater in 2017 (individual scores).....	24
Figure 11: Importance of having an organisation with CCWater’s role: 2014 and 2017 compared.....	26
Figure 12: Perceptions of CCWater’s performance in fulfilling its statutory role to represent the interests of consumers: 2014 and 2017	28
Figure 13: Importance of specific functions for the role of consumer representative 2017 ..	30
Figure 14: Change in importance of CCWater performing specific functions in its role as a consumer representative: 2014 to 2017	31
Figure 15: Change in importance of CCWater working with other actors in the water industry in its role as a consumer representative: 2014 to 2017	32
Figure 16: Change in importance of CCWater pressing for safe, reliable and sustainable service sin its role as a consumer representative: 2014 to 2017	32
Figure 17: Change in importance of putting customers at the heart of the Price Review process to ensure fair affordable bills which are value for money in its role as a consumer representative: 2014 to 2017	33
Figure 18: CCWater’s success in performing specific functions in its role as a consumer representative 2017.....	34
Figure 19: Change in CCWater’s success in performing specific functions in its role as a consumer representative: 2014 to 2017	35
Figure 20: Change in CCWater’s success in pressing for services which are right first time, including safe, reliable and sustainable sewerage services: 2014 to 2017	36
Figure 21: Change in CCWater’s success in working with other actors in the water industry: 2014 to 2017	36
Figure 22: Change in CCWater’s success in putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money	37
Figure 23: Key driver analysis: combined importance and success scores 2017	40
Figure 24: Key driver analysis: combined importance and success scores 2017 (enlarged view of top right section of Figure 23	41
Figure 25: Perceptions of CCWater on functional attributes 2017	43
Figure 26: Change in perceptions of CCWater on functional attributes 2007, 2014, 2017	45
Figure 27: Degree to which stakeholders feel informed about CCWater overall: 2014 and 2017	48
Figure 28: Amount of information received from CCWater: 2014 and 2017.....	49
Figure 29: Preferred means of communicating with CCWater 2007, 2014 and 2017	50

Figure 30: Likelihood of taking notice of different communication methods from CCWater if it is on a subject of interest.....	51
Figure 31: Change in likelihood of taking notice of different communication methods from CCWater if it is on a subject of interest: 2014 to 2017.....	52
Figure 32: Frequency of visiting CCWater’s website in the past year	53
Figure 33: Perceptions of CCWater’s website in 2017	54
Figure 34: Perceptions of CCWater’s ‘On-Tap’ E-Bulletin: 2014 and 2017.	55
Figure 35: Awareness of CCWater’s projects and activities aimed at consumers in 2017	57
Figure 36: Awareness of CCWater’s reports and company data in 2017	60
Figure 37: Level of agreement with statements about CCWater’s communications	63
Figure 38: Level of agreement with statements about CCWater’s communications: means scores 2014 and 2017	64
Figure 39: Agreement with CCWater’s approach to signposting: 2014 and 2017	69
Figure 40: Effectiveness of CCWater as a consumer advocate: 2014 and 2017	71

List of Tables

Table 1: Primary stakeholders: target interviews and depth interviews achieved	6
Table 2: Secondary and tertiary stakeholders: target interviews and interviews achieved	7
Table 3: Available sample and achieved interviews	7

**All work conducted to the market, opinion and social research
International Standard ISO 20252:2012**

Foreword

I would like to thank everyone who took the time to take part in this valuable research to help CCWater explore how we can enhance our performance and our relationships with a wide range of stakeholders.

I am pleased to see that satisfaction with CCWater's performance remains high. Stakeholders' rating of our performance in carrying out our statutory role to represent the interests of water consumers appears to have risen. So, too, has the importance stakeholders place on having a consumer champion for the water sector.

But there is always room for more improvement. It is clear from stakeholders' feedback that there are some gaps for us to address, including being more collaborative and working in partnership with the sector – and beyond - for the benefit of consumers.

CCWater now engages with many more stakeholders than we did a few years ago and in this latest wave of research we sought the views of some people with whom we are still developing our relationship. The research shows that we have some work to do to raise understanding of what CCWater does, especially among secondary and tertiary stakeholders. With that in mind, we plan to run a campaign over next 12 months to explain to stakeholders who are relatively new to CCWater how and why we work on behalf of consumers.

In response to stakeholder feedback, we plan to make more effective use of the communication channels preferred by stakeholders, including more regular, tailored email updates, face-to-face meetings and targeted events. Although stakeholders like the content of our website they thought we could do something to improve its look and feel. Since the research was carried out we have addressed this by improving the structure and navigation of our site so that consumers and stakeholders can find the information they need quickly and easily. We have also simplified the language we use to make the content much more consumer friendly.

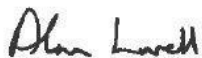
There were differing opinions among stakeholders as to whether we needed to raise CCWater's profile among consumers generally, or focus on those who need our help most. We will continue work both with and through different groups of stakeholders to ensure that those people they represent know how to find us when they have an unresolved complaint or a water-related issue. We are already working hard to raise our profile with the media at a local level and we will also explore how we can optimise digital technologies to reach a wider base of consumers. We have made a start on this by recruiting a dedicated social media officer to drive forward our work in this area.

Stakeholders are keen for us to be more proactive as a consumer advocate. In addition to sharing good practice across the industry and publishing a series of 'think pieces' to encourage debate and conversation on the key challenges facing consumers, we aim to demonstrate the impact we are having in delivering improvements for consumers through the increased use of case studies, videos and infographics.

There is a perception among some stakeholders that other organisations are moving into areas of work that CCWater should, as the consumer representative, consider its own. Our approach is to seek collaboration and ways to enhance our impact by working with partners wherever we can. One of the areas mentioned is support for vulnerable customers. We are seeking to increase our impact in this area and, as our report 'Staying Afloat: Customer vulnerability in the water sector'¹ (September 2017) shows, we are escalating our efforts to work with water companies, regulators and governments to ensure the sector provides the support needed by customers in financial hardship.

Equally, stakeholders would like us to show what we are doing to put customers at the heart of the 2019 Price Review. Since the research was carried out we have stepped up our activity to ensure that the price-setting process delivers outcomes that are valued by water customers at a price they find acceptable.

I am pleased to note that, overall, stakeholders value their relationship with CCWater very highly, both at national and regional level. We intend to build on this and are committed to working with you more closely in the future.



Alan Lovell
Chair, Consumer Council for Water
November 2017

¹ www.ccwater.org.uk/research/staying-afloat-customer-vulnerability-in-the-water-sector-2016-2017/

Executive Summary

Introduction

The Consumer Council for Water (CCWater) is the statutory body set up to represent the interests of domestic and business consumers in the water sector in England and Wales. Its role includes making sure consumer interests are at the heart of decision making in the water sector.

Purpose of the Research

CCWater consults with key stakeholders to obtain views on how it can improve its performance. The stakeholders come from a broad range of organisations within the water sector and from organisations outside the sector that have an interest in or are affected by water or sewerage issues.

The sample for the research comprises primary, secondary and tertiary stakeholders. **Primary stakeholders** are decision makers within the water industry e.g. senior management at water companies and regulators. **Secondary stakeholders** are decision makers at organisations outside of, but with an interest in, the water industry, and also non-decision makers at organisations central to the water industry. Finally, **tertiary stakeholders** are those with a general interest in water industry issues but who have more limited contact with CCWater.

CCWater has conducted two previous waves of research with stakeholders in 2007 and 2014. Following the 2014 research, CCWater took into consideration stakeholder views as they made a number of changes across the organisation. In early 2017, Accent conducted a third wave of this research with CCWater stakeholders to update on their subsequent experiences of and perceptions of CCWater, and to find out how CCWater can further enhance the way it works with stakeholders.

Research Context and Timing

Participants were recruited using 612 records provided by CCWater. This was a much larger set than was used in the 2014 research (310), as CCWater have, in that time, sought to increase engagement with the different elements of the water sector and beyond.

CCWater is still developing its relationships with some of this relatively new group and this may explain why there are a greater proportion of 'don't know' and neutral responses in this year's survey. This is most evident in sections 3.6 (understanding of what CCWater does), 4.3 (success of CCWater in performing functions in its role as a consumer representative), 4.5 (attributes describing CCWater), 5.2 (how well informed stakeholders feel about CCWater) and 5.7 (perceptions of CCWater's communications).

This year's research has been conducted at a different place in the regulatory cycle for the water industry compared to the 2014 research which took place in the weeks following the regulator's determinations on the price review. This time it is in the early

stages of the price review. The difference in timing is thought to have influenced the results in some areas, including its success in performing functions in its role as a consumer representative (Section 4.3) and priority areas for service improvement (Section 4.4).

Research Methodology

This research adopts both qualitative and quantitative methodologies. Qualitative research is used when research objectives need exploratory and in-depth investigation - specifically, in this case, to understand in detail the perceptions of CCWater held by its primary stakeholders. This provides insight around broader stakeholder needs and the actions that can be taken to meet them. Quantitative research seeks to measure the prevalence of views within the population of stakeholders i.e. the primary, secondary and tertiary stakeholders.

As was the case in 2014, the dual qualitative and quantitative phases of the research were undertaken in parallel.

Each potential participant was sent a warm-up email signed by CCWater's Chair, Alan Lovell.

In total, 25 depth interviews were conducted with primary stakeholders. Primary stakeholders were asked a mix of qualitative style questions and questions in the survey designed to measure views in a quantitative way and which have been used in previous waves. This enables CCWater to compare stakeholder views on some key questions over time. A further 85 quantitative telephone interviews were conducted with secondary and tertiary stakeholders.

The interviews with took place over a six-week period between late January and early March 2017.

The research was conducted using a sample of stakeholders. The report identifies where changes in the findings from previous waves of the research and differences in findings between stakeholder segments are statistically robust. Where samples sizes are too small to provide definitive comparisons, the findings are caveated using terms including 'seems to' or 'appears to'.

Key Findings and Recommendations

- **Overview:** Some of the measures of performance are similar to 2014, including overall satisfaction, fulfilling its statutory role, success in carrying out specific functions as a consumer representative, its perceived attributes and some aspects of communications. Others appear to have shown greater change, including the importance of having an organisation with CCWater's role, importance of specific functions as a consumer representative, profile, approach to signposting, perceived effectiveness, understanding of what CCWater does, rating of contact, how well informed they feel, likelihood of taking notice of different communications and awareness of activities and reports. The 2017 findings need to be seen in context

that CCWater had been expanding its stakeholder base and is at a relatively early stage in developing relationships with some of them. As such there is a relatively large minority who are less familiar with the organisation. This is likely to have had an impact on findings, particularly in the higher proportion of neutral and don't know answers in 2017 compared with 2014.

- **Overall satisfaction with CCWater:** Across all stakeholders, satisfaction remained high and was up slightly on 2014. Primary stakeholders rated overall satisfaction with CCWater relatively highly and talked in positive terms about their perceptions. A few commented that there was always room for improvement, including more collaboration, closer ties, more partnership working and more stakeholder events. CCWater should consider how it can enhance its relationship with stakeholders through these means.
- **Understanding of what CCWater does:** Primary stakeholders in 2017 felt they understood CCWater better than secondary and tertiary stakeholders. However, across all stakeholders understanding appears to have fallen since 2014. CCWater should therefore engage in more awareness raising of its role and value to stakeholders.
- **Importance of having an organisation with CCWater's role:** Perceptions of the need for an organisation with CCWater's role seems to have increased since 2014. The importance of the specific functions which, as consumer representative for the water industry, CCWater conducts seems also to have increased since 2014. The most important roles were seen to be 'working collaboratively with the industry at national and regional level and with stakeholders' and 'helping consumers with enquiries and complaints'. When primary stakeholders discussed the importance of CCWater's role, much of the discourse surrounded the *need* for such a role. The themes included the current monopoly structure of the market; the need for someone to speak on behalf of consumers and champion their cause; and the need for a separate body to perform this function. These should continue to be key roles for the consumer representative.
- **Success of CCWater in fulfilling its roles:** Perceptions of CCWater's performance in its statutory role to represent the interests of consumers seems to have improved slightly since 2014. When asked about CCWater's success in carrying out specific functions, a larger minority in 2017 than in 2014 were unable to say how successful CCWater was in carrying these out. Among those who were able to give a view, CCWater seems to be seen as slightly less successful in carrying them out. Key driver analysis, which takes into account importance and performance scores awarded by stakeholders, suggests that CCWater should focus attention initially on:
 - Helping consumers with their enquiries and to resolve issues and complaints
 - Pressing the water industry to protect and help vulnerable customers
 - Working collaboratively with the industry at national levels and company level and with stakeholders
 - Putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money.

The next priority would be to improve performance in:

- Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services
 - Providing trusted information evidence and research
 - Engaging with the Government on strategic issues.
- **CCWater’s effectiveness as a consumer advocate:** Overall, stakeholders seem to think CCWater is less effective in 2017 compared with 2014. However, there is a caveat in this finding as the nature of the question asked in 2017 changed which could explain the change in these findings². Primary stakeholders had a range of views about CCWater’s effectiveness as a consumer advocate. Positive views included good engagement of the senior CCWater team, the range of fora they use to engage with stakeholders and consumers, its role in policy discussion, sector specific knowledge, their focus on vulnerable customers and having a good evidence base. Negative views were mostly about CCWater’s role and remit. This included, being more proactive, having a wider role, other organisations moving into CCWater’s space, including Ofwat. CCWater should consider how it can take initiatives to enhance its influence and perceived authority on consumer issues.
 - **Key attributes of CCWater:** Stakeholders were asked to assess the value of CCWater by rating how well certain attributes described CCWater. The attributes which least described CCWater were ‘good at information sharing’ and ‘authoritative’. These were also the only two attributes where perceptions seemed to have fallen between 2014 and 2017. CCWater should therefore act to improve information sharing and perceptions that it is authoritative. The qualitative research suggests that on information sharing action needs to focus on being more proactive, being more selective in what information it shares and ensuring information is up to date. CCWater should consider how it can address these factors. Some stakeholders felt CCWater provided too much information whereas others wanted the organisation to disseminate more information. CCWater should seek to understand individual stakeholders’ needs in order to strike the right balance in the amount of information provided.
 - **CCWater’s profile:**
 - **Overall profile:** most stakeholders did not think that CCWater has enough of a profile to do its job adequately. Secondary and tertiary stakeholders thought it had less of a profile in 2017 than in 2014, although this may reflect the knowledge base of relatively new stakeholders. Among primary stakeholders, opinions were split. Some felt it didn’t matter as the majority of water customers were unlikely to encounter problems and didn’t need to know about CCWater. Others felt the organisation needed to raise awareness among all water consumers, be more prominent in driving the customer agenda and addressing complications from the fact that some of its role is duplicated in other organisations. Given the divergence of views on this matter, CCWater

² Please see footnote 14 on page 70 of the report for an explanation of the differences in how the question about effectiveness was asked in 2014 and 2017.

should consider carefully the pros and cons of taking action to raise its profile further.

- **CCWater’s approach to ensuring consumers who need them can find them:** In the quantitative survey, fewer stakeholders overall in 2017 seemed to think that CCWater had the right approach to ensure consumers who need their help or advice are signposted to them than in 2014. The qualitative research showed that primary stakeholders are broadly happy with CCWater’s approach to signposting. Positive comments included that the approach should be appropriate both in format of channels and the related cost, although a broader range of channels could be tapped, such as Age UK. Others thought the organisation needed to make better use of digital technologies, particularly to reach a younger audience. CCWater should consider how to enhance signposting through these suggested mechanisms.
- **Rating of contact with CCWater:** Overall, stakeholders rated their contact with CCWater highly in 2017, and this seems to have increased slightly compared with 2014. Regional contact continues to be rated more highly than national contact. CCWater should assess whether there are any lessons to be learned from how contact is conducted at regional level and which can be applied to contacts at the national level.
- **CCWater’s Communications positives:** compared with 2014 there were a number of improvements in perceptions:
 - Fewer were unaware of CCWater’s projects and activities. Fewer seemed to be unaware of recently published reports, although this may in part be due to the question on awareness of reports being changed in 2017 to allow stakeholders to register awareness by subject matter rather than solely by name.
 - More appeared to be aware of the Forward Work Programme and the website had positive ratings.
 - Stakeholders seemed more likely to take notice of all forms of communications tested in the survey in 2017 than they were in 2014. Most notice would be taken of stakeholder update emails and least notice would be of social media updates.
- **CCWater’s Communications negatives:**
 - Stakeholders felt slightly less informed in 2017 than they were in 2014, but primary stakeholders felt better informed than secondary or tertiary stakeholders.
 - The proportion feeling they had too little communication from CCWater seems to have risen slightly since 2014. However, overall 65% feel they have about the right amount of communications. Stakeholders suggested CCWater should be more visible, having more events, focusing on providing more relevant information and sharing more information.

- Stakeholders were fairly neutral in assessing the value of CCWater’s overall communications, with the exception of the highest rated aspect “CCWater’s communication is targeted at the right person within my organisation”. Between 2014 and 2017, scores remained stable, except ‘the communications channels used by CCWater are effective’ and ‘CCWater has a good understanding of my organisation and our aims’ where ratings appear to have fallen the most. These should be the priority for CCWater to address.
- CCWater should note that stakeholders’ preferred means of communication are face to face, telephone and email, as was previously the case. However, stakeholder events, included as a communication option for the first time in 2017, is also among the top four methods. The preference for face-to-face and telephone contact seems to have increased since 2014. These findings suggest that communication can be enhanced through face-to-face contact, including events and by email, including the On-Tap email newsletter. The least preferred means is social media, suggesting this is not a priority for CCWater to develop as a means of communicating with stakeholders.

1. INTRODUCTION

1.1 Background

The Consumer Council for Water (CCWater) is the statutory body set up to represent the interests of domestic and business consumers in the water industry in England and Wales. Its role includes making sure consumer interests are at the heart of decision making in the water industry.

The main functions of CCWater are to:

- keep itself informed of consumer matters and the views of consumers throughout England and Wales
- make proposals, provide advice and information and represent the views of consumers to public authorities, companies holding an appointment as a water or sewerage undertaker, and anyone else whose activities may affect the interests of consumers
- seek to resolve specific complaints from consumers
- provide consumers with information and advice
- publish information and advice in their interests.

CCWater consults with key stakeholders to obtain views on how it can improve its performance. The stakeholders come from a broad range of organisations within the water sector and organisations outside the sector that have an interest in or are affected by water or sewerage issues. CCWater has categorised stakeholder groups as follows:

- Business customer group
- Customer Challenge Groups (CCGs)
- Consumer and charity
- Media
- Utilities
- Water (mainly water and sewerage and water only companies)
- Representative, professional and industry bodies
- Environment
- Regulatory

Stakeholders are further categorised into primary, secondary and tertiary groups:

- **Primary stakeholders** are decision makers within the water industry, such as senior management – CEOs, Chairs, MDs - at water companies and regulators like Ofwat and the Drinking Water Inspectorate (DWI).
- **Secondary stakeholders** are decision makers at organisations outside of, but with an interest in, the water industry (like consumer or environmental organisations); or non-decision makers at organisations central to the water industry.

- **Tertiary stakeholders** are those people with a general interest in water industry issues (like consultants) but who have limited contact with CCWater compared with primary and secondary stakeholders.

CCWater has conducted two previous waves of research with stakeholders in 2007 and 2014. They made a number of changes across the organisation following the last consultation.

In 2017, Accent conducted a third wave of this research with CCWater stakeholders to update on their subsequent experiences of and perceptions of CCWater, and to find out how CCWater can further enhance the way it works with stakeholders.

CCWater will use the outputs of the research to:

- inform the development of its stakeholder strategy and ensure that it meets their key Forward Work Programme business objectives under the 'Speaking Up For and Informing Household and Business Consumers' work stream.
- develop a plan to help CCWater to:
 - deliver a research programme that reflects consumer and stakeholder perspectives on areas where CCWater can make a positive difference.
 - enhance CCWater's role as the independent voice of water consumers so that opinion formers and media seek their comment and views on relevant issues.

1.2 Objectives

The overall aim of the research is to explore how CCWater can improve its performance overall in:

- Collaboration and partnership
- Understanding stakeholder organisations
- Communication

The specific aims are to update the 2007 and 2014 research findings and evaluate stakeholder perceptions of CCWater's performance to date in the following areas:

- How CCWater has engaged with key stakeholders to enhance consumer representation.
- Whether stakeholders are satisfied with the quantity and quality of CCWater input to projects and consultations.
- To understand if CCWater's stakeholders trust them as a source of reliable information.

- Identify whether CCWater has established or should establish a strong public profile.
- Whether stakeholders believe that CCWater has developed strong evidence-based policy.
- Whether stakeholders believe that CCWater has been influential in putting consumers at the heart of decision making and price setting in the water industry.
- CCWater's commitment to the delivery of their Forward Work Programme and Vision Statement.
- The usefulness to stakeholders of the CCWater website.

2. METHODOLOGY

2.1 Chapter summary

This chapter sets out how the research was undertaken.

2.2 Methodology

Research topics

The research sought stakeholder opinions on 8 aspects of CCWater's work:

1. Relationship with CCWater
2. Importance of CCWater's role as a consumer representative organisation
3. Perceptions of CCWater's performance
4. Attributes describing CCWater
5. Communications from CCWater
6. Communications with CCWater
7. Overall satisfaction with CCWater

It also sought profiling information on participants.

For the most part, the research questions replicated those asked in the 2014 survey to allow tracking of changes in stakeholder views. In reporting 2007, data is also included where the questions asked are comparable with 2014 and 2017.

Research Methods

The research was conducted in two ways:

- Qualitative research (depth interviews) with primary stakeholders, with the addition of quantitative questions.
- Quantitative research with secondary and tertiary stakeholders.

The primary, secondary and tertiary participants were all asked a common core set of quantitative questions so that the quantitative element of the project included data for the primary stakeholders.

However, some of the quantitative questions were only asked of secondary and tertiary stakeholders.

Also, some the primary stakeholders were unable to complete all of the quantitative questions due either to time constraints or because they did not wish to.

This means that some of the data will have different base sizes.

The quantitative questionnaire was tested using a pilot. The full quantitative interviews took on average 23 minutes to complete. The questionnaire can be found in Appendix C.

The qualitative element was used to explore a number of themes in greater depth with primary stakeholders. Because of the closer relationship CCWater has with this audience participants were able to provide a great deal of rich and detailed data from a relatively small number of individuals on the research topics. This was used to generate insights around broader stakeholder needs and the actions that can be taken to meet them. These interviews took about one hour to complete.

The combined qualitative/quantitative topic guide is in Appendix D. Quotes from the interviews are included where participants gave permission for their comments to be used. A number of participants did not give permission. This meant that not all points in this report could be illustrated by verbatim quotes. Instead their comments were gathered under common themes, and summarised.

Given the topics discussed and the time available to senior executives in the organisations approached, one-on-one depth interviews were used to conduct the research rather than focus groups. Participants were given the choice of conducting the interview in person or by telephone. All chose to be interviewed by telephone.

Recruitment and Interviewing

Participants were recruited using records provided by CCWater. There were 612 records provided. This was a much larger set than was used in the 2014 research (310), as CCWater have, in that time, sought to increase engagement with the different elements of the water sector and beyond.

Each potential participant was sent a warm-up email signed by CCWater's Chair, Alan Lovell. This was to raise awareness that the research was taking place, explain why it was being done, invite stakeholders to take part and explain that Accent may be in touch to seek an interview. There was one email for primary stakeholders and another for secondary and tertiary stakeholders. These are in Appendices A and B for reference.

Recruitment and interviewing for the combined quantitative/qualitative element and the quantitative element ran more or less in parallel.

All primary stakeholders in the client's records were sent the warm-up email on 16 January 2017 and recruitment and interviewing proceeded by telephone between 24 January and 1 March 2017.

For the quantitative survey, where there was more than one contact in any particular organisation, half were sent the warm-up email on 16 January 2017. Recruitment and interviewing then proceeded from 18 to 24 January 2017 for the pilot phase and from 2 February 2017 for the main phase. The remaining stakeholders were sent the same

email on 15 February 2017 and recruitment and interviewing was conducted from the same date.

The reason for staggering the distribution and recruitment was to avoid contacting too many stakeholders within the same organisation in a short period of time which could lead to confusion and annoyance. Interviewing was completed on 28 February 2017.

Sample Size and Structure

CCWater requested that 25 interviews be conducted with primary stakeholders to be consistent with the 2014 survey approach. The target sample of interviews was spread proportionately between the different stakeholder groups. The fieldwork achieved 25 interviews, with the spread being close to the target set (see Table 1).

Table 1: Primary stakeholders: target interviews and depth interviews achieved

Primary Stakeholder Groups	Target	Achieved
Business customer group or Environment (1 achieved in the Environment group)	1	1
Consumer and Charity	1	1
Water	17	18
Government	2	1
Regulatory	4	4
Total	25	25

There were 10 pilot quantitative interviews. The pilot survey sample was structured to be proportional to the representation of secondary and tertiary stakeholders in the different stakeholder groups. The fieldwork achieved the target spread of interviews across these groups.

The main phase of the quantitative survey sought 75 interviews to be consistent with the number achieved in the 2014 survey. As in the pilot, the survey sample was structured to be proportional to the representation of secondary and tertiary stakeholders in the different stakeholder groups.

The fieldwork achieved interviews in all stakeholder groups, although in some cases it did not achieve the exact quota for interviews across each target group. This was because all of the contact records in some of the smaller groups were entirely used up without achieving the target number of interviews. With CCWater's permission, Accent made up the shortfall in total numbers where it was possible to achieve additional interviews in other stakeholder groups.

As the pilot survey found that no changes were needed to the content of the questionnaire, the data was added to the main stage findings (see Table 2).

**Table 2: Secondary and tertiary stakeholders: target interviews and interviews achieved
In the quantitative survey**

Quantitative Targets	Target	Achieved
Business customer group	12	6
Customer Challenge Groups (CCGs)	4	5
Consumer and Charity	9	11
Media	3	3
Utilities	2	1
Water	26	33
Representative, professional and industry bodies	8	4
Environment	10	10
Government	5	4
Regulatory	6	8
Total	85	85

The overall sample achieved from the primary, secondary and tertiary stakeholders was 110 interviews, 10 above the original target. The spread of interviews achieved and the total available contact records are shown in Table 3.

Table 3: Available sample and achieved interviews

Stakeholder Groups	Total		Primary		Secondary/Tertiary	
	Available	Achieved	Available	Achieved	Available	Achieved
Business Customer Group	84	6	1		83	6
Customer Challenge Groups (CCGs)	26	5	0		26	5
Consumer and Charity	61	12	2	1	59	11
Media	13	3	0		13	3
Utilities	18	1	0		18	1
Water	211	51	40	18	171	33
Representative, professional and industrial bodies	52	4	0		52	4
Environment	67	11	1	1	66	10
Government	36	5	5	1	31	4
Regulatory	44	12	10	4	34	8
Total	612	110	59	25	553	85

Based on a sample universe of 612, and a 95% confidence level, the total sample of 110 stakeholders provides a statistical margin of error varies depending on the distribution of responses as shown below:

- 50%/50% +/-8.5%
- 30%/70% +/-7.8%
- 20%/80% +/-6.8%
- 10%/90% +/-5.1%

Data for sub-samples of primary, secondary and tertiary stakeholders, as well as individual stakeholder groups, are too small to allow for robust conclusions to be drawn. Notable differences between the sub-samples are discussed throughout this report but are not presented graphically as this data cannot be considered statistically robust.

A feature of the 2017 research was a higher proportion of 'don't know' responses to some questions compared with the 2014 research. This may be due to the change in the number and structure of CCWater's stakeholders since then. CCWater have increased their range of contacts and some of these people may not have had time as yet to develop a level of contact and/or knowledge of CCWater.

A higher proportion of 'don't know' answers can affect comparisons between different sets of percentage figures. So, in some cases, mean scores have been used to allow direct comparisons of findings between stakeholders who were able to express views on the research topics. This is used particularly when comparing 2014 and 2017 findings. Percentage data is still presented, however, to show where 'don't know' responses occur.

3. STAKEHOLDER RELATIONSHIPS

3.1 Chapter summary

General opinions of CCWater: These were positive. Primary stakeholders had the view that it is important to have a ‘customer’ champion working on behalf of customers within the industry. This was also the most common view expressed by secondary and tertiary participants. Primary stakeholders thought CCWater could be more forward looking and focus on core strategy. Secondary and tertiary stakeholders’ negative or neutral views centred on the organisation’s profile rather than on its role or how it carries it out.

Stakeholder involvement with CCWater: This was mainly in connection with consultation, consumer representation and policy development. The most common frequency of contact was about once every two to three months (35%). The majority of primary stakeholders felt close to CCWater, describing them as a partner or friend. Secondary and tertiary stakeholders were more likely to describe CCWater as a colleague. Perceptions have changed little since 2014. Most contact was with national England and regional England staff.

Rating of contact with CCWater: Overall, stakeholders rated their contact with CCWater highly in 2017, and this seems to have increased slightly compared with 2014. Regional contact continues to be rated more highly than national contact.

Understanding of what CCWater does: This appears to have fallen since 2014 (down from 4.31 out of 5 to 3.93 out of 5). Primary stakeholders in 2017 felt they understood CCWater better than secondary and tertiary stakeholders (88% vs 71%).

3.2 General opinions of CCWater

In the 2017 survey, primary, secondary and tertiary stakeholders were asked about their general views of CCWater.

Many primary stakeholders spoke positively and provided constructive comments about CCWater. Positive themes from the qualitative element of the research included the following:

- The importance of having such a customer ‘champion’ working on behalf of customers within the industry.
- Strong relationships with CCWater, particularly referencing strong working relationships at a local level.

“That’s right, yes. So I would consider CCWater to be one of my principal stakeholders...I find them to be very committed and competent people. So I would say my relationship with CCWater is good, actually. I find them pragmatic and - yes, I find them to be quite pragmatic and balanced.”

Primary Stakeholder, Water

However, others did raise some concerns/suggestions for improvement surrounding developments for the changing market and working within their core strategy:

“I think we would want them to, I think, be more forward looking. There's a sense in which I've said several times they're still approaching in the way kind of like five years ago or longer than that and actually we would want them to be one step ahead for the benefit of customers just to be really much more of an influence there both within and outside the sector.”

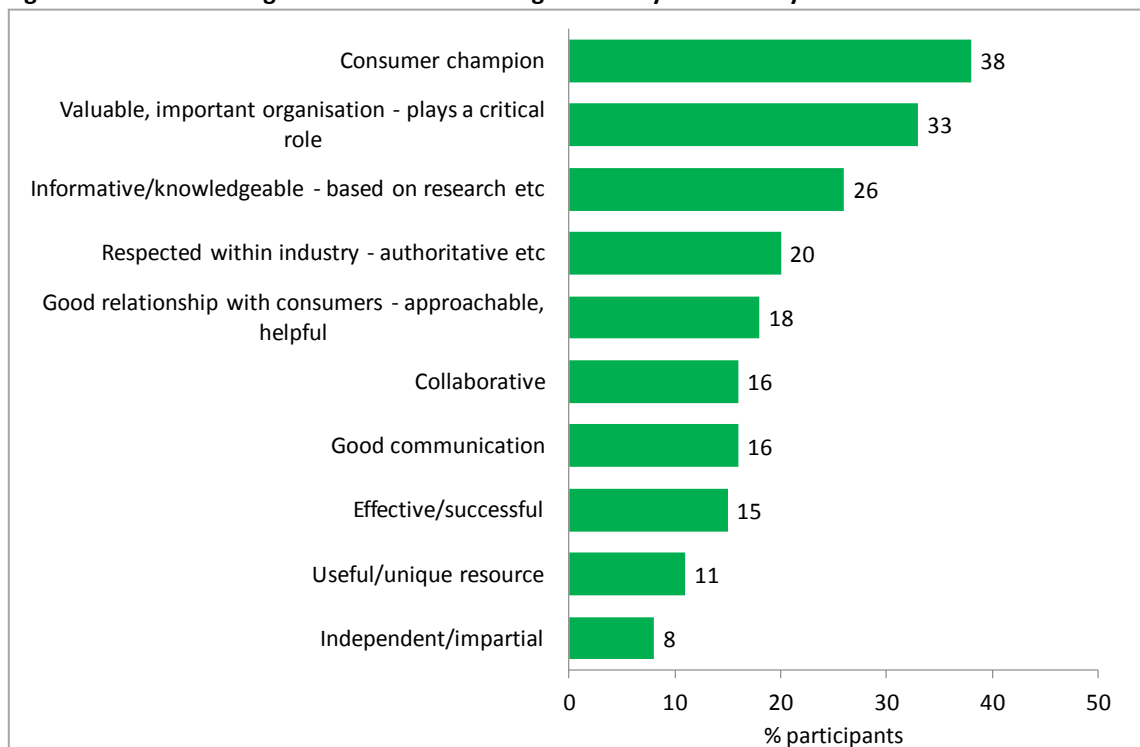
Primary Stakeholder, Regulatory

“...the market is changing; that's not necessarily a sign that performance has declined, but rather that the challenges have increased. [...] They need to go through a culture change and a transformation programme. A rethink is needed on their strategic approach; the challenge for them is to understand how the market changes what they do.”

Primary Stakeholder, Water

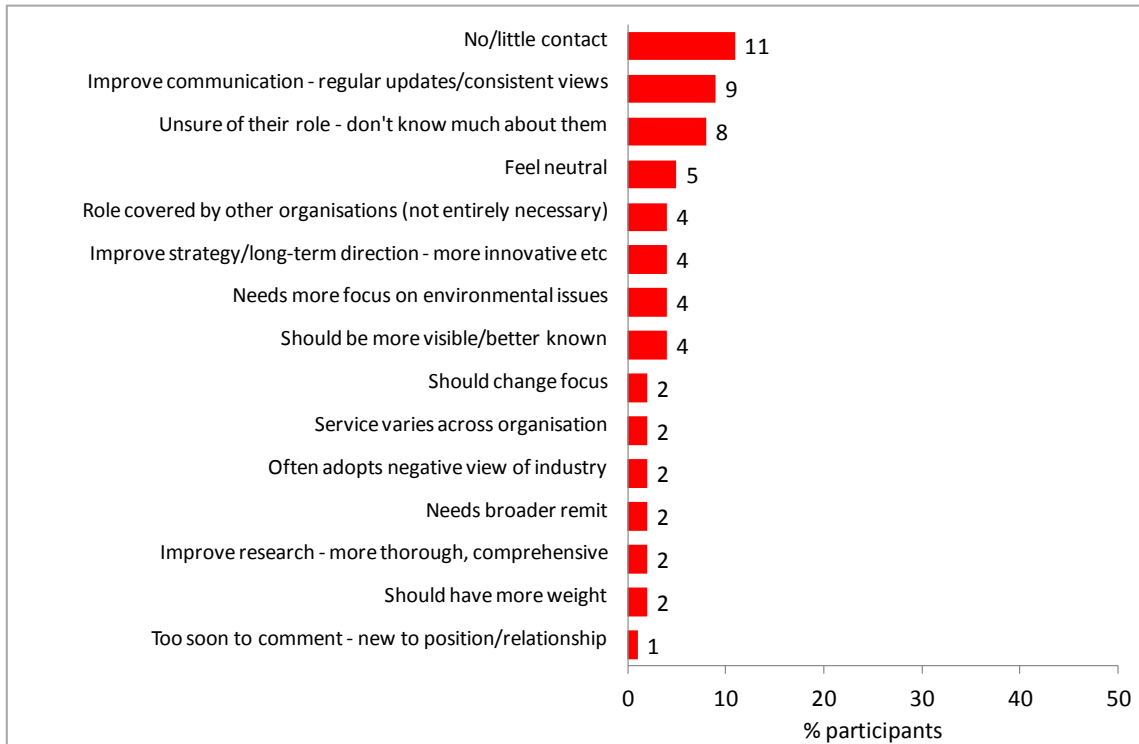
Secondary and tertiary stakeholders were asked to state in their own words how they felt about CCWater at the start of the interview. The open responses have been coded and quantified with the positive feelings shown in Figure 1 and the neutral and negative views set out in Figure 2.

Figure 1: Positive feelings about CCWater among secondary and tertiary stakeholders in 2017



Base: Secondary and tertiary stakeholders (85)

Figure 2: Negative feeling about CCWater among secondary and tertiary stakeholders in 2017



Base: Secondary and tertiary stakeholders (85)

These two charts show that the proportions expressing negative or neutral views about CCWater were very much smaller than those expressing positive ones.

The positive perceptions focus on CCWater’s role and positive style of engagement. The most frequently cited feelings about CCWater were:

- **38%**: a consumer champion
- **33%**: a valuable important organisation playing a critical role
- **26%**: informative and knowledgeable based on research
- **20%**: respected within the industry.

The neutral or negative comments were more about the profile of CCWater than about its role or how it carries it out:

- **11%**: stakeholders had little or no contact with CCWater
- **9%**: communications should improve, particularly in giving more regular updates and providing a consistent set of views on topics.

- **8%**: stakeholders were unsure of CCWater's role.

More of the tertiary stakeholders than secondary stakeholders seemed to express the neutral or negative comments.

There was no clear, consistent pattern of perceptions across the stakeholder groups:

- No participants from the business customer group, Customer Challenge Groups or media participants mentioned CCWater as a **consumer champion**. Mentions mainly came from regulators.
- Mentions of CCWater as a **valuable** and **important organisation** appeared to be above average in the water segment.

Caution must be used when interpreting findings between the different stakeholder groups, here and elsewhere, as the sample sizes are very small. However, we include them to be viewed in a more 'qualitative' sense. In this case, although the proportions expressing both positive and negative views about CCWater appear small in relation to the overall sample size, it must be remembered that these are top of mind opinions obtained without any form of prompting. More structured questions asked later in the questionnaire show that positive perceptions about CCWater were held by a very large majority of stakeholders.

3.3 Involvement with CCWater

In 2017, primary, secondary and tertiary stakeholders were involved with CCWater in a number of ways³.

- **69%** Consultation
- **51%** Consumer representation
- **42%** Policy development
- **29%** Complaint handling

There was no great difference in how primary, secondary and tertiary stakeholders were involved, except in the case of **complaint handling**. 57% of primary stakeholders were involved in this way, as opposed to 24% of secondary and 11% of tertiary stakeholders.

There was no clear pattern of involvement across the stakeholder groups:

- Customer Challenge Group involvement in **consultation** appeared to be above average.

³ The responses are expressed in the terms used by CCWater to classify the kinds of involvement they have had with their stakeholders. Participants were asked to note activity in the past 2 years.

- Government involvement in **policy development** seemed to be above average.
- The consumer and charity segment involvement seemed to be above average for **consumer representation**.

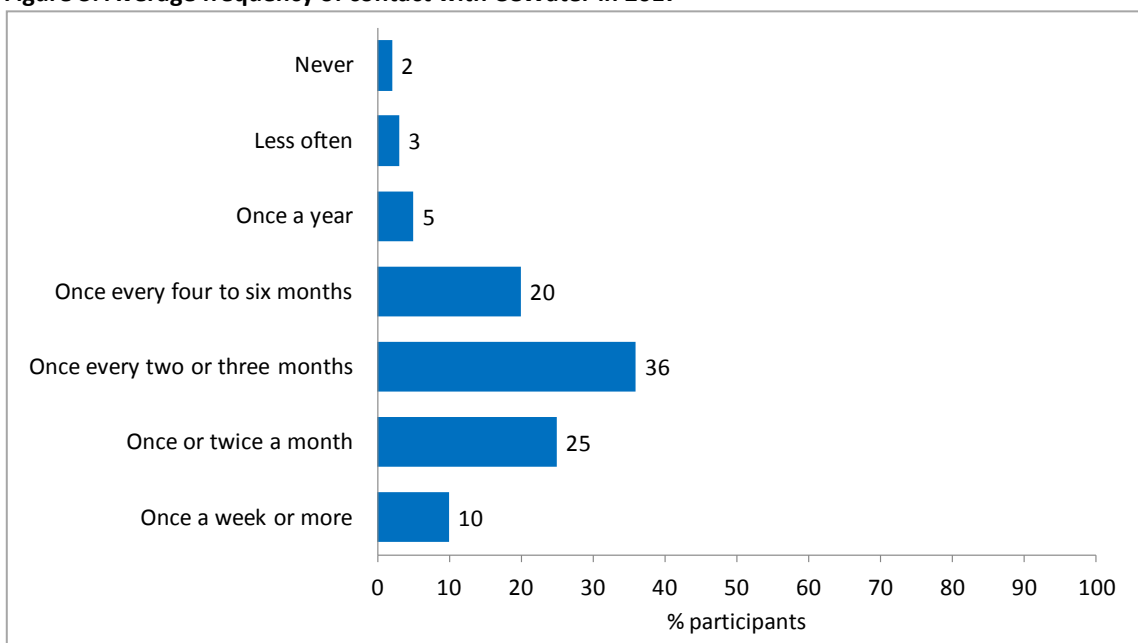
Secondary and tertiary stakeholders fell fairly evenly into those with a water industry remit and those with a broader focus:

- **52%** have a water industry focus
- **47%** have a broader remit

The representative, professional and industry bodies, consumer and charity group, environment groups and government appeared to have much less of an industry focus. By contrast, regulators and the water segment seemed to have much more of an industry focus.

Just over a third (35%) had contact once a month or more. The rest were fairly evenly split between longer periods of time between contacts (see Figure 3).

Figure 3: Average frequency of contact with CCWater in 2017



Base: Primary, Secondary and Tertiary Stakeholders (106)

There were no notable differences in the level of contact between primary, secondary and tertiary stakeholders who had contact once a month or more.

3.4 Relationship with CCWater

CCWater uses a hierarchy analogy model to describe the relationship stakeholders feel they have with the organisation. The hierarchy ranges from a very distant to a very close sense of that relationship:

- Partner - very close with shared values
- Friend - close with shared experiences
- Colleague - shared goals
- Acquaintance - not close
- Stranger - not at all close.

The majority of primary stakeholders felt close to CCWater, the rest mainly saw themselves having a 'Colleague - shared goals' relationship; again, indicative of a 'linking' relationship.

Whilst not a majority, a notable number of primary stakeholders commented on the language of the relationships outlined in the hierarchy analogy model. Some found the question initially difficult to respond to and/or felt the language perhaps not quite defining the professional relationship with an organisation they perceived as a 'regulator'.

"It's a critical friend rather than a friend in the traditional word?"

Primary Stakeholder, Water

"So clearly, I would actually align with a colleague and a friend and [sic read: in] some areas... we are independent so I wouldn't put myself on a par as a colleague or a friend; they feel wrong."

Primary Stakeholder, Regulatory

There was also some sense that some level of distance was required to maintain a professional relationship.

"I put it as three⁴ and my interpretation of your question is I'm happy with it being three, is that they've got a real responsibility to be consumer advocates, and I think there's a certain amount of distance that they could and should and do keep between themselves and the companies, otherwise I fear that that might get a bit blurred"

Primary Stakeholder, Water

Of those who commented, many mentioned that they were happy with the relationship and/or it was appropriate. A small number of primary stakeholders did wish for a stronger relationship but these were in the minority.

[Happy with level of relationship] "I think so, yes, I do. I think it is important that, whilst seeking to tackle and improve – and there's a very strong guidance

⁴ In this case a '3' means a 'colleague – with shared goals'

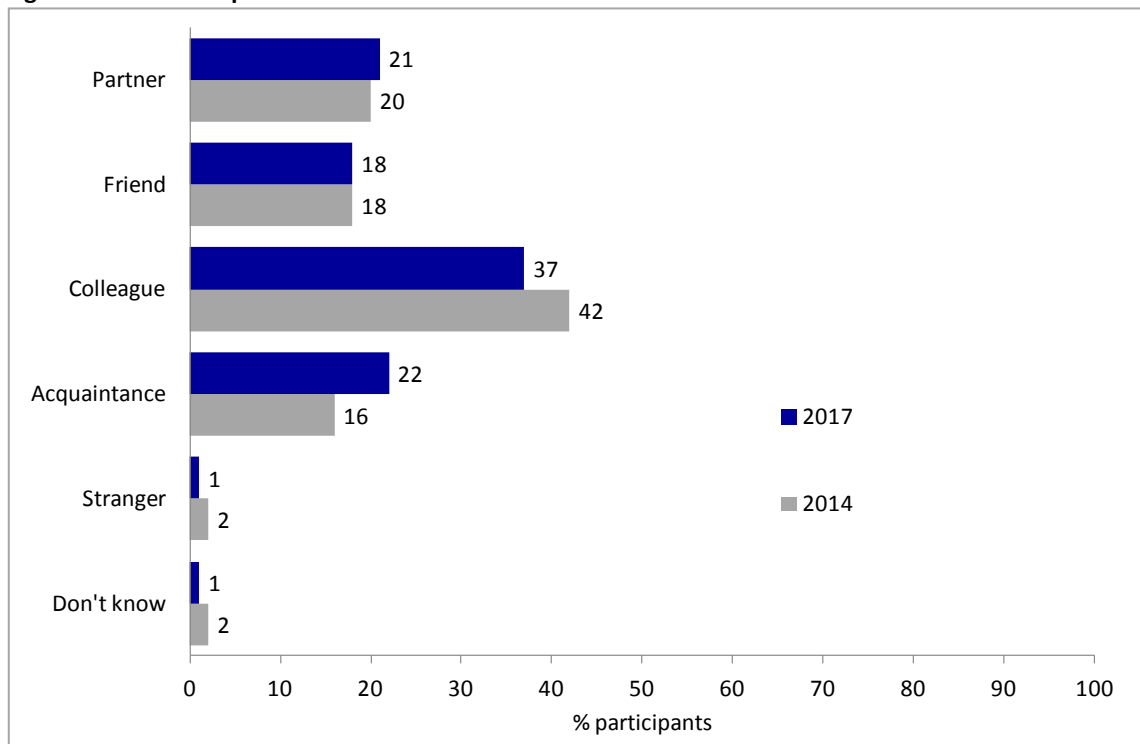
for having good, professional relationships in order to help us all improve – is a good thing, but there are inevitable limits to that, and that's okay.”
 Primary Stakeholder, Water

“...the relationship you have is the appropriate one?” “That would be my view, yes.”
 Primary Stakeholder, Water

“Are we working in partnership? No, I don't think we are working in partnership. Should we be? That's, I think, another question; perhaps that's what we might aspire to be and I don't think we're there yet.”
 Primary Stakeholder, Regulatory

Overall, the perceived relationship in 2017 was very similar to what was found in 2014, with most considering CCWater to be a colleague. There was a slight fall in the proportion considering CCWater as a colleague, with more thinking of them as an acquaintance (see Figure 4). This may reflect the expansion of CCWater’s stakeholder base since the last survey in 2014. In 2017 proportionately more stakeholders were classified as secondary and tertiary, where relationships are typically more distant.

Figure 4: Relationship model of stakeholders with CCWater 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=108; 2014=105)

When looking at the different stakeholder types, in 2017 primary stakeholders were almost twice as likely to describe CCWater as a ‘partner’ or ‘friend’ than secondary or tertiary stakeholders:

- **61%** primary stakeholders
- **33%** combined secondary and tertiary stakeholders.

There seemed to be variations across the different stakeholder groups in how they perceived their relationship with CCWater:

- The majority of participants in the Customer Challenge Groups and in the consumer and charity group classified themselves in the 'closer' relationship categories of **partner** or **friend**. Just under half of the water segments saw themselves in this way. No one in the business customer group or among the representative, professional and industry bodies thought of themselves as a partner or friend.
- All of the business customer group and the representative, professional and industry bodies saw themselves as having a more distant **colleague** or **acquaintance** relationship, as did and the majority of participants in the environment, government, media and regulatory groups.
- **Stranger:** one participant (in the environment group) felt this way about the relationship.

Overall, in the qualitative and quantitative elements, the findings suggest stakeholders' relationships are reflective of the 'working relationship' with CCWater, i.e. primary, secondary or tertiary.

3.5 Working relationships with national and regional staff

When discussing the rating of different CCWater teams with primary stakeholders, generally, regional teams were viewed more favourably. Reasons for why this might be were unclear. However, it would not be unreasonable to assume that this could be related to the closer working relationships that some primary stakeholders had with regional teams.

"I think for the people I deal with, I think they do well, so I can't say that they could do any better. I'm not so sure about the central staff."

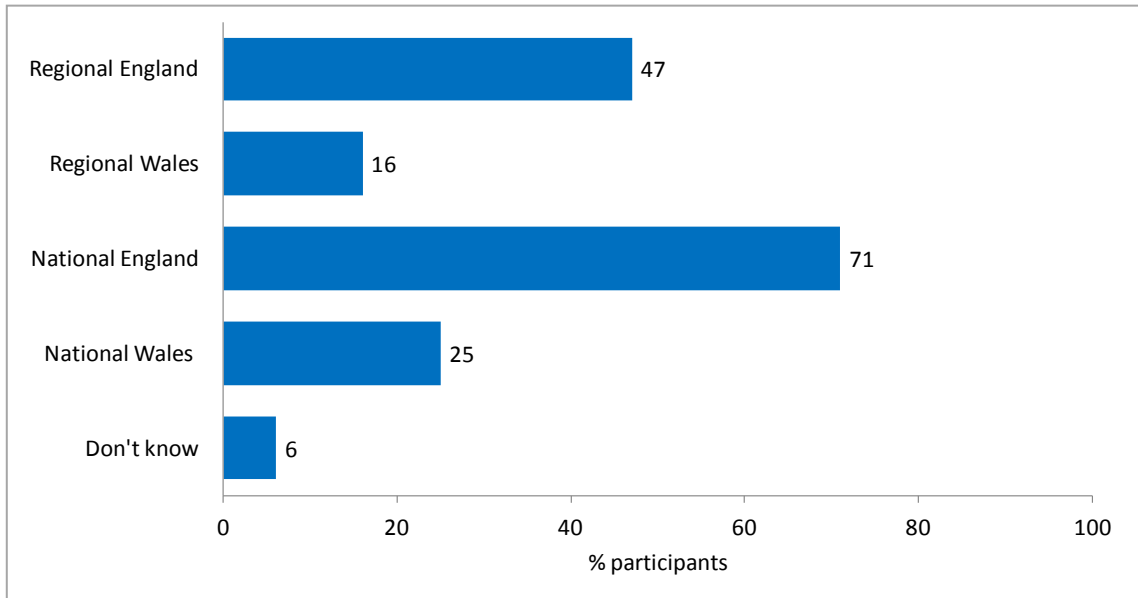
Primary Stakeholder, Water

[Regional Team] "Very good. 5." "The national team?" "On a needs-basis really, so how do you rate that? I don't know. 3 [average]. Not that I want more of it. It's just it is what it is."

Primary Stakeholder, Water

In 2017, most stakeholder dealings were at the national England level, as Figure 5 shows. Almost three-quarters of participants had dealings at this level. Just under half had dealings with regional staff in England.

Figure 5: Proportion who had dealings with national and regional staff in 2017



Base: Primary, Secondary and Tertiary Stakeholders (106)

Stakeholders were asked to assess the contact they had with CCWater using a rating scale of 1 to 5 where 1 is 'very poor' and 5 is 'very good'. Overall, they rated their contact highly in 2017 and this appears to have risen slightly since 2014. In both 2014 and 2017 stakeholders seem to rate regional contact more highly than national contact.

Data for England and Wales at both regional and national level has been combined as the base sizes for Wales are too small to give reliable findings.

Rating of national contact:

2014: **4.03**

2017: **4.24**

Rating of regional contact:

2014: **4.26**

2017: **4.39**

For both regional and national stakeholders, the improved ratings were driven by an increase in the proportion who gave CCWater a 'very good' rating.

National contact rated as 'very good':

2014: **27%**

2017: **41%**

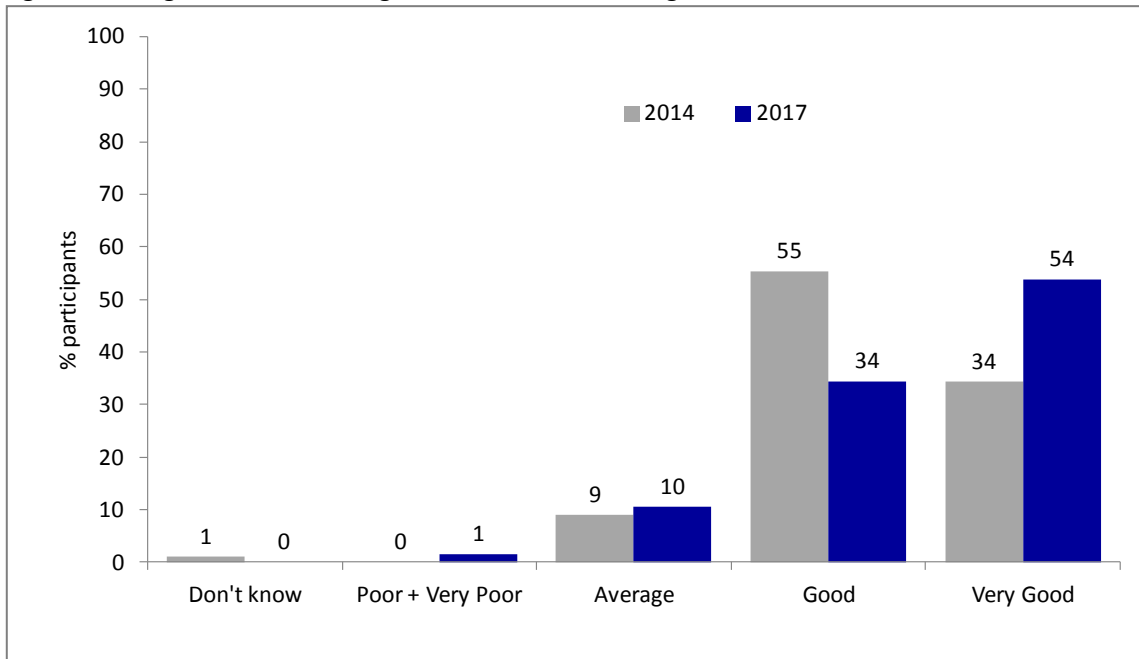
Regional contact rated as 'very good':

2014: **34%**

2017: **54%**

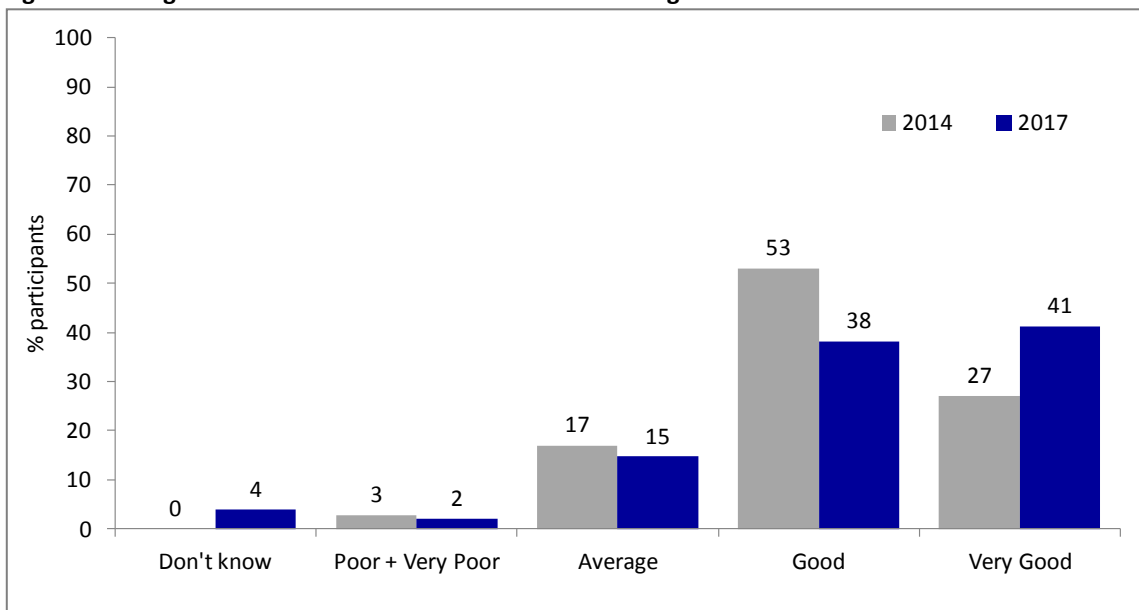
The full breakdown of contact ratings are shown in Figure 6 and Figure 7.

Figure 6: Rating of contact with regional CCWater staff in England and Wales 2014 and 2017



Base: All who deal personally with CCWater (2017=67; 2014=67)

Figure 7: Rating of contact with national CCWater staff in England and Wales 2014 and 2017



Base: All who deal personally with CCWater (2017=102; 2014=64)

3.6 Understanding what CCWater does

A number of primary stakeholders commented that their level of understanding was sufficient for their role; their seniority meant that operational/process knowledge was not required for their relationships. There were some occasional references to changes in structure/organisation and the role CCWater are/should be performing, but broadly the level of understanding was high.

A very small number of primary stakeholders were less sure about their understanding. Issues raised here surrounded: a dissonance between the role of CCWater and their requirements; a gap in their knowledge; variability in understanding depending on circumstances.

"I think I have as much as I need, recognising that I'm a [role] and most of the relationship goes between the executives of both organisations."

Primary Stakeholder, Water

"I think I understand what they do pretty well, yes....I don't think I need to know more."

Primary Stakeholder, Water

"They just feel a bit distant in some ways, if I'm honest about it, or historically. I think it's improved a little bit, but yes, there's an element of distance."

Primary Stakeholder, Water

"They need a better understanding of what we do and how they can help us rather than the other way round."

Primary Stakeholder, Water

Stakeholders were asked to rate their understanding of what CCWater does using a scale 1 to 5, with 1 meaning 'not at all well' and 5 meaning 'very well'.

This is an area where scores seems to have fallen in 2017, with the mean rating dropping back to levels seen in the 2007 survey:

Understanding of what CCWater does:

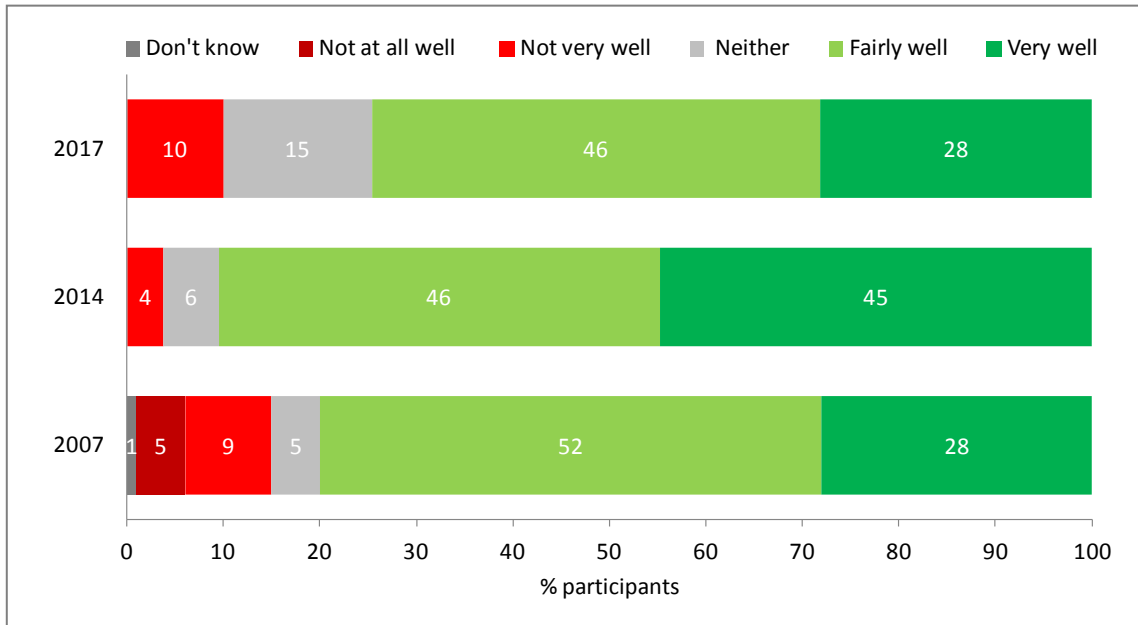
2007: **3.90**

2014: **4.31**

2017: **3.93**

The fall in understanding compared with 2014 appears to be driven by a higher proportion of those feeling neutral about their understanding of what CCWater does (15%) – see Figure 8.

Figure 8: Level of understanding of what CCWater does 2007, 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=110; 2014=106; 2007=100)

Understanding in 2017 was higher among primary stakeholders than for secondary and tertiary stakeholders:

Proportion who understand what CCWater does ‘fairly well’ or ‘very well’:

88% primary stakeholders.

71% combined secondary and tertiary stakeholders.

Among secondary and tertiary stakeholders, when asked for their top of mind opinions about CCWater at the start of the survey, a small number (seven) said they were unsure of CCWater’s role. Four stated that this was because they knew little about CCWater and one because they were new to the job.

These findings suggest that CCWater could valuably raise the level of understanding stakeholders have about the organisation, particularly among secondary and tertiary stakeholders.

4. HOW IS CCWATER PERCEIVED

4.1 Chapter summary

Overall satisfaction with CCWater: Primary stakeholders rated overall satisfaction with CCWater relatively highly and talked in positive terms about their perceptions. A few commented that there was always room for improvement, including more collaboration, closer ties, more partnership working and more stakeholder events.

For all stakeholders, satisfaction remained high (7.3 out of 10) up slightly on the 2014 rating of 7.26.

Importance: When primary stakeholders discussed the importance of CCWater's role, much of the discourse surrounded the *need* for such a role. The themes included the need for such a role given the current monopoly structure of the market; the need for someone to speak on behalf of consumers and champion their cause; and the need for a separate body to perform this function.

The need for an organisation with CCWater's role seems to have increased since 2014 up from 3.16 out of 4 to 3.5 out of 4 in 2017. Perceptions of how CCWater performs its statutory role to represent the interests of consumer also seems to have improved slightly since 2014, with ratings up from 3.39 to 4.44 out of 5.

The importance of a consumer representative in the water industry having specific functions seems to have increased since 2014. The most important were seen to be 'working collaboratively with the industry at national and regional level and with stakeholders' and 'helping consumers with enquiries and complaints'.

Success of CCWater as a consumer advocate: A larger minority in 2017 than in 2014 were unable to say how successful CCWater was in carrying out these functions and this may reflect the early stage at which CCWater is engaging with an expanded base of stakeholders. Among those who were able to give a view, CCWater seems to be seen as slightly less successful in carrying out these functions. Key driver analysis suggests the priorities for CCWater in improving performance. CCWater should focus attention initially on:

- Helping consumers with their enquiries and to resolve issues and complaints
- Pressing the water industry to protect and help vulnerable customers
- Working collaboratively with the industry at national levels and company level and with stakeholders
- Putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money.

The next priority would be to improve performance in the following functions:

- Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services

- Providing trusted information evidence and research
- Engaging with the Government on strategic issues.

Key attributes of CCWater: The attributes which least described CCWater were seen to 'good at information sharing' and 'authoritative'. These were also the two attributes where perceptions seemed to fall between 2014 and 2017. CCWater should therefore act to improve information sharing and perceptions that it is authoritative. The qualitative research suggests that on information sharing action needs to focus on being more proactive, being more selective in what information it shares and ensuring information is up to date. Some stakeholders thought CCWater provided too much information, while others wanted the organisation to disseminate more information. Given these opposing views, CCWater should consider tailoring its information to the needs of different stakeholders.

4.2 Overall satisfaction and importance

Overall satisfaction

Primary stakeholders rated relatively highly and talked in positive terms about their perceptions. A few commented that (despite rating highly) there was always room for improvement. When probed about what could improve ratings, comments surrounded more collaboration, for example: more advance notice on policy; closer ties; more partnership working; more stakeholder events.

"They're a good, professional, well-organised, rational sort of organisation, who have a remit and have a legitimacy and do it to the best of their ability."

Primary Stakeholder, Water

"For me I would give it an eight and my only - the only reason it's not higher is just that I would probably value some stakeholder events⁵ slightly more regularly as they develop their thinking."

Primary Stakeholder, Water

"Well, nothing is perfect, is it, but I think they're good. I'll say this to the end, I am a great supporter of them. I know I sound rather critical, but I think of all the bodies that we deal with that regulate the water industry, there are two that stand out above the rest. One is the Drinking Water Inspectorate and the other one is CCW."

Primary Stakeholder, Water

"If I perceive a need to talk to them I will do so but I get a feeling they don't see a need to talk to us because they don't often - apart from the usual newsletters and the stuff that they send out to probably a database, yes, it's not particularly tailored to us, it's not personalised to us, it's not something special to us so

⁵ CCWater held six consumer issues workshops for stakeholders across England and in Wales in September & October 2015 and a further six in September and October 2016.

we're just another on their database I feel. But perhaps that's right. If they were to have something they thought they needed to talk to us I would hope they would do so and they probably would and the fact it doesn't happen just perhaps defines the relationship and the areas that we do have in common."

Primary Stakeholder, Water

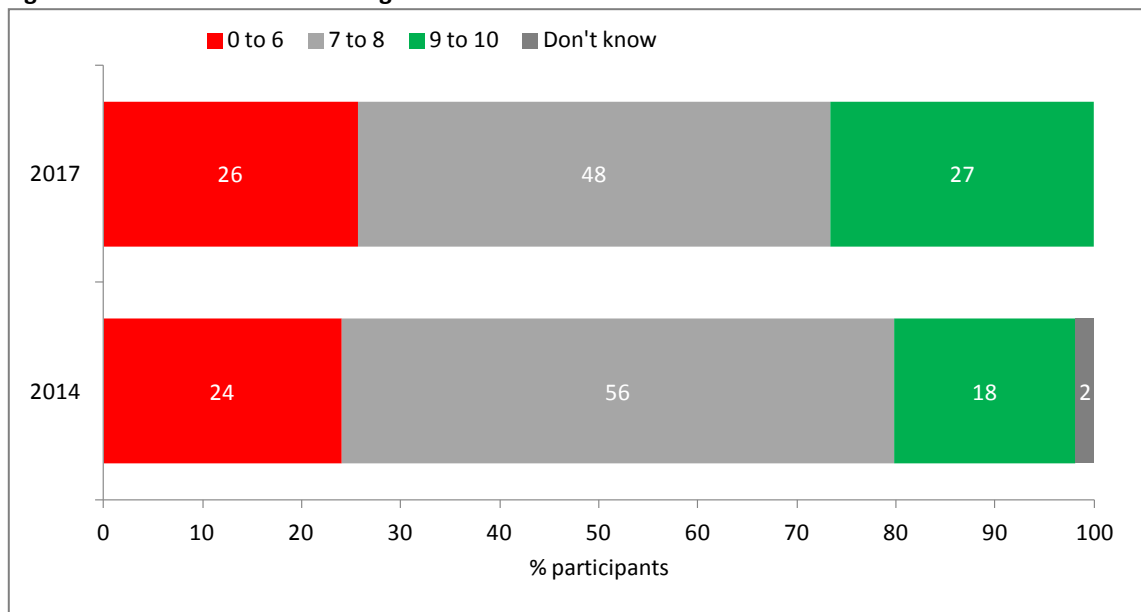
Overall satisfaction with CCWater in 2017 was fairly high and seems to have increased slightly since 2014. Using a scale of 0 to 10, scores out of 10 are shown below:

2014: **7.26**

2017: **7.30**

The improvement in the 2017 score was driven by a higher proportion giving CCWater the highest scores of 9 or 10 as shown in Figure 9.

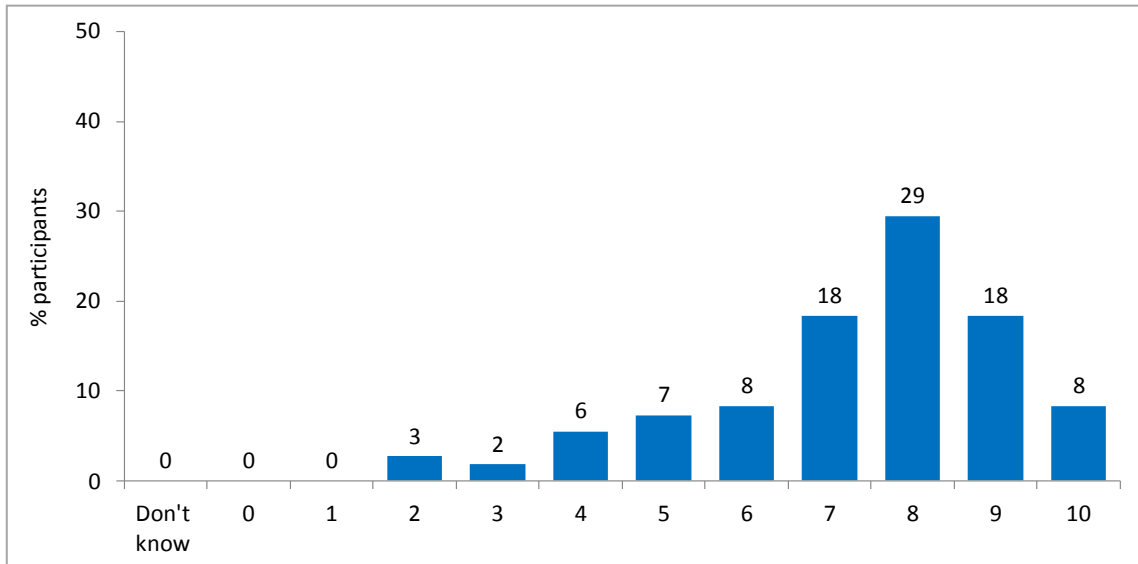
Figure 9: Overall satisfaction ratings for CCWater 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=109; 2014=104)

Within the lowest 0-6 category in 2017, most of the scores were grouped around a rating of 5 or 6 and none were rated 0 or 1 (see Figure 10). The lowest score awarded was a 2, given by only 3% of all participants.

Figure 10: Overall satisfaction ratings with CCWater in 2017 (individual scores)



Base: Primary, Secondary and Tertiary Stakeholders (109)

In 2017, there appears to be a small difference in satisfaction between primary, secondary and tertiary stakeholders with primary being slightly more satisfied:

- **7.42** for primary stakeholders.
- **7.27** for secondary and tertiary stakeholders.

Overall satisfaction appeared to be below average amongst the environment group and within representative, professional and industry bodies. It seemed above average for Customer Challenge Groups and the consumer and charity group.

Importance of the role carried out by CCWater

When primary stakeholders discussed the importance of such a role, much of the discourse surrounded the *need* for such a role. There were a number of themes within this discussion such as: the need for such a role given the current monopoly structure of the market; the need for someone to speak on behalf of consumers and champion their cause; and, the need for a separate body to perform this function.

“I think [to] not have an independent channel for recourse to complain, bearing in mind the structure of the industry, I think would be very wrong. If you left it just to the water companies to deal with their complaints and have no independent body I think that would be leaving it open to abuse”

Primary Stakeholder, Water

“It's a vehicle between the sector and the customer, that isn't the financial regulator... Provides some balance, I think.”

Primary Stakeholder, Water

“...it's a regulated monopoly industry and they've got to be there.”

Primary Stakeholder, Water

“I think, as I said before, if they didn't exist, then I think the customer would lose out; significantly, if they were part of a general consumer body. I think it's really important that they exist. I think they've added value both in the price-setting process in the last review and indeed the review before that. There's all the complaint adjudication that they've done over the years. I think, for what it costs...I think it's really good value for money so it's got to be a, 10.”

Primary Stakeholder, Water

A minority of primary stakeholders did raise some individual concerns around issues such as: disparity between the need for a role and the current performance of CCWater in performing this role; is CCWater strong enough in this role?; avoiding duplication of the remits of other organisations; importance of role but ambivalence as to where it sits; querying the number of escalation levels.

“To have an organisation that carries out the function of - those activities are very important. Where it sits, I'm pretty neutral on.”

Primary Stakeholder, Water

“I think it's very important, but again what I do question is, is we have CCWater who are - you know, it's a second point of escalation, and now we have a third one, which is WATRS⁶ customer protection scheme. Why did we have to engage a further CPS⁷? Why could that not have been dealt with by CCWater?”

Primary Stakeholder, Water

Stakeholders were asked to rate the importance of having an organisation with CCWater's roles on a scale of 1 to 4 where 1 is 'not essential and 4 is 'essential'.

On this measure, stakeholders perceived that it is important to have an organisation with CCWater's role and this sense that it is important appears to have risen since the 2014 survey:

2014 importance: **3.16**

2017 importance: **3.50**

The increase in the score was driven by a sharp rise in the proportion perceiving that it is essential to have an organisation with CCWater's role, up from 27% in 2014 to 57% in 2017 (see Figure 11). Although no direct questions were asked of secondary and tertiary stakeholders to explore why they perceived the role as essential, general

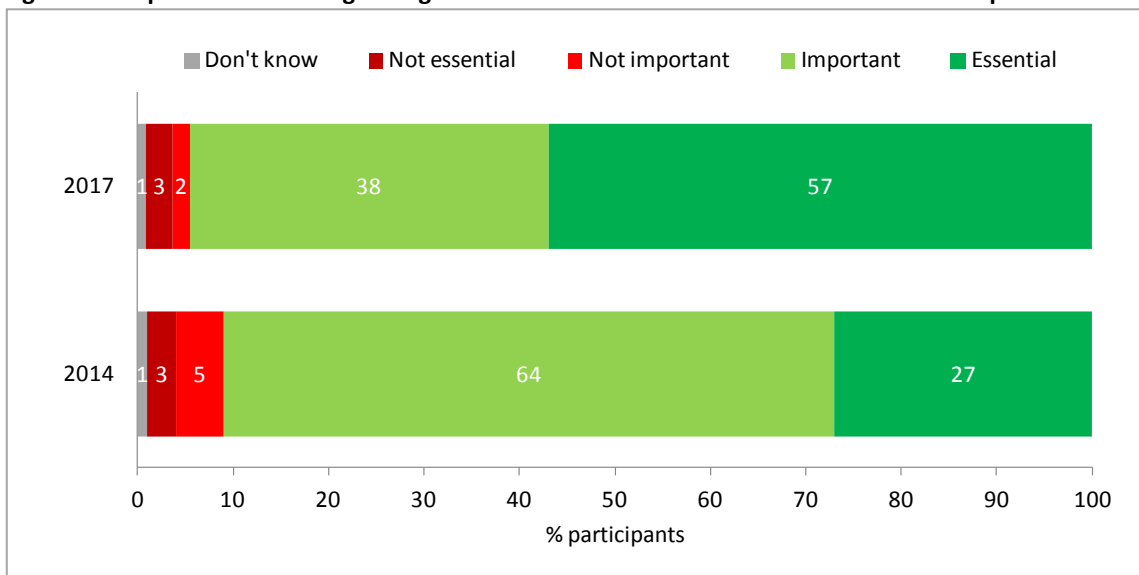
⁶ WATRS is the Water Redress Scheme. It is a free and independent resolution scheme designed to help customers who remain unhappy after their complaint has been through the water company procedure and after they have sought help from CCWater. Its decisions are binding on the water company and for customers it is a cheaper and easier option to pursuing their complaint through the courts.

⁷ CPS here means Consumer Protection Scheme

comments made by secondary and tertiary stakeholders at the start and the end of the survey suggest that an organisation with CCWater’s role has a number of benefits:

- Provides a valuable service representing customers
- Essential part of the regulatory framework
- Independent
- Challenges water companies to prioritise customers
- Acts as a bridge between Ofwat and Customer Challenge Groups
- Provides a balance between large companies and consumers
- Draws attention to issues which are important at a local level.

Figure 11: Importance of having an organisation with CCWater’s role: 2014 and 2017 compared



Base: Primary, Secondary and Tertiary Stakeholders (2017=109); 2014=99)

In 2017, primary stakeholders gave a higher rating than secondary stakeholders, but all three groups gave high ratings:

- **3.83** for primary stakeholders
- **3.41** for secondary and tertiary stakeholders.

Perceptions across the stakeholder groups were fairly consistent, except for representative, professional and industry bodies, and the government whose ratings seemed to be well below the others.

4.3 Perceptions of CCWater's performance

Performance in fulfilling statutory role to represent the interests of consumers

When discussing performance, nearly all primary stakeholders felt the performance had stayed the same (most) or improved. Positive comments to explain ratings centred on improved team structures, stronger partnerships and engagement.

"That's not because it was bad in the first place. It's because they're on a development journey. It's more about experience, building experience, and building relationships, so that's perhaps a bit misleading, unless you can put a caveat in to say it relates to the new team developing their skills and understanding... Yes, yes, and we're helping them to do that, of course. It's about getting them in the business; getting them to understand our DNA"
Primary Stakeholder, Water

"I can think of one particular example I can think is a step forward and I like it, which is taking their Board meetings on the road. That gives me a sense that they're trying to become more outgoing and more transparent, and that feels to me like a step in the right direction."
Primary Stakeholder, Water

Some concerns were noted about the evolution of the sector and how CCWater is reacting to changes/developments such as the opening of the market and the latest price review. Some primary stakeholders felt that there didn't seem to be a development of strategy or innovation/forward thinking – there should be some sense of improvement or evolution.

"I've not seen very much from them about retail competition."
Primary Stakeholder, Water

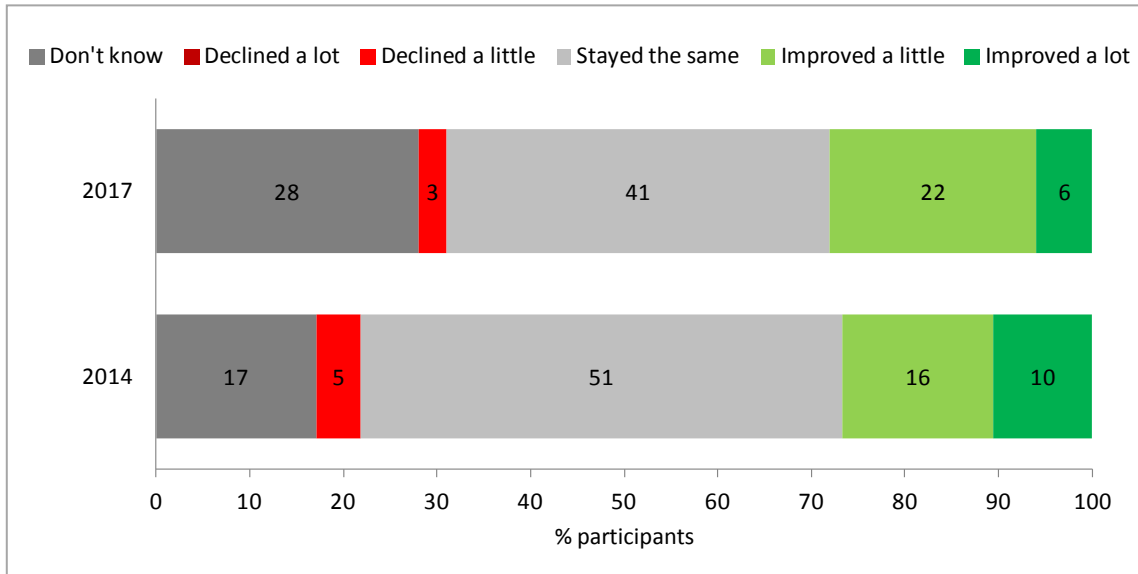
"Well, it's not always obvious. I'm not knocking them but it's not always obvious how much progress they've actually made, let's put it that way."
Primary Stakeholder, Water

"I haven't seen any improvement. I know there's been a bit of restructuring within CCWater but I haven't seen any improvement for any contact with myself... There used to be quarterly CCW meetings; I haven't had any invites to that. When you look at their pages its very light touch on [smaller organisations]... and mainly focuses at incumbent suppliers."
Primary Stakeholder, Water

Participants were asked whether they thought CCWater's performance in fulfilling its statutory role to represent the interests of water consumers had improved, declined or stayed the same over the past two years. A feature of the 2017 survey was that many more were unable to say whether this was the case than in 2014 (see Figure 12). The level of 'don't knows' appears to be higher across all three groups of stakeholders

in 2017 compared with 2014. The levels in 2017 seem to be higher for secondary and tertiary stakeholders (as was the case in 2014).

Figure 12: Perceptions of CCWater’s performance in fulfilling its statutory role to represent the interests of consumers: 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=109; 2014=105)

The proportion of don't know responses in the 2017 survey was far higher than in 2014. The possible reasons for this are set out on page 8 of the methodology chapter. This affects the ability to make like for like comparisons between the two surveys.

By taking out the 'don't know' scores, it is possible to show clearly the change in CCWater's perceived performance by using a mean score rating. In this case a score of 1 means performance has declined a lot and a score of 5 means it has improved a lot. The ratings show that in both 2014 and 2017 stakeholders perceived performance to be reasonably high and some thought that it had improved:

2014 performance: **3.39**

2017 performance: **3.44**

In 2017, there was little difference in the scores given by primary, secondary and tertiary stakeholders.

Among secondary and tertiary stakeholders, in 2017 they were asked to say why they thought CCWater's performance had declined or improved.

There were two primary and secondary stakeholders who thought performance had got worse. One felt CCWater's regional knowledge had been lost following reorganisation and the other because some staff, other organisations and water companies are unaware of their agenda.

As the base for those who thought performance had improved in the last two years comes to 24, the findings cannot be considered robust so percentage data is not

presented, but the frequencies for key reasons are given for information (n.b. multi-code question):

- 8 Better engagement with stakeholders
- 6 Greater visibility – there is more awareness of CCWater
- 5 Better communication
- 5 More collaborative
- 5 Better quality information
- 4 More strategic/more forward thinking
- 4 More active/effective.

CCWater's performance conducting specific functions

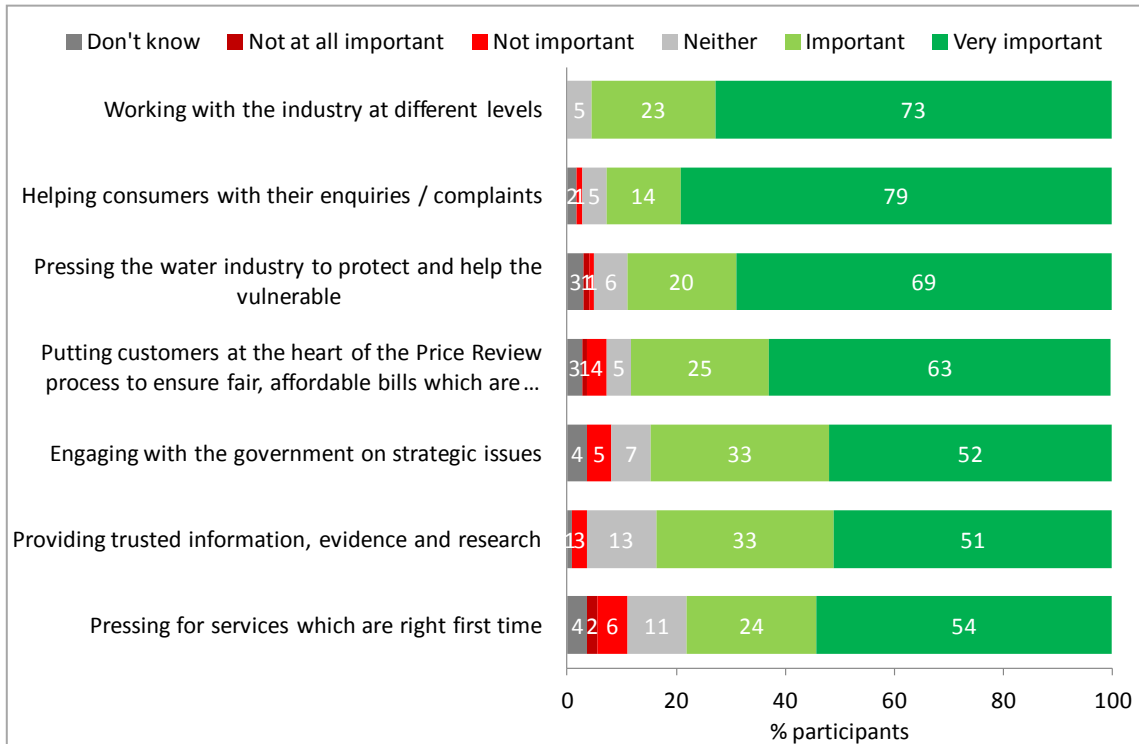
Stakeholders were asked to assess how important specific functions are for the role of the consumer representative and to rate CCWater's performance in undertaking those functions. The areas assessed were:

- Providing trusted information evidence and research
- 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 to ensure fair, affordable bills which are value for money
- Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services
- Working collaboratively with the industry at national levels and company level and with stakeholders
- Engaging with the Government on strategic issues.

Importance of specific functions for the consumer representative

As Figure 13 shows, the overwhelming majority of stakeholders perceived each function as being 'important' or 'very important' for CCWater in its role as a consumer representative.

Figure 13: Importance of specific functions for the role of consumer representative 2017



Base: Primary, Secondary and Tertiary Stakeholders (109-110)

Figure 13 ranks the various functions from most to least important by combining the 'important' and 'very important' scores. By this rating, the least important function was perceived to be 'Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services'. Even in this case, however, a very large majority of participants, 78%, still thought it was important or very important in CCWater's role as a consumer representative.

The ranking of perceived importance of the different functions fall into three groups when the 'important' and 'very important' scores are added together as shown below.

Over 90%: 95% Working collaboratively with the industry at national levels and company level and with stakeholders

93% Helping consumers with their enquiries and to resolve issues and complaints

80% to 89%: 89% Pressing the water industry to protect and help vulnerable customers

88% Putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money

85% Engaging with the government on strategic issues

84% Providing trusted information, evidence and research

Below 80%: 78% Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services.

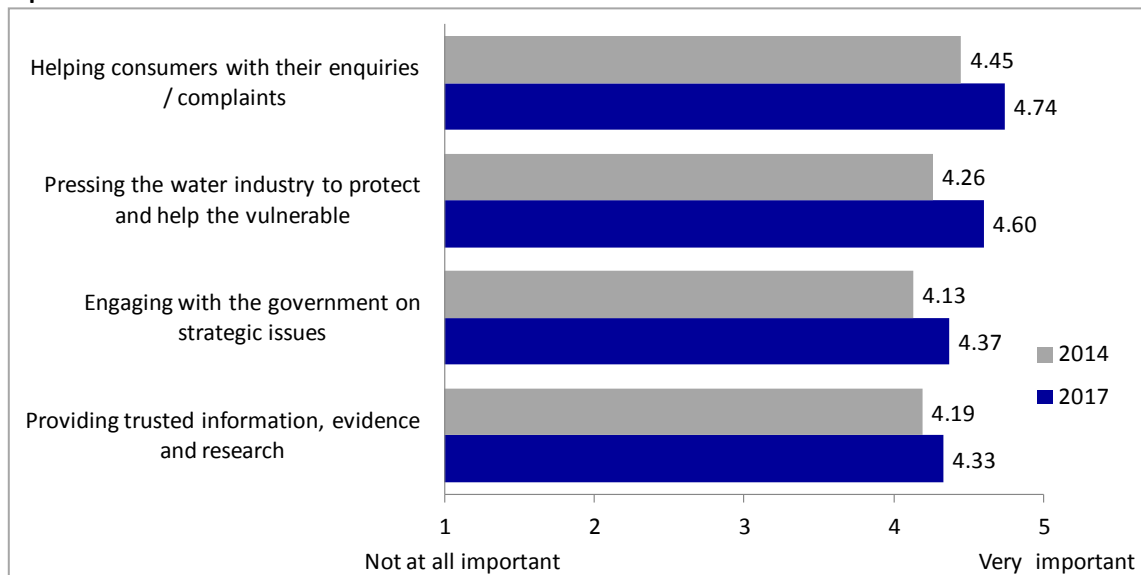
Changes in the importance of specific functions of the consumer representative

The perceived importance of each function appears to be higher in 2017 than in 2014.

However, in showing the changes in stakeholder perceptions the report has to take account of changes in some of the measures used to rate performance in 2017 compared with 2014. These changes were made to streamline the survey because some of the measures were very similar and had overlapping outcomes in 2014.

In four cases the measures used did not change and these are shown in Figure 14.

Figure 14: Change in importance of CCWater performing specific functions in its role as a consumer representative: 2014 to 2017

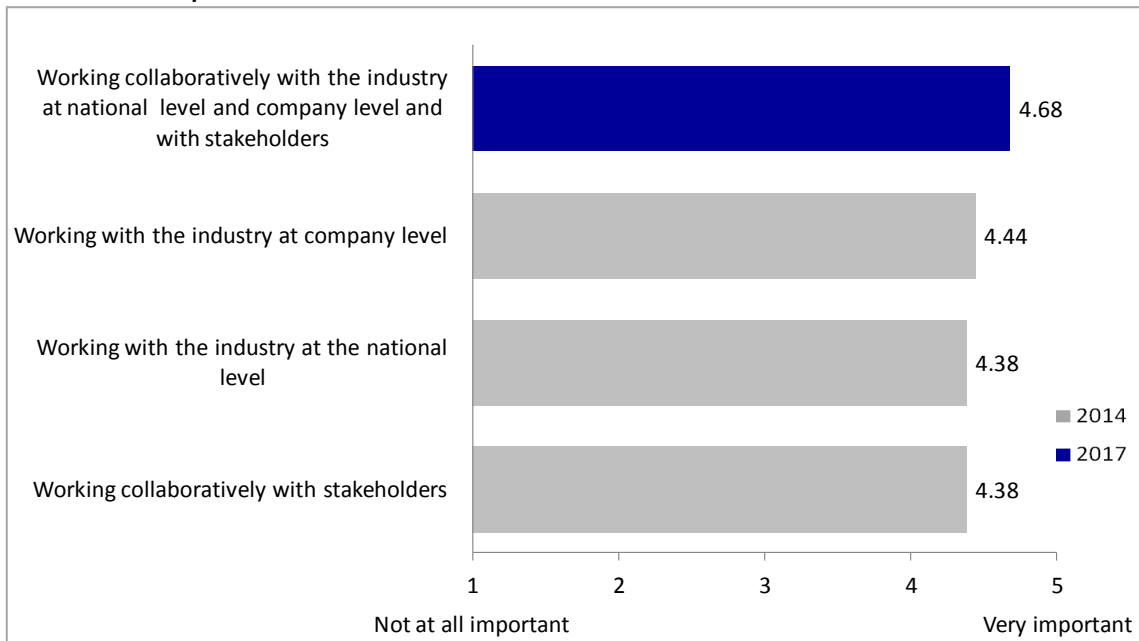


Base: Primary, Secondary and Tertiary Stakeholders (2017=106-109; 2014=101-102)

For the remaining three functions, the measures were revised in 2017 and comparisons between 2014 and 2017 data should take this into account.

The measure 'working collaboratively with the industry at national levels and company level and with stakeholders', replaced three separate measures as shown in Figure 15.

Figure 15: Change in importance of CCWater working with other actors in the water industry in its role as a consumer representative: 2014 to 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=110; 2014=99-103)

The measure ‘pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services’, replaced two separate measures (see Figure 16).

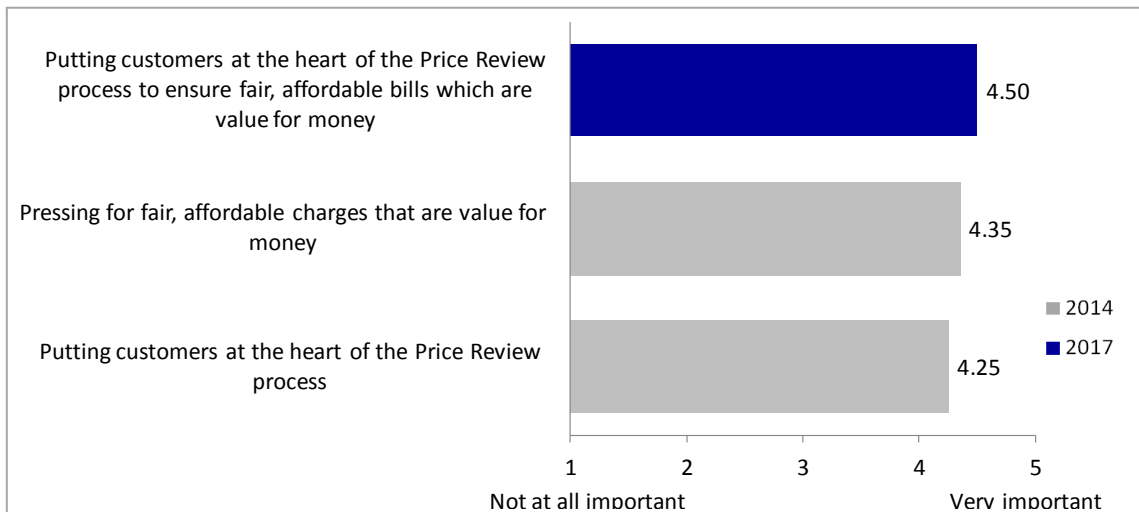
Figure 16: Change in importance of CCWater pressing for safe, reliable and sustainable service sin its role as a consumer representative: 2014 to 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=105; 2014=100-104)

The measure ‘putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money’, replaced two separate measures (see Figure 17).

Figure 17: Change in importance of putting customers at the heart of the Price Review process to ensure fair affordable bills which are value for money in its role as a consumer representative: 2014 to 2017

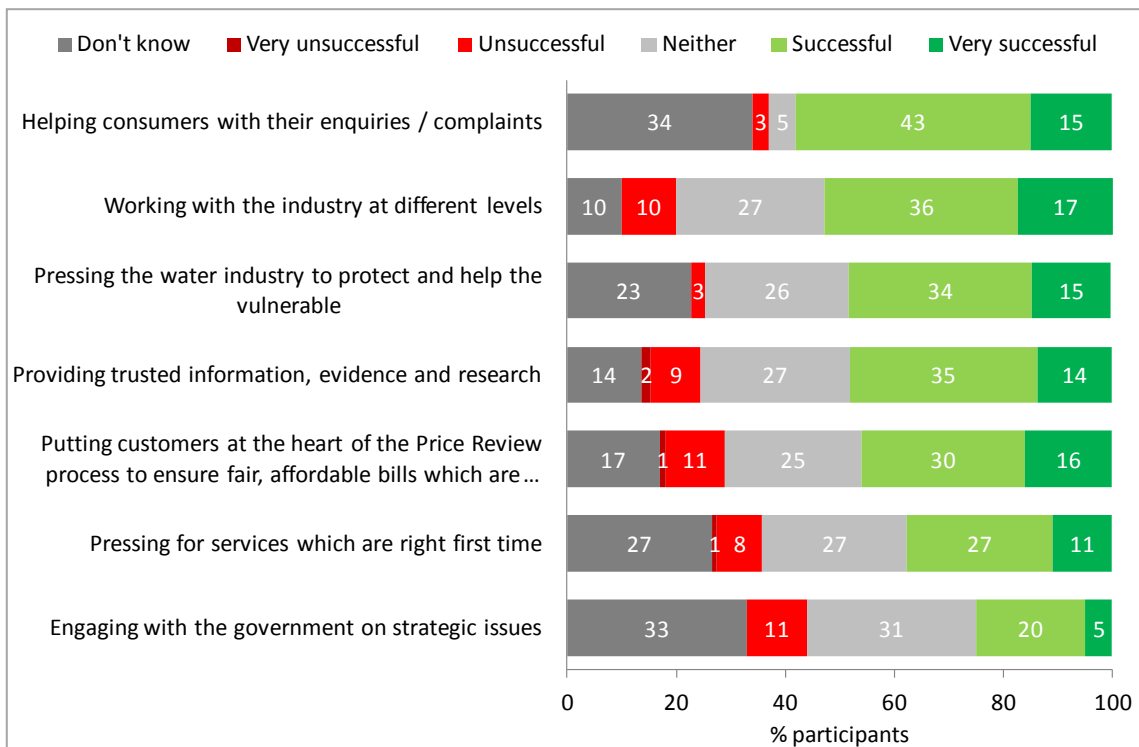


Base: Primary, Secondary and Tertiary Stakeholders (2017=107; 2014=97-100)

Success of CCWater in carrying out specific functions in as consumer representative

This is another area in the research where more participants in 2017 than 2014 were unable to comment on CCWater’s performance as shown in Figure 18. As previously noted on page 28, in most cases the ‘don’t know’ responses were higher for all three groups of stakeholders in 2017 than in 2014. In 2017, the proportion giving a ‘don’t know’ response was generally higher for secondary and tertiary stakeholders than for primary stakeholders (as was also the case in 2014).

Figure 18: CCWater’s success in performing specific functions in its role as a consumer representative 2017



Base: Primary, Secondary and Tertiary Stakeholders (109-110)

By using mean scores, which as previously explained, corrects for the distortion caused by the high proportion of don't know responses, it is easier to see the ranking of how stakeholders perceived CCWater's success in carrying out its functions. These are measured on a 1 to 5 scale where 1 is 'very unsuccessful' and 5 is 'very successful'.

- 4.07** Helping consumers with their enquiries and to resolve issues and complaints
- 3.78** Pressing the water industry to protect and help vulnerable customers
- 3.67** Working collaboratively with the industry at national level and company level and with stakeholders
- 3.60** Putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money
- 3.57** Providing trusted information evidence and research
- 3.53** Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services

3.30 Engaging with the Government on strategic issues.

On this mean score measure the main findings are mixed:

There was one area where CCWater was seen to be clearly successful (i.e. scoring above 4). This was in ‘helping consumers with their enquiries and to resolve issues and complaints’ which was scored at 4.07.

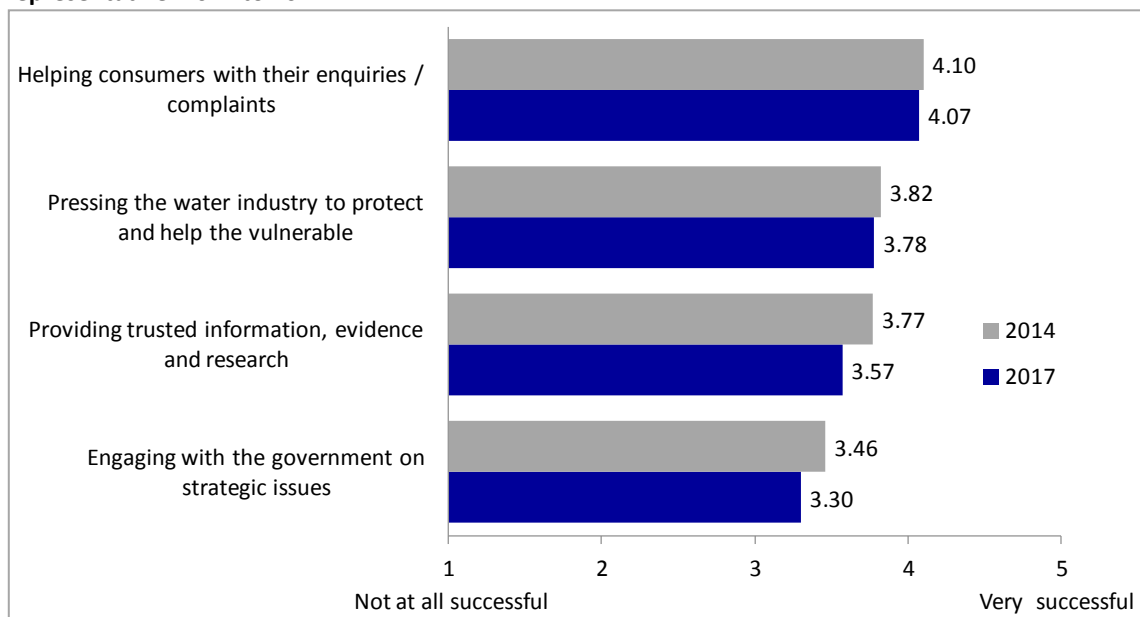
All of the remaining scores were between 3 and 4 indicating that stakeholders were more neutral over CCWater’s performance and there is room for CCWater to improve perceptions of its performance in these areas. There was no consistent pattern to the differences in success scores across the different segments (primary, secondary, tertiary).

Changes in CCWater’s success in carrying out specific functions

In all cases stakeholders appeared to rate CCWater’s success in carrying out its functions slightly lower in 2017 than 2014.

As stated on page 28, the analysis of how CCWater’s success in carrying out its functions have to take into account changes in the questions used to measure success have changed between 2014 and 2017. Figure 19 shows the scores for measures of success for the questions that were the same in 2014 and 2017.

Figure 19: Change in CCWater’s success in performing specific functions in its role as a consumer representative: 2014 to 2017

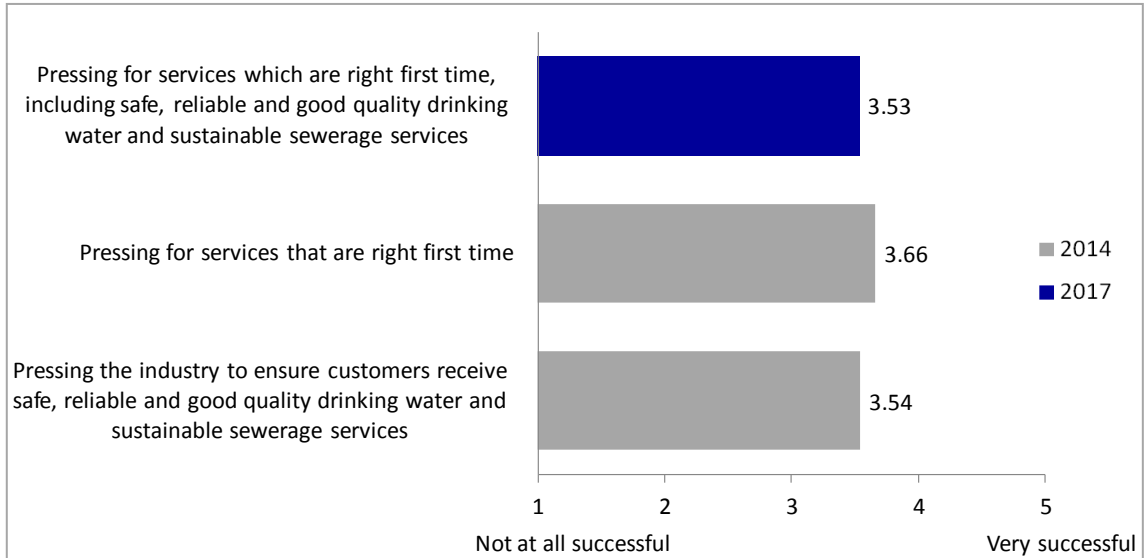


Base: Primary, Secondary and Tertiary Stakeholders (2017=73-95; 2014=100-105)

The three other measures changed between 2014 and 2017, so comparisons are made with care.

Figure 20 shows the fall in CCWater’s success in pressing for services which are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services. This replaced two separate measures used in 2014.

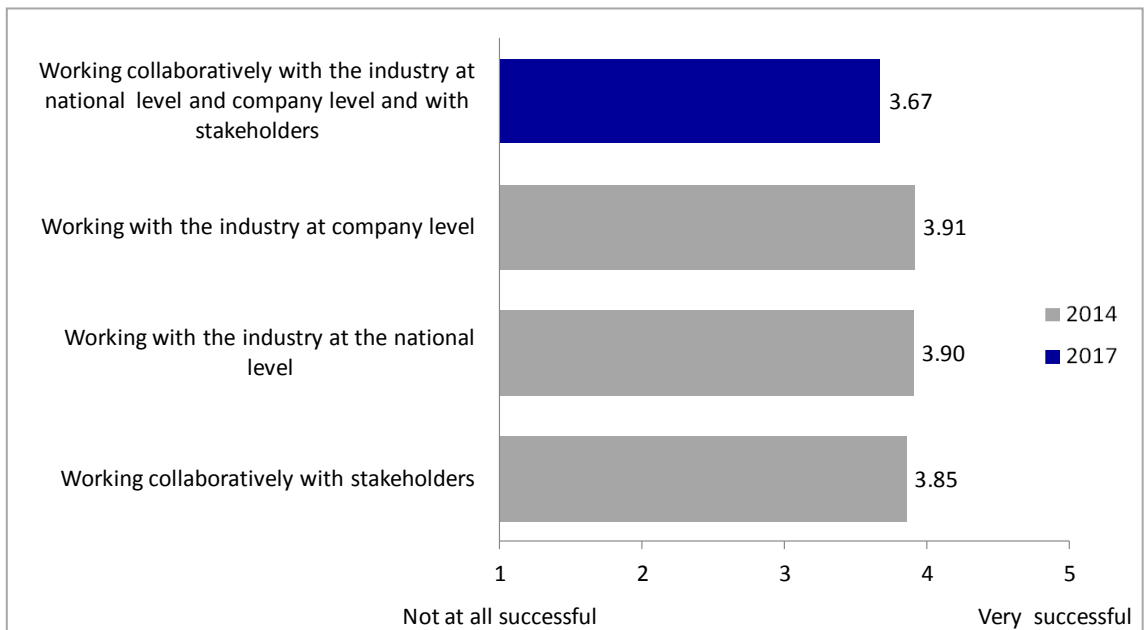
Figure 20: Change in CCWater’s success in pressing for services which are right first time, including safe, reliable and sustainable sewerage services: 2014 to 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=80; 2014=104-105)

Figure 21 shows how CCWater’s success in working with other actors changed. The single 2017 indicators replaced three used in 2014. This score appears to have fallen more than almost all other areas.

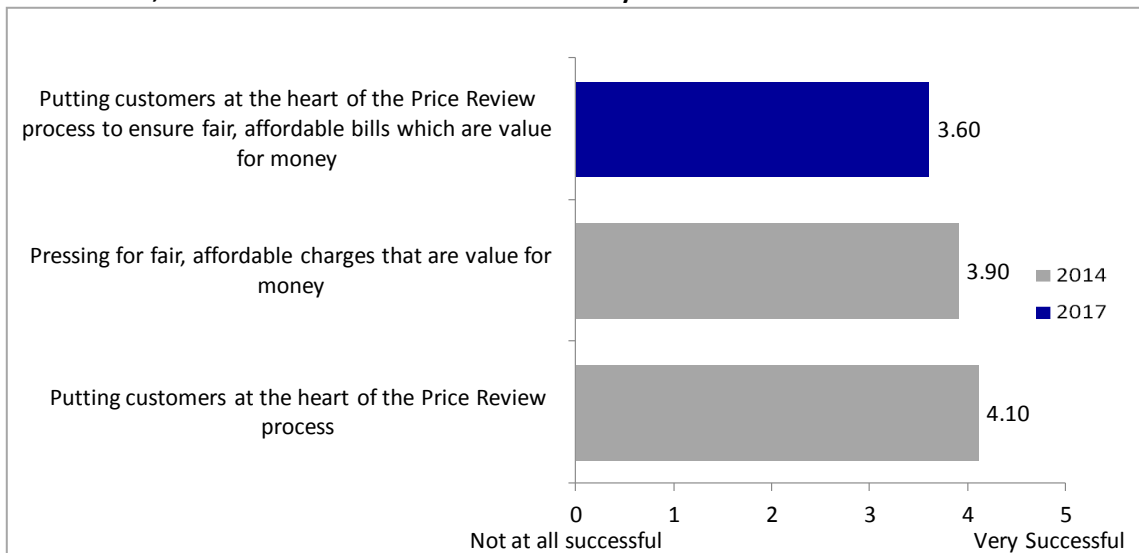
Figure 21: Change in CCWater’s success in working with other actors in the water industry: 2014 to 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=99; 2014=105)

Figure 22 shows perceived success in putting customers at the heart of the price review process to ensure fair, affordable bills which are value for money. The single 2017 measure replaced two separate indicators used in 2014. This score shows the biggest fall among all of the measures of success. It should be noted, however, that the 2014 research was conducted just as the 2014 Price Review was concluding and the 2017 survey is between price reviews. So CCWater’s activities in this area will increase and the organisation will become more visible in response to the 2019 Price Review process.

Figure 22: Change in CCWater’s success in putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money



Base: Primary, Secondary and Tertiary Stakeholders (2017=91; 2014=105)

4.4 Key driver analysis: comparing importance of work vs. perceived performance

Primary Stakeholder views

When discussing importance and success of various elements, generally, primary stakeholders rated the importance more strongly than success. A number of issues were raised through the conversations surrounding the remit of CCWater which was perceived as duplicating or encroaching on other agencies such as the Drinking Water Inspectorate or the Environment Agency; most notably mentioned when discussing the importance of ‘Pressing for services that are right first time including safe reliable and good quality drinking water and sustainable sewerage services’. With both these organisations, CCWater has a memorandum of understanding and is involved to support customers concerning complaints in related areas. It is possible there is a lack of clarity over CCWater’s involvement.

This question of remit was discussed more broadly by some primary stakeholders who felt CCWater should examine their role and consider the following:

- Focus on core elements – don't duplicate work of other agencies
- Be aware of other agencies encroaching on their remit
- Consider new developments in the market – push boundaries
- Provide a stronger voice/build influence.

Putting consumers at the heart of the Price Review process:

"...is there anything about them that makes them successful that is different from the other organisations that are successful in putting consumers at the heart of the Price Review process?" "I don't know, is the straightforward answer to that. The thing is, you've got lots of people all operating on [sic read: in] the same space, the same square of the board, as it were, so it's difficult to know who you should attribute that to. You could say, 'Well, water companies are doing it.' Then you'd say, 'Well, how come water companies are doing it? It's only because of the fact of years of pressure from regulators,' or it could be that there are people in water companies who believe in customer service, like I do, and some would say, 'We don't need anyone to tell us to do it.' I think that's a naïve position and we [sic read: there] should always be checks and balances on any system and CCW are an important part of that checking balance."

Primary Stakeholder, Water

To be collaborative in the industry:

"I think they have this issue that they - there is a degree of institutional overlap between them and what Ofwat do and it's difficult to discern and the power lies with Ofwat because they are the people who set prices. If CCW are there in terms of influencing and those things, then it's more difficult to attribute success to someone who has influence as opposed to someone who's said, 'Well, I've cut the prices.'"

Primary Stakeholder, Water

Pressing for services that are right first, including safe, reliable and good-quality drinking water:

"No. That is the job of the Drinking Water Inspectorate. That's what I call a prime example of regulatory creep.... we are obliged, if we have any problems, to notify the inspectorate immediately, regardless of whether anybody has become [sic read: ill]... If it's a water quality incident, long before it actually reaches down stream to the consumers the Drinking Water Inspectorate is aware of it and we're required to do that. I don't think we want CCW involved as well."

Primary Stakeholder, Water

"Because I don't think of CCW in relation to those services, and they are not as influential to my thinking and my policy development as Ofwat and the Drinking Water Inspectorate are in the EA. So yes, that's my response to that."

Primary Stakeholder, Water

“I think that's more a matter for the Drinking Water Inspectorate.... It needs to be on their radar, clearly, but I don't think they're the body that should be banging the drum about that.”

Primary Stakeholder, Water

Pressing the water industry to protect and help vulnerable customers:

“I think the perceived challenge for me is that perhaps the economic regulator, Ofwat, has grasped the vulnerability agenda for customers a bit more visibly than CCW has and, instinctively, it feels to me an agenda that should be owned and led by CCW rather than Ofwat, and I'm not perceiving that's how it is It feels to me that Ofwat is picking up the lead on this a bit more than I'd expect them to, when it feels to me that it should be natural CCWater lead territory.”

Primary Stakeholder, Water

To engage with the government on strategic issues:

“Only a sense, and it's not a specific thing, but only a sense that their voice of influence is not that strong when compared to other regulatory voices, but that's in perception again.”

Primary Stakeholder, Water

One other point to mention was a degree of sensitivity from a few primary stakeholders to the word ‘pressing’ which was used in two of the elements discussed. This jarred slightly as it was felt that there was no requirement to ‘press’ as this was already core to their thinking.

The above analysis shows that stakeholders seem to see CCWater’s role as being increasingly important in all areas, but that its perceived success in carrying out all of those roles seems to have fallen. As all areas are affected, clear guidance is needed on where it is most important for CCWater to improve performance.

A clearer way to see where CCWater should act is to take into account both the importance and success measures simultaneously as a means of prioritising service improvement. This works by creating a combined average importance rating from all seven of the individual importance scores and a combined success rating from all seven of the individual success measures. Performance of each of the seven functions is then judged in relation to these two means. This works as follows:

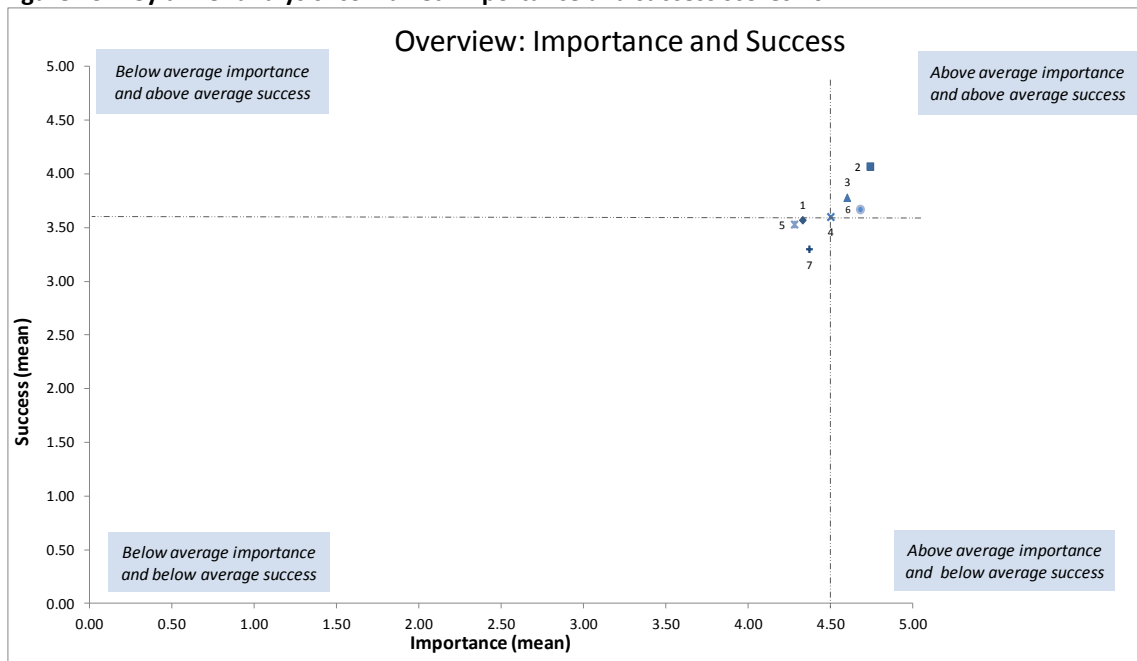
The two mean scores are plotted as vertical and horizontal lines on a graph. This produces four quadrants which are used to rank where action may be needed to improve performance in the seven functions considered in the consultation. The individual functions are then plotted on this graph according to their importance and success scores and their positioning in each of the four quadrants are used to show how much of a priority they should be for improvement. The four quadrants determine the importance of taking action as follows:

- **Above average** importance and **Below average** success
 - Top priority to improve overall performance scores

- **Above average** importance and **above average** success
 - Second priority for improvement as an increase in success in pursuing these functions could improve overall performance scores
- **Below average** importance and **below average** success
 - Third priority for service improvement given the lower importance to stakeholders
- **Below average** importance and **above average** success
 - Lowest priority for improvement given its lower importance to stakeholders, but performance is seen as being better than in the third priority area.

CCWater’s importance and success rating are all relatively high, so performance is judged against high average importance and scores as Figure 23 shows. As it is hard to show the priorities for improvement using a standard graph, the relevant section of Figure 23 is enlarged in Figure 24.

Figure 23: Key driver analysis: combined importance and success scores 2017

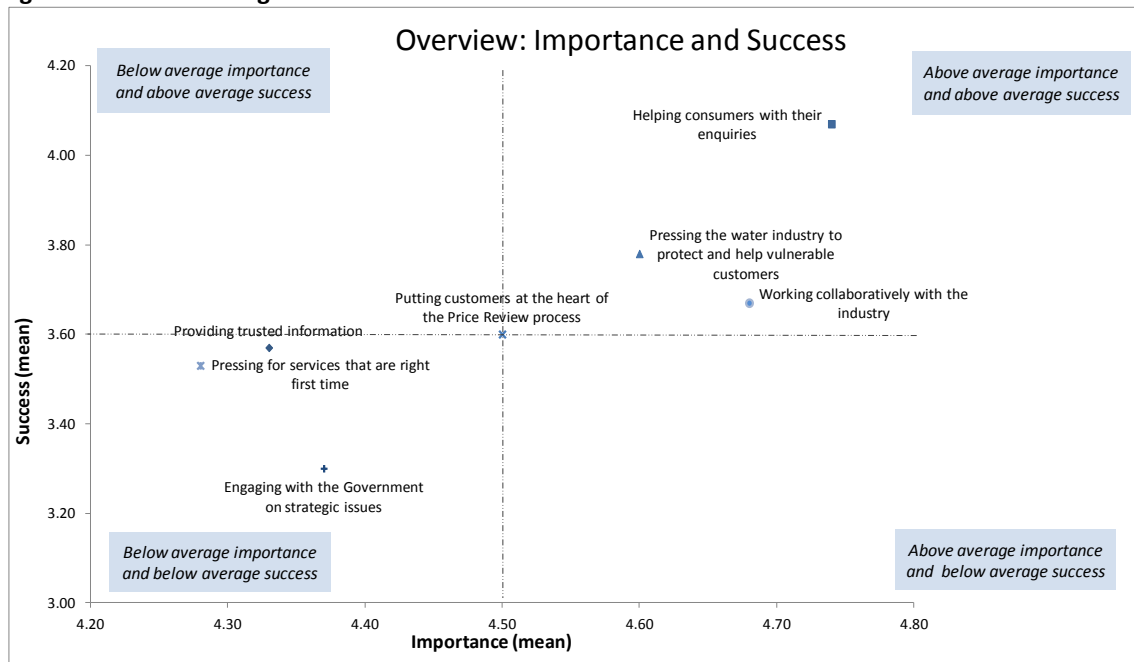


Base: Primary, Secondary and Tertiary Stakeholders (109-110)

Key:

1	Providing trusted information
2	Helping consumers with their enquiries
3	Pressing the water industry to protect and help vulnerable customers
4	Putting customers at the heart of the Price Review process
5	Pressing for services that are right first time
6	Working collaboratively with the industry
7	Engaging with the Government on strategic issues

Figure 24: Key driver analysis: combined importance and success scores 2017 (enlarged view of top right hand section of Figure 23)



Base: Primary, Secondary and Tertiary Stakeholders (109-110)

This shows that none of CCWater’s roles fall within the key ‘above average importance and below average success’ area. Four are in the second tier ‘above average importance and above average success’ area. The remaining three are in the third tier ‘below average importance and below average success’ area. None fall in the fourth tier ‘below average importance and above average success’ area. These are:

- **Above average importance, below average success:**
 - None

- **Above average importance, above average success:**
 - Helping consumers with their enquiries and to resolve issues and complaints
 - Pressing the water industry to protect and help vulnerable customers
 - Working collaboratively with the industry at national level and company level and with stakeholders
 - Putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money

- **Below average importance, below average success:**
 - Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services
 - Providing trusted information evidence and research
 - Engaging with the Government on strategic issues

- **Below average importance, above average success:**
 - None.

These findings indicate that, in the absence of any functions falling within the top priority area for improvement, CCWater should initially seek to improve its performance of the functions in the second tier before seeking improvements in functions falling within the third tier.

So CCWater may wish to focus attention initially on:

- Helping consumers with their enquiries and to resolve issues and complaints
- Pressing the water industry to protect and help vulnerable customers
- Working collaboratively with the industry at national levels and company level and with stakeholders
- Putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money.

Then it should seek to improve performance in the following functions:

- Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services
- Providing trusted information evidence and research
- Engaging with the Government on strategic issues.

4.5 Attributes about CCWater

Another way in which perceptions of CCWater were reviewed was by asking stakeholders how well specific functional attributes described CCWater. These were:

- Efficient
- Its policies are based on evidence
- Independent
- Good at information sharing
- Providing clear and relevant information on consumer issues
- Authoritative
- Respected by the industry
- It is a trustworthy sources of information

The area which rated lowest for primary stakeholders was 'good at information sharing'. Comments around this centred on a number dimensions from individuals such as:

- Not proactive/not enough
- Selective?
- Source? Out of date?
- Too much?
- More dissemination?

"Well, I actually think you only get to hear about the things they want to tell you, you don't see it in the raw. I mean that's just a personal opinion...Well, I think it is a problem related to all bodies associated with civil service in one way

or the other. I think it's the very nature of the way in which the civil service operates actually, it releases selected information and I think any statutory body unfortunately inherits that method of operating."

Primary Stakeholder, Water

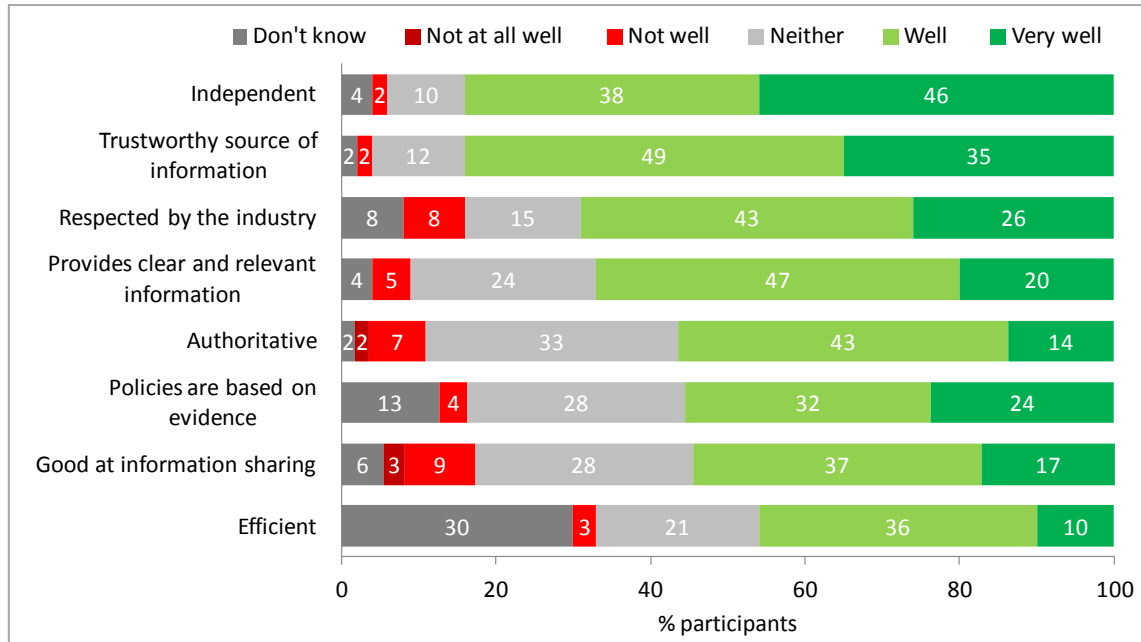
Another notable area where comments were made by primary stakeholders surrounded 'providing clear and relevant information on consumer issues'. One participant felt it was difficult to see the message whilst another felt CCWater could do more 'lessons learnt' sessions (i.e. where there are issues, share within the industry).

"...they could probably do more where there are issues...lessons learnt, pass them around the industry."

Primary Stakeholder, Water

Figure 25 shows the breakdown of the 2017 findings by how well participants perceived the attributes to describe CCWater. They are ranked highest to lowest based on combining 'well' and 'very well' scores. In some instances the rankings are affected by the relatively high proportions of participants who did not know the answer. Unlike other questions, the levels of 'don't knows' appear similar to what was found in the 2014 survey and, again, there appears to be fewer who did not know answers among primary stakeholders than among secondary or tertiary stakeholders.

Figure 25: Perceptions of CCWater on functional attributes 2017



Base: Primary, Secondary and Tertiary Stakeholders (110)

As explained on page 28, the high proportion of 'don't knows' in some questions affects comparisons of scores between the different functions. This has been addressed, once again, by using mean scores which exclude 'don't know' responses. The scores below show how well the eight attributes describe CCWater, using a scale of 1 to 5 where 1 is 'not at all well' and 5 is 'very well'. The following list ranks the functions from highest to lowest mean score:

- **4.34** Independent
- **4.20** It is a trustworthy source of information
- **3.95** Respected by the industry
- **3.87** Its policies are based on evidence
- **3.85** Providing clear and relevant information on consumer issues
- **3.77** Efficient
- **3.61** Good at information sharing
- **3.60** Authoritative

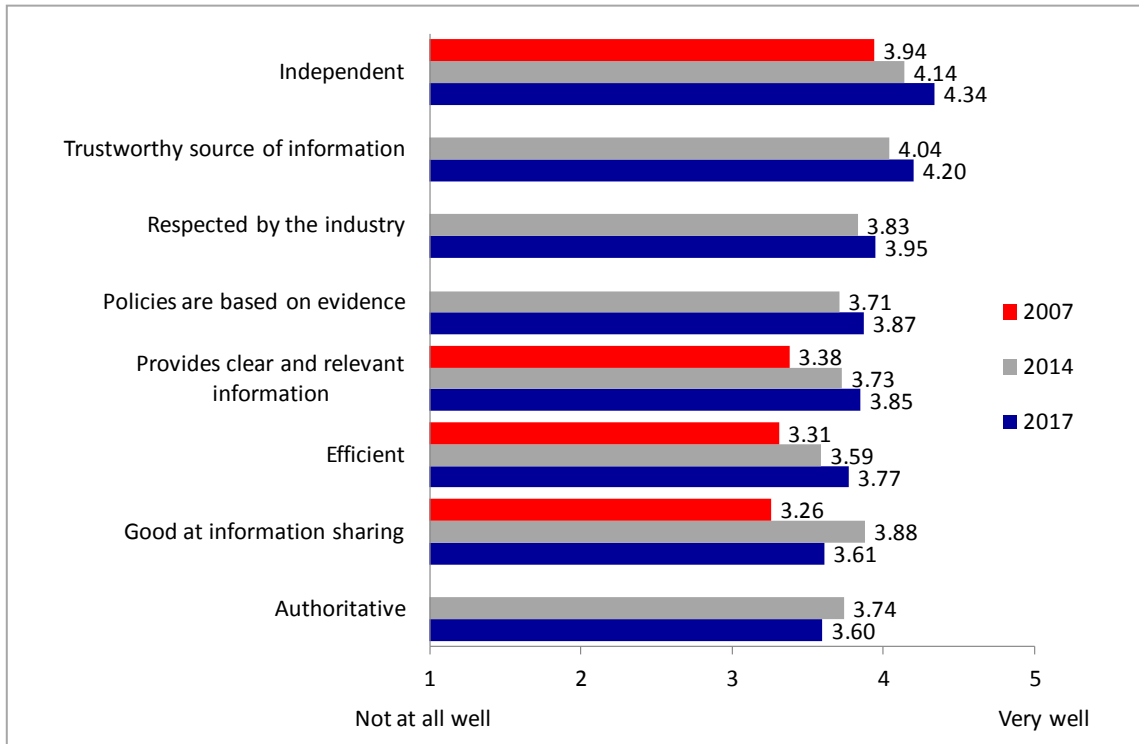
This shows that:

- 'Independent' and 'trustworthy source of information' are the highest scores at over 4 (i.e. describes CCWater 'well').
- The remainder all fall within the range of 3.60 to 3.95, indicating there is room for improvement.

Across the segments secondary and tertiary stakeholder seemed to give slightly higher ratings on most of the indicators.

The time series data for the means scores shows that, apart from two instances, most of the attributes appear to describe CCWater better now than they did in the past (see Figure 26).

Figure 26: Change in perceptions of CCWater on functional attributes 2007, 2014, 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=77-108; 2014=81-101; 2007=93-95)

There seems to have been a slight drop in the scores awarded for CCWater being ‘authoritative’ and being ‘good at information sharing’.

- Authoritative:
 - 2014 **3.74**
 - 2017 **3.60**

- Good at information sharing:
 - 2014 **3.88**
 - 2017 **3.61**

As these two areas appear to be the lowest scoring in 2017 and seem to have declined since 2014, these should be the priority areas for CCWater to address in seeking to enhance stakeholder perceptions about its functions.

5. COMMUNICATION

5.1 Chapter summary

How informed are stakeholders? Stakeholders felt less informed about CCWater in 2017 than they did in 2014 (3.66 out of 5 vs 3.96 out of 5) Primary stakeholders felt better informed in 2017 than secondary and tertiary stakeholders (3.92 out of 5 vs 3.59 out of 5). As stated previously, this may reflect the early stage CCWater is at in its relationship with its expanded range of stakeholders.

Amount of information received: About a third (34%) thought they received too little information from CCWater, up slightly from 29% in 2014. However, overall 65% feel they have about the right amount of communications. Stakeholders suggested CCWater should be more visible in general, having more events, focusing on providing more relevant information, and sharing more information.

Preferred means of communication: Face to face, email, telephone and stakeholder events are the most preferred means of communication, with preference for face-to-face and telephone contact rising since 2014. Stakeholders seemed more likely in 2017 to take notice of all forms of communication methods than in 2014. In 2017 stakeholders would take most notice of update emails (75%) and publications such as research reports (71%), and least notice of social media updates (35%).

CCWater's website: Stakeholders gave positive ratings for the website, including relevance of content and information, ease of use and look and feel.

On Tap: Awareness of the "On Tap" E-Bulletin appears to have fallen in 2017, but this finding should be treated with caution due to the small base of stakeholders who answered this question.

Forward Work Programme: More stakeholders appeared to be aware of the Forward Work Programme in 2017 than in 2014 (69% vs 59%).

Awareness of projects and activities: Fewer were unaware of any CCWater projects and activities in 2017 than in 2014. 34% could not spontaneously name any in 2017, compared with 68% in 2014. The highest level of awareness was of CCWater's promotion of support and assistance for consumers struggling to afford their water bills (85%). The lowest was promoting the benefits of tap water (34%).

Awareness of recently published reports: The proportion unaware of recently published CCWater reports also appears to be lower (spontaneously unaware in 2017 45% vs 69% in 2014). The change may be due in part to the question on awareness of reports being changed in 2017 to allow stakeholders to register awareness by subject matter rather than solely by name. The best known reports were water company performance data (84%) and non-household views on competition (78%). The lowest levels of awareness were attitudes to tap water and using water wisely (27%).

Overall communications: Primary stakeholders rated CCWater's overall communications reasonably highly. Positive comments included: references to their relationships; relationships with regional teams; and strength of sector knowledge. A few raised some concerns including: wanting to see more engagement with their particular organisation/wider stakeholders, particularly in relation to the opening of the market; not working in 'silos'; care not to duplicate effort; and level of influence.

Primary stakeholders also thought it was important to strike a balance between maintaining independence whilst working constructively and collaboratively with stakeholders.

Primary stakeholders thought that CCWater could make the best of its current relationships through communications, reviewing the remit of CCWater and being mindful of changes in the sector.

In the quantitative survey all stakeholders were fairly neutral about CCWater's communications, with the exception of the highest rated aspect "CCWater's communication is targeted at the right person within my organisation" (4.11 out of 5). Between 2014 and 2017, scores remained stable, except 'the communications channels used by CCWater are effective' and 'CCWater has a good understanding of my organisation and our aims' where ratings appear to have fallen the most. These should be the priority for CCWater to address.

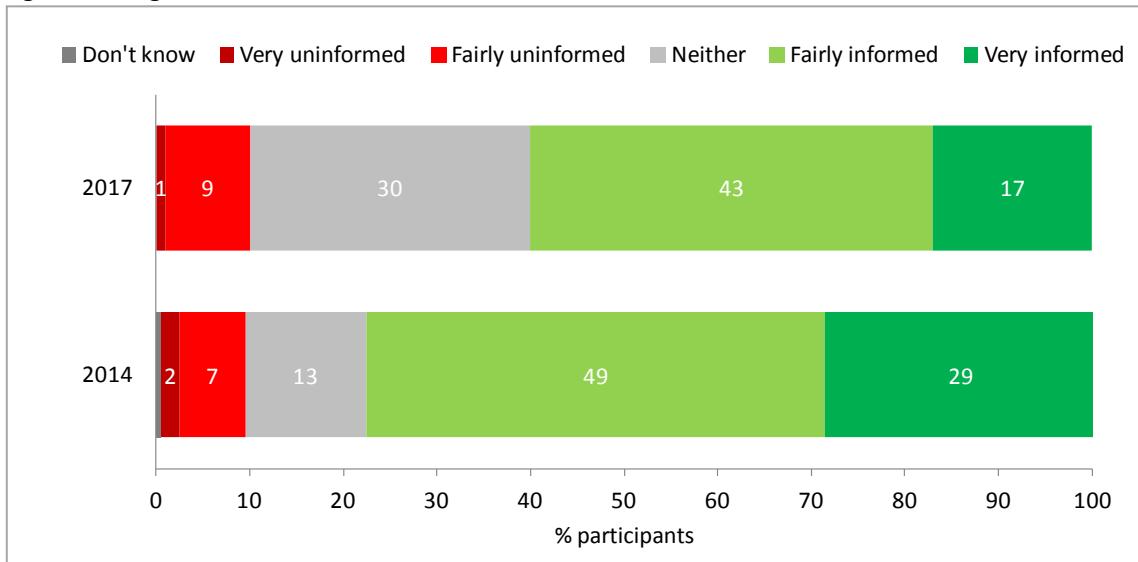
5.2 Receipt of information

How well informed stakeholders feel

Stakeholders were asked to rate how well informed they feel about CCWater overall. This was done using a scale of 1 to 5 where 1 means 'very uninformed' and 5 means 'very informed'.

In the 2017 survey, the majority of stakeholders (60%) felt informed about CCWater overall as Figure 27 shows.

Figure 27: Degree to which stakeholders feel informed about CCWater overall: 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=110; 2014=105)

Stakeholders felt less informed about CCWater overall in 2017 compared with 2014:

2014: **3.96**

2017: **3.66**

This was driven by a rise in those feeling neutral about how well informed they feel.

Primary stakeholders appear better informed than secondary and tertiary stakeholders in 2017 (3.92 versus 3.59).

More secondary and tertiary stakeholders than primary stakeholders appear to feel neutral about how informed they are in 2017.

Amount of information received

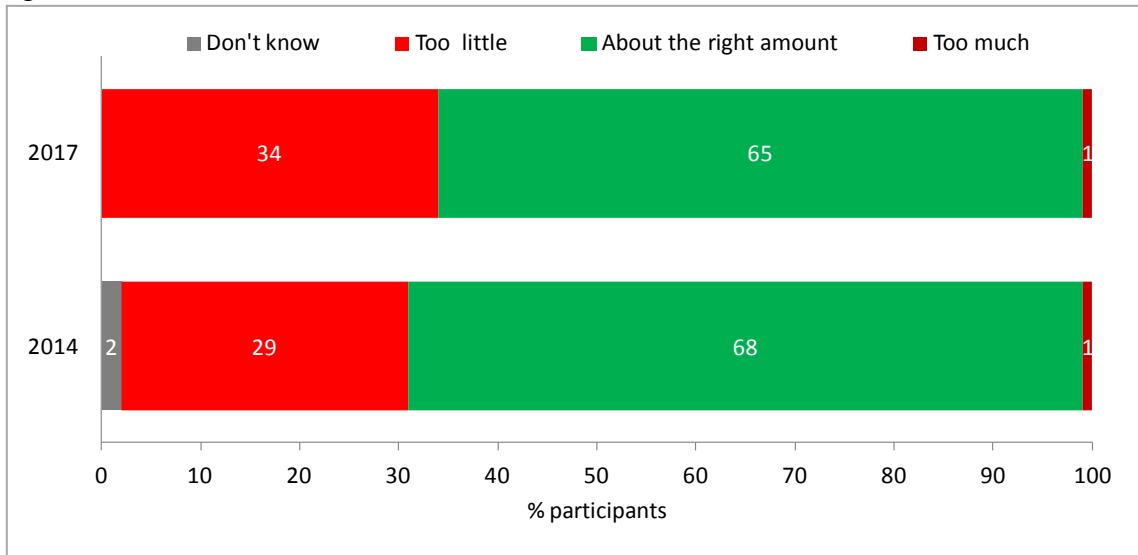
In the 2017 survey, most (65%) felt they received the right amount of information from CCWater, with only 1% believing they received too much. Just over a third (34%) perceived that they received too little.

More primary stakeholders thought they received the right amount of information (79%), compared with secondary and tertiary (61%).

Much fewer than average in the consumer and charity group and in the water segment seemed to believe they received too little information.

Compared with 2014, slightly more stakeholders in 2017 appeared to perceive that they received too little information, up from 29% to 34% (see Figure 28).

Figure 28: Amount of information received from CCWater: 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=109; 2014=104)

These findings suggest that CCWater should consider providing more information to secondary and tertiary stakeholders.

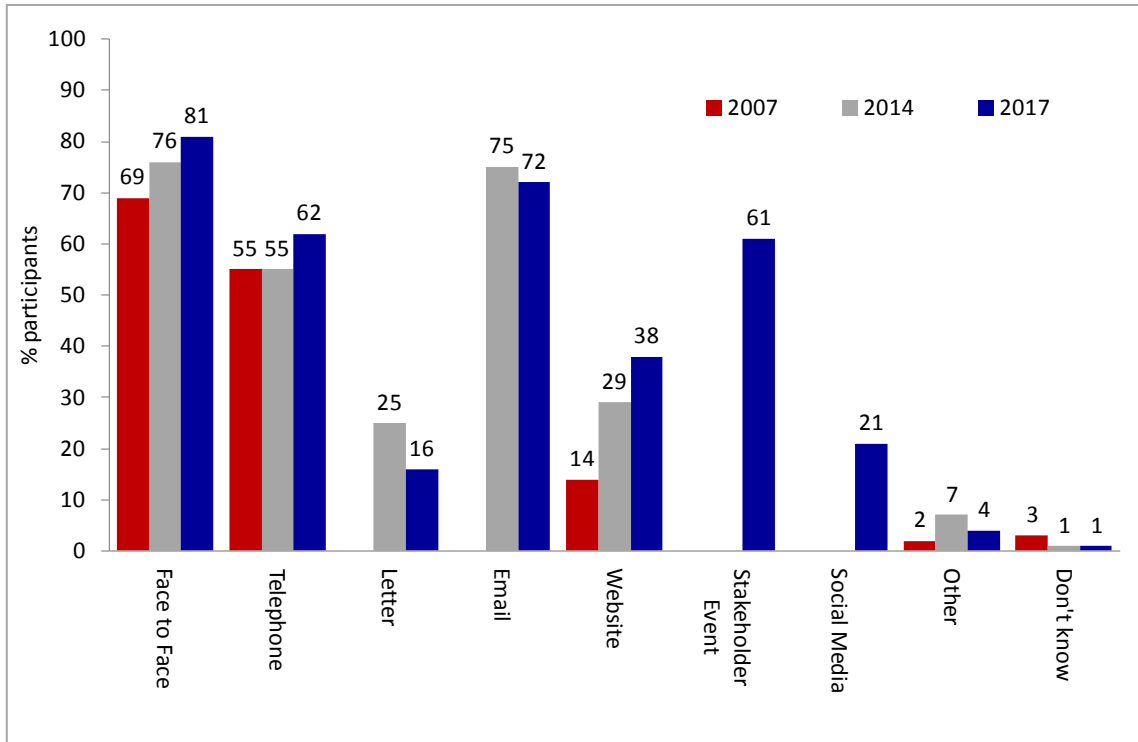
General comments made at the end of the survey by a small number of secondary and tertiary stakeholders suggest that:

- More visibility is needed in general
- Much of CCWater's work is unsung and needs to be publicised
- More events would be welcomed, preceded by asking stakeholders what topics should be covered in them
- The relevance of information sent regularly by email should be improved
- More proactive sharing of research findings would be welcomed
- Biannual stakeholder events should be held to help shape CCWater's Forward Work Programme.

5.3 Communication channels

Figure 29 shows the different modes of communication stakeholders prefer to use to engage with CCWater and how this has changed over the three waves of the research.

Figure 29: Preferred means of communicating with CCWater 2007, 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=109; 2014=92; 2007=100)

The key findings are:

- Face to face, email, telephone and stakeholder events are preferred much more than letter, website and social media.
- Letters and social media are the least preferred methods, some way behind the other mechanisms.⁸
- The preference for telephone and website communication has been increasing.

There was no consistent pattern of preference across the other stakeholder segments:

- Government and regulatory seemed to prefer **face-to-face** contact more than average.
- The consumer and charity group and business customer group seemed much more in favour of **email** than average.

⁸ This finding may reflect the fact that CCWater’s social media activity is aimed mainly at consumers rather than stakeholders.

With the exception of social media, the majority of stakeholders in 2017 indicated that they would take notice of the communications mechanisms used by CCWater, as Figure 30 shows.

Around half of all stakeholders (52%) said they would be unlikely to take notice of social media updates.

Primary stakeholders were next asked how easy or difficult it was to contact the right person at CCWater. Of those who were asked this question, the overwhelming majority felt it was easy. Some were also asked if CCWater was dealing with the right person at their organisation. Again, of those who responded the overwhelming majority felt they were.

“No, I never have any issues. I've got most people's mobile phone numbers and email addresses and that sort of thing.”

Primary Stakeholder, Water

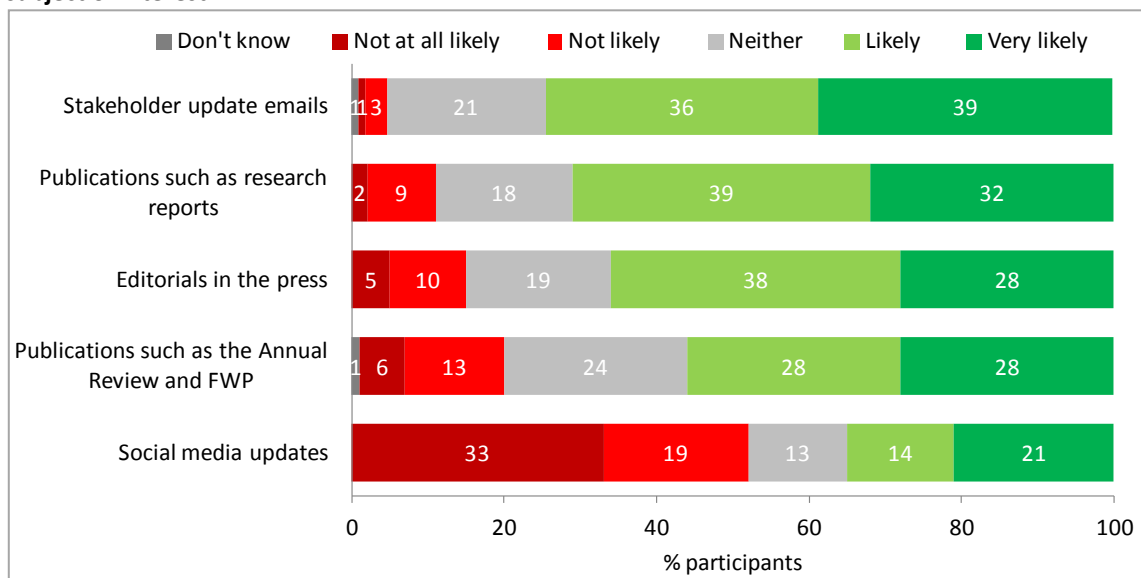
“Yes, I think so. There are good lines of communication, yes. It's pretty clear, so yes.”

Primary Stakeholder, Water

“No, it's very easy, actually. Yes, they're very good. If I leave them a message they always ring back.”

Primary Stakeholder, Water

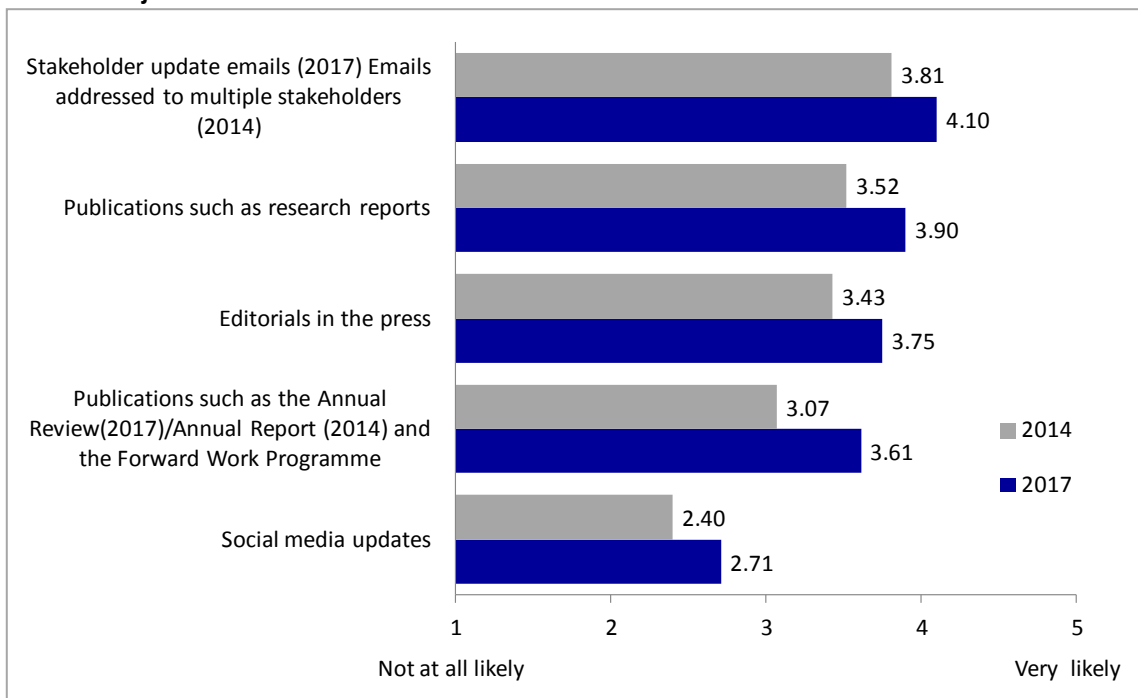
Figure 30: Likelihood of taking notice of different communication methods from CCWater if it is on a subject of interest



Base: Primary, Secondary and Tertiary Stakeholders (106)

Using mean scores in Figure 31, the ranking of popularity of communications mechanisms was the same in 2014 and 2017. However, it also appears that more stakeholders took notice of each mechanism in 2017.

Figure 31: Change in likelihood of taking notice of different communication methods from CCWater if it is on a subject of interest: 2014 to 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=105-106; 2007=73-75)

These findings suggest that CCWater could rely less on social media updates as a means of communicating with stakeholders, compared with the other methods used. However, it is primarily used as a communication tool with consumers. In addition, social media is generally growing in usage so, whilst not as popular at the moment, it should likely still be considered as a channel to ‘build upon’.

5.4 The website

Of those primary stakeholders asked, roughly half had visited the CCWater website in the past year although most, not frequently.

Whilst most rated facets such as ‘ease of use’, relevance of content’ and ‘look and feel’ at average or above, a few raised comments about poor navigability and dated appearance.

If CCWater wishes to enhance its website, the priority should be on improving its look and feel. CCWater may wish to consider further work with stakeholders on how the look and feel of their website may be enhanced.

“Yes, it’s very clear. It’s very clean looking. It’s uncluttered which is all good stuff. It is quite customer focused. It’s got stuff on the banner about affordable bills or saving water or stuff like that, but to me it feels quite static and quite passive.”

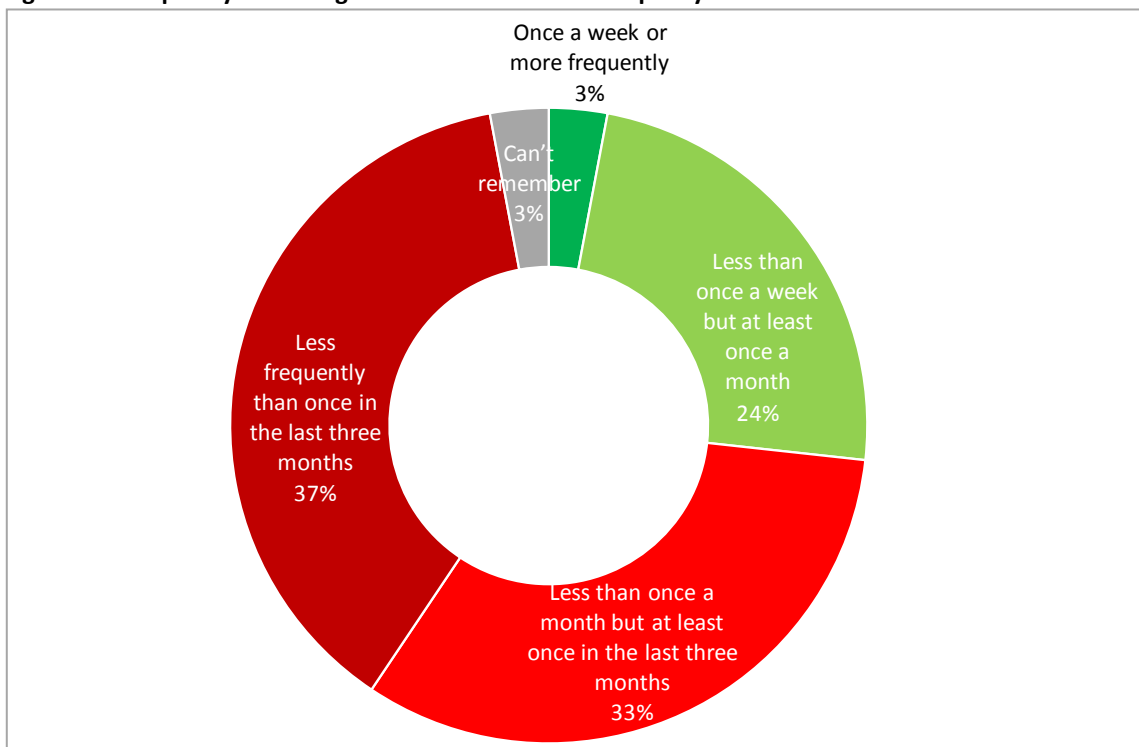
Primary Stakeholder, Regulatory

In the 2017 survey, 70% of stakeholders indicated that they had visited CCWater’s website in the past year. Primary stakeholders seemed to have visited the website much less than secondary or tertiary stakeholders.

Figure 32 shows a wide spread of frequency of use:

- Just over a quarter (26%) had visited it at least once in the past month.
- A third (33%) had visited it less than once a month but more than once in the last three months.
- Just over a third (37%) had visited it less frequently than once in the last three months.

Figure 32: Frequency of visiting CCWater’s website in the past year



Base: Primary, Secondary and Tertiary Stakeholders who had visited the website in the past year (76)

Stakeholders had a positive view of CCWater’s website, but there is room for improvement⁹. None of the mean scores reaches a 4 (a ‘good’ rating), although the rating of the relevance of content and information comes close to that level. The lowest rating was for the look and feel.

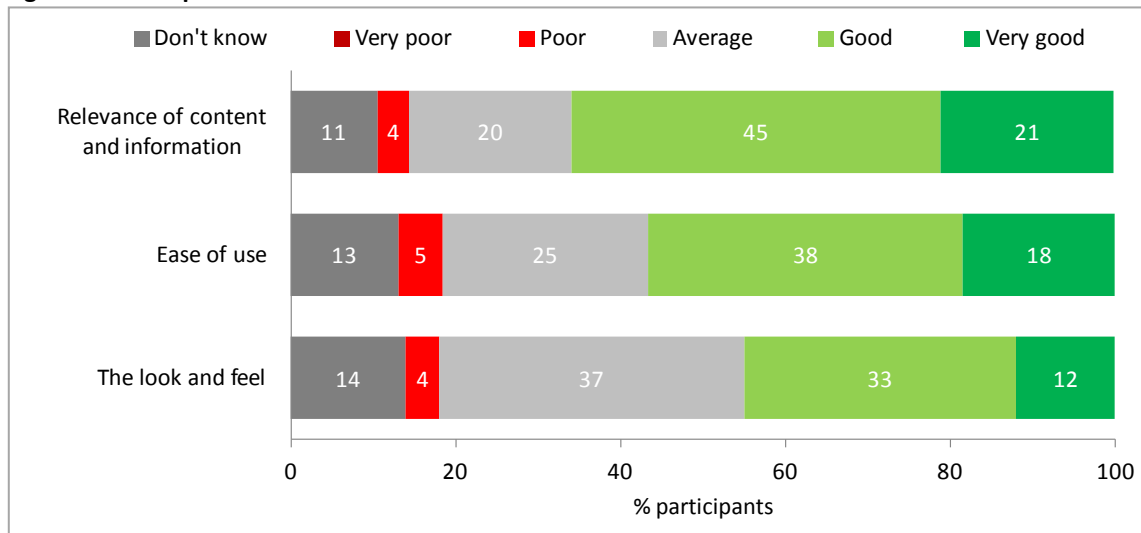
⁹ Improvements have been made to the CCWater website to address issues including its dated appearance and poor navigability. This was in response to user research. The improved site went live in May 2017.

Rating of CCWater’s website (out of 5):

- **3.93** Relevance of content and information
- **3.80** Ease of use
- **3.62** Look and feel

The perceptions by scores awarded are shown in Figure 33.

Figure 33: Perceptions of CCWater’s website in 2017



Base: Primary, Secondary and Tertiary Stakeholders who had visited the website in the past year (76)

Comparisons with 2014’s findings are not presented as the information in 2014 was gathered on a different basis¹⁰.

5.5 E-bulletin – ‘On Tap’

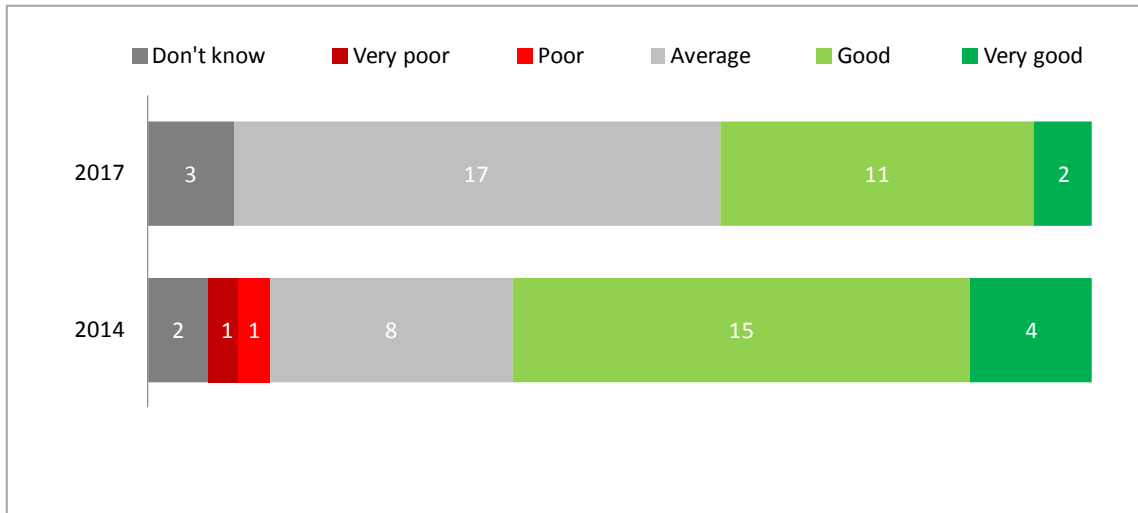
In 2017 31% of stakeholders recalled receiving ‘On Tap’, similar to the 2014 level of 30%.

The low base figures for 2014 (31) and 2017 (33) make it difficult to give a reliable view of stakeholder perceptions of the publication. It would appear that perceptions are less positive in 2017 than they were in 2014 (see Figure 34).

¹⁰ The 2014 and 2017 data are not comparable because of differences in who was asked to comment on CCWater’s website. In 2017 it was anyone who had visited the website in the past year. In 2014 it was anyone who was likely or very likely to take notice of the website.

Figure 34: Perceptions of CCWater’s ‘On-Tap’ E-Bulletin: 2014 and 2017.

Warning as bases are low, the figures shown are the number of responses not the percentage of participants who made them



Base: All those who receive ‘On Tap’. **Warning - low bases:** 2014 (31), 2017 (33)

Few of the primary stakeholders discussed ‘On Tap’ as not many had read it or had only skim read. However, a few comments were made which included: include some ‘lessons learnt’; includes prompts to go to website; and gives an indication of what’s going on; it only covers what CCWater wants to cover.

“No, I think the subject topics within it are fine. Like I say, you click on links and it takes you to the web page so you can, if you have the time, you can navigate round the web pages and find out what else they've got on their site.”

Primary Stakeholder, Water

If CCWater wishes to consider taking these views on board to help improve perceptions of ‘On Tap’, they should do so with caution given the small number of responses which make up the views of stakeholders.

5.6 Forward Work Programme (FWP)

More stakeholders appear to be aware of the work programme in 2017 than in 2014:

2014: **59%** aware that FWP was recently sent out for consultation

2017: **69%** aware that FWP was recently sent out for consultation.

In 2017 more primary than secondary and tertiary stakeholders appeared to be aware of the FWP.

In 2017, half of the organisations said they usually responded to the consultation (50%). Thirty seven per cent did not usually respond, leaving 12 per cent who did not know whether a response was usually made.

A much greater proportion of primary and secondary stakeholders than tertiary stakeholders appeared to respond to the Forward Work Programme. More from the water segment, utilities and representative, professional and industry bodies appeared to respond than from the business customer and the environment group.

Among those who did not usually respond, the chief reasons were ones that appear difficult for CCWater to address:

- 33%: it was not relevant to the organisation concerned.
- 20%: the stakeholder had no time to respond.
- 15%: the stakeholder did not feel it was appropriate to respond.

This suggests that any actions to improve response rates to the Forward Work Programme consultation would need CCWater to make more stakeholders feel it is relevant to their organisation.

The majority of primary stakeholders were aware of the Forward Work Programme being issued with most responding in some way (their organisation, not necessarily personally doing this themselves).

5.7 CCWater reports, projects and activities

When discussing within the depth interviews, primary stakeholders were not overly familiar with the projects and activities that CCWater undertakes for consumers when trying to recall them spontaneously, although many did recall once prompted. The same was also true of CCWater reports.

Awareness of projects or activities aimed at consumers

Awareness of CCWater's projects or activities aimed at consumers is substantially higher than in 2014. The change in the way the question was asked in 2017 may, however, have affected how participants responded and this should be kept in mind when interpreting the findings¹¹:

Spontaneous:

2014: **68%** Unaware of any CCWater projects or activities

2017: **34%** Unaware of any CCWater projects or activities aimed at consumers

¹¹ The 2014 survey asked for awareness of any projects or activities, whereas the 2017 survey asked about awareness of projects and activities aimed at consumers.

Prompted:

2014: **19%** Unaware of any CCWater projects or activities

2017: **3%** Unaware of any CCWater projects or activities aimed at consumers

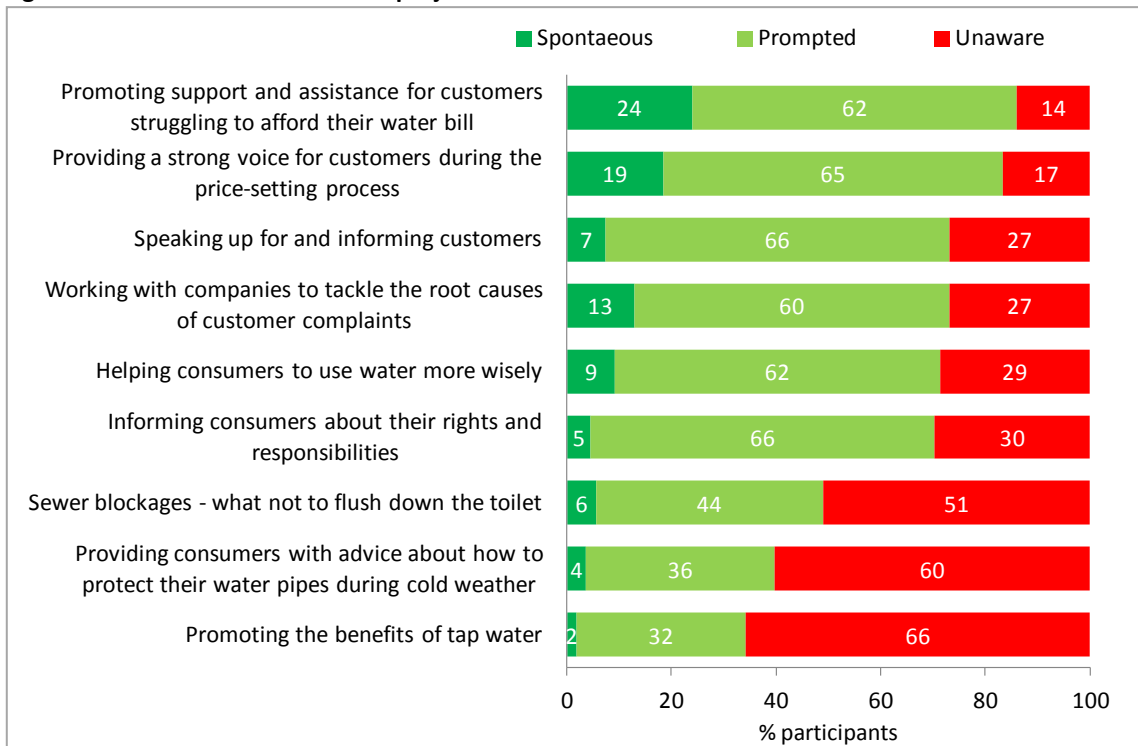
There appeared to be little variation in the proportion unaware among primary, secondary and tertiary stakeholder, either spontaneously or prompted.

Awareness of CCWater’s projects and activities varied, but for the most part were well known. Of the nine projects and activities considered, three projects were known only by a minority of stakeholders.

- Sewer blockages – what not to flush down the toilet
- Providing consumers with advice about how to protect their water pipes during cold weather
- Promoting the benefits of tap water.

The highest levels of spontaneous awareness tended to be matched by the highest levels of prompted awareness as Figure 35 shows.

Figure 35: Awareness of CCWater’s projects and activities aimed at consumers in 2017



Base: Primary, Secondary and Tertiary Stakeholders (108)

Figure 35 is ranked by highest to lowest combined spontaneous and prompted awareness of CCWater’s projects and activities aimed at consumers. This seems to show three clusters for overall awareness:

- Very high levels of awareness (82% to 85% aware)
- High levels of awareness (69% to 72% aware)
- Low levels of awareness (34% to 48% aware)

The projects and activities within each group are as follows (note, combined figures may differ from chart due to rounding):

- **Very high levels of awareness (82% to 85% aware)**
 - 85% Promoting support and assistance for customers struggling to afford their water bill
 - 82% Providing a strong voice for customers during the price-setting process
- **High levels of awareness (69% to 72% aware)**
 - 72% Speaking up for and informing customers
 - 72% Working with companies to tackle the root causes of customer complaints
 - 70% Helping consumers to use water more wisely
 - 69% Informing consumers about their rights and responsibilities
- **Low levels of awareness (34% to 50% aware)**
 - 48% Sewer blockages – what not to flush down the toilet
 - 39% Providing consumers with advice about how to protect their water pipes during cold weather
 - 34% Promoting the benefits of tap water

A number of stakeholders perceived CCWater to be conducting projects or activities that did not fit into this standard listing. The key ones were in the following areas of work:

- 10%: water market reform or deregulation
- 10%: research
- 8%: water company performance or standards of service

There appeared to be little variation in awareness of individual projects or activities between primary, secondary and tertiary stakeholders on the combined prompted and spontaneous measure.

Awareness of research reports and company data

In 2017 participants were asked if they knew that CCWater regularly published consumer research and company data on their website. 79% were aware and 21% were unaware.

Primary stakeholders appeared more aware than secondary and tertiary stakeholders combined. Secondary stakeholders appeared to be more aware than tertiary stakeholders.

Awareness of individual CCWater's research reports and company data publications appears to be better in 2017 than 2014. However, the way the question was asked in 2017 differed from the 2014 survey and may have affected the way participants responded¹²:

Spontaneous:

2014: **69%** unaware of recently published CCWater reports

2017: **45%** unaware of recently published CCWater reports by name or subject matter

Prompted:

2014: **11%** unaware of recently published CCWater reports

2017: **2%** unaware of recently published CCWater reports by name or subject matter

Fewer primary stakeholders than secondary/tertiary cited 'No/Don't know' when asked to name reports spontaneously. There was very little difference between the three groups in not being able to name reports when prompted.

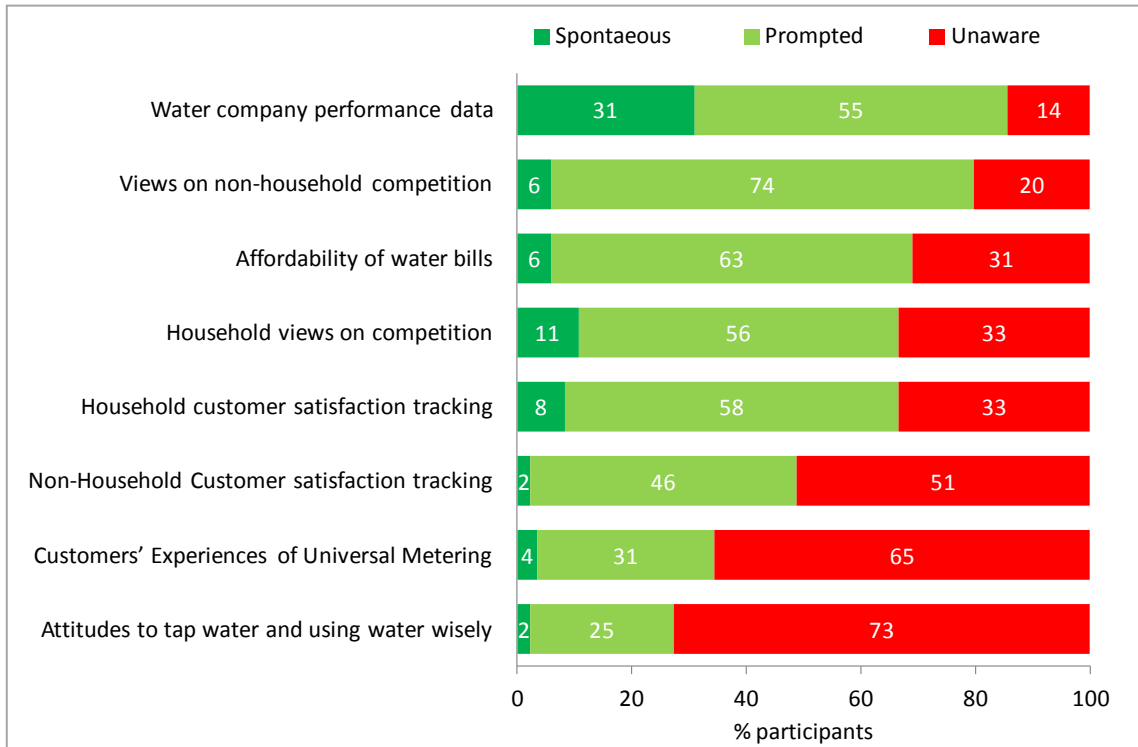
The highest level of both spontaneous awareness and awareness overall was for water company performance data. In all 86% were aware of this information.

The lowest level of awareness was on reports about attitudes towards tap water and using water wisely, where almost three-quarters of stakeholders did not know about them.

Figure 36 shows the findings ranked by highest to lowest combined spontaneous and prompted awareness.

¹² The 2017 survey asked about awareness of recently published reports by CCWater, by name or subject matter and the question was only asked of those who said they were aware that CCWater publishes research reports and data on their website. The 2014 survey asked about awareness of any recently published CCWater reports. All participants were asked this question.

Figure 36: Awareness of CCWater’s reports and company data in 2017



Base: Those aware that CCWater publishes consumer research reports and company data on their website (84-85)

This ranking suggests that overall awareness of consumer research and company data falls into three groups, which are similar to the groupings found in the analysis of projects and activities:

- Very high levels of awareness (78% to 84% aware)
- High levels of awareness (65% to 67% aware)
- Low levels of awareness (27% to 48% aware)

The reports and company data that fall within each group are as follows (note, combined figures may differ from chart due to rounding):

- Very high levels of awareness (78% to 84% aware)
 - 84% Water company performance data
 - 78% Views on non-household competition
- High levels of awareness (65% to 67% aware)
 - 67% Affordability of water bills
 - 65% Household views on competition
 - 65% Household customer satisfaction tracking

- Low levels of awareness (27% to 48% aware)
 - 48% Non-Household Customer satisfaction tracking
 - 34% Customers’ Experiences of Universal Metering
 - 27% Attitudes to tap water and using water wisely.

There was one area where stakeholders recalled a project and/or data that did not fit into the categories used in the research. This was information about complaints¹³ spontaneously mentioned by 13% of participants.

Perceptions of CCWater’s communications overall

Stakeholders were asked how much they agreed or disagreed with the following statements about CCWater communications and research reports:

- 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
- I can easily access complaint information when I need it.

Primary stakeholders rated CCWater communications reasonably highly. When asked about how well CCWater works with stakeholders, primary stakeholders generally give positive comments including: references to their relationships; relationships with regional teams; and, strength of sector knowledge. However, a few did raise some concerns such as: wanting to see more engagement with their particular organisation/wider stakeholders, particularly in relation to the opening of the market; not working in ‘silos’; care not to duplicate effort; and level of influence.

“Yes, it’s sector specific. Because they’re sector specific, they build that expertise, they build that knowledge, they build the understanding, they understand how the industry ticks, they know why we’re different, and they can adapt to those circumstances. I think that’s a key strength.”

Primary Stakeholder, Water

“Not engaging, I think. We’ve only got a customer base of [small], and we’re very small to them, I think.”

Primary Stakeholder, Water

“If it’s customers probably a four but as I said I think there’s possibly wider stakeholders that they don’t engage with really. That’s probably a two or three almost.”

Primary Stakeholder, Water

¹³ This possibly relates to CCWater’s ‘Written Complaints to the Industry’ report, published annually each September.

"I think they do their best, actually. In fact I think I told you, it's very difficult when you've got more than one organisation that represents the customer interests and I think it's quite difficult for them, actually."

Primary Stakeholder, Water

"I think they work effectively with us. I would give them a four out of the five categories. My reservations are at times that I think they perhaps lack a little bit of influence at policy development level, and I fear a little bit that the economic regulator is encroaching a little bit on some ground that I fear - I think that they should probably own."

Primary Stakeholder, Water

It is important for CCWater to strike a balance between maintaining independence whilst working constructively and collaboratively with stakeholders. To understand views around this, primary stakeholders were asked about partnership working. When asked about working in partnership, the majority of primary stakeholders cited examples where they did, or their wish to do so.

"Yes, I think it is appropriate to be collaborative. I'm not sure we're in that zone, as it were...I think we maybe do a bit of work on working out how to - maybe do a bit of sitting back and understanding the nuance of our various objectives and seeing if there is an appropriate way by working in partnership, getting a better outcome for customers."

Primary Stakeholder, Water

"Yes, very, very likely. I mean yes, subject to - I suppose subject to my overriding point that I think they've got a distinct role and I think that may not always put them in agreement with us, but in terms of my willingness to work with them and be transparent with them, yes, absolutely."

Primary Stakeholder, Water

"We'd like to and we'd love them to join us in the argument but, I don't know why, there is reluctance, perceived reluctance for them to get involved. Maybe they see it as too much taking sides, I don't know."

Primary Stakeholder, Water

Primary stakeholders were also asked to consider how CCWater could make the most of current relationships. Of those who responded a range of comments were made. For some this centred on: communications; reviewing the remit of CCWater (care about overlap/be proactive); and being mindful of changes in the sector.

"Keep talking to the boss and making sure there's an appropriate level of contact. We all want to foster these relationships but it's got to be done appropriately. The number of meetings a year; right levels of engagement. Informal, formal, and getting that mix right, which I think it is at the moment, but don't stray too far off course with that."

Primary Stakeholder, Water

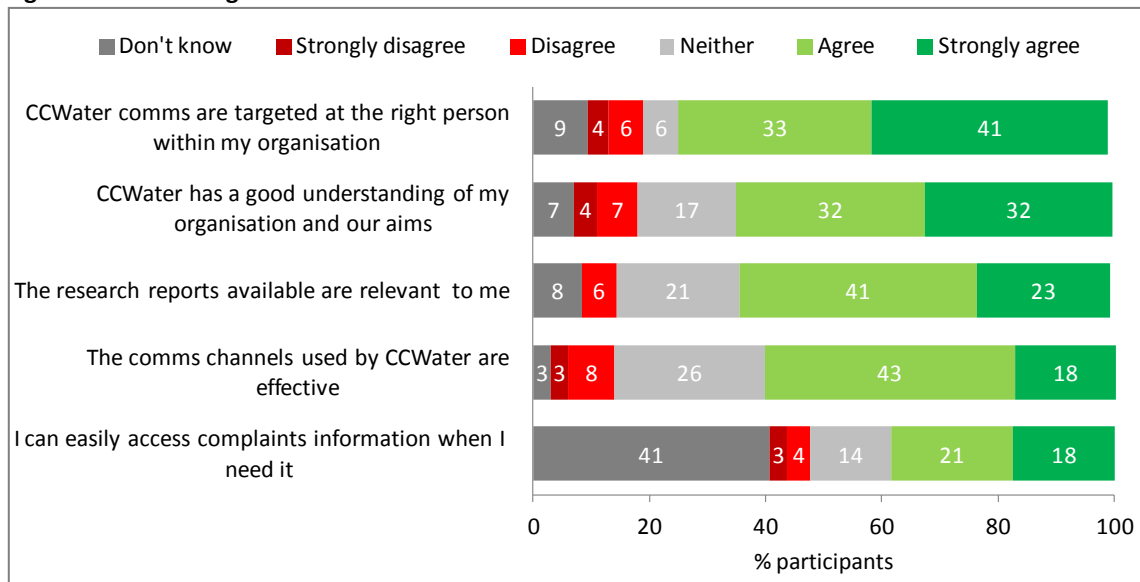
“Perhaps be more proactive in engaging with other people. Yes, I think being proactive would help a lot.”

Primary Stakeholder, Water

Participants were asked to rate their level of agreement using a 5 point scale, where 1 means ‘strongly disagree’ and 5 means ‘strongly agree’.

Figure 37 shows the breakdown of the 2017 findings. They are ranked highest to lowest based on combining ‘agree’ and ‘strongly agree’ scores. In some instances the rankings are affected by the relatively high proportions of participants who did not know the answer.

Figure 37: Level of agreement with statements about CCWater’s communications



Base: Primary, Secondary and Tertiary Stakeholders (108)

The high proportion of ‘don’t knows’ in some questions makes it harder to compare scores. The effect is addressed, as before, by using mean scores.

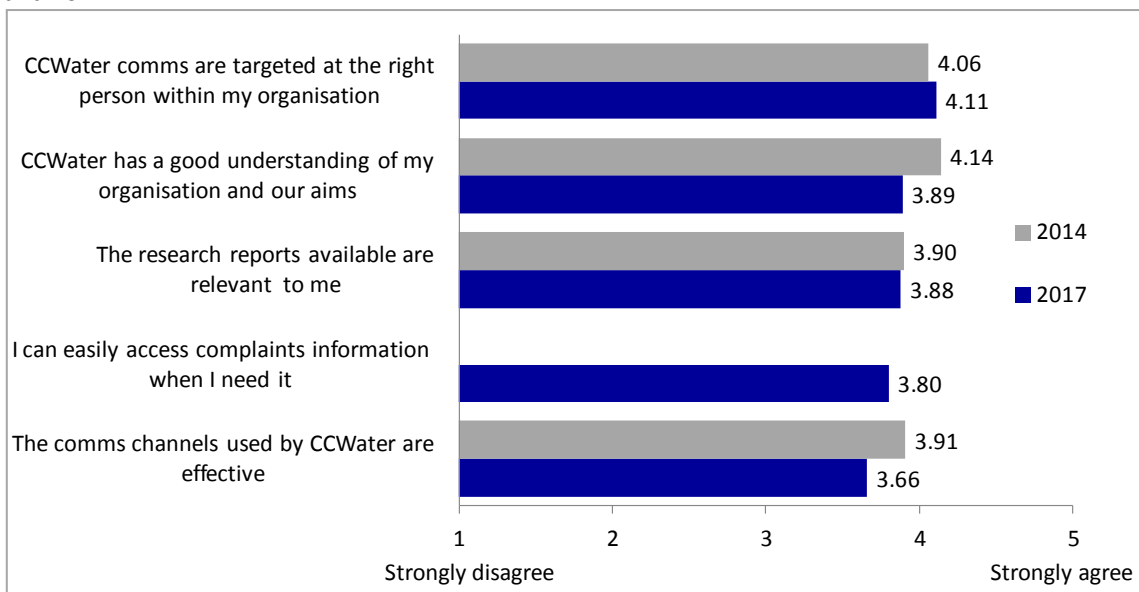
- **4.11** CCWater communication is targeted at the right person within my organisation.
- **3.89** CCWater has a good understanding of my organisation and our aims.
- **3.88** The research reports available are relevant to me.
- **3.80** I can easily access complaint information when I need it.
- **3.66** The communications channels used by CCWater are effective.

CCWater is rated highest on its ability to target communications at the right people in stakeholder organisations. It is seen as least successful in having effective communications channels.

There appeared to be no consistent differences in perceptions across primary, secondary and tertiary stakeholders.

Compared with 2014, almost the same ranking was present in 2017. Ratings for ‘CCWater has a good understanding of my organisation and our aims’ and ‘the communications channels used by CCWater are effective’ appear to have fallen noticeably in 2017. The other scores have either increased or decreased very slightly (see Figure 38).

Figure 38: Level of agreement with statements about CCWater’s communications: means scores 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=64-108; 2014=96-100)

Taking the 2017 scores and changes in perception since 2014, these findings mean that, aside from CCWater’s communications being targeted at the right person within stakeholder organisations, most felt fairly neutral about CCWater’s communications, suggesting that CCWater should try to improve their effectiveness.

Within this, as ‘the communications channels used by CCWater are effective’ and ‘CCWater has a good understanding of my organisation and our aims’ ratings appear to have fallen the most, these should be the priority for CCWater to address.

6. CCWATER ROLE AND POSITIONING

6.1 Chapter summary

CCWater's profile:

- **Overall profile:** Most stakeholders (56%), did not think that CCWater has enough of a profile to do its job adequately. Secondary and tertiary stakeholders thought it had less of a profile in 2017 (21%) than in 2014 (47%). This may reflect the knowledge base of relatively new stakeholders. Among primary stakeholders, opinions were split. Some felt it didn't matter as the majority of water customers were unlikely to encounter problems and didn't need to know about CCWater. Others felt the organisation needed to raise awareness among all water consumers, be more prominent in driving the customer agenda and address complications from the fact that some of its role is duplicated in other organisations.
- **CCWater's approach to ensuring consumers who need them can find them:** The qualitative research shows that primary stakeholders are broadly happy with CCWater's approach of ensuring customers who need their help or advice are sign-posted to them. Positive comments included that the approach should be appropriate both in format of channels and the related cost, although a broader range of channels could be tapped, such as Age UK. Others thought the organisation needed to make better use of digital technologies, particularly to reach a younger audience. In the quantitative survey, fewer stakeholders overall seemed to think that CCWater had the right approach to signposting in 2017 than in 2014 (down from 4.42 out of 5 in 2014 to 4.19 in 2017).

CCWater's effectiveness as a consumer advocate: Primary stakeholders had a range of views about CCWater's effectiveness as a consumer advocate. Positive views included good engagement of the senior CCWater team, the range of fora they use to engage with stakeholders and consumers, its role in policy discussion, sector specific knowledge, their focus on vulnerable customers and having a good evidence base. Negative views were mostly about CCWater's role and remit. This included being more proactive, having a wider role, and other organisations moving into CCWater's space, including Ofwat. Overall, stakeholders seem to think CCWater is less effective in 2017 compared with 2014 (3.63 out of 5 in 2017 vs 4.17 out of 5 in 2014). There is a caveat in this finding as the nature of the question asked in 2017 changed.

6.2 Profile with consumers

CCWater's profile

Primary stakeholders are split as to whether CCWater has enough of a profile with consumers to do its job adequately. Broadly, there is a train of thought that the majority of consumers do not need to know about CCWater as they will not encounter any problems. Essentially, if you haven't a problem, do you need to know about them?

"I don't know. They don't seem like a particularly high-profile organisation. I think they do their job reasonably well. I'm not sure whether profile would assist with that. They've got their targets of dealing with complaints within certain timescales. I'm not sure how profile would assist with that."

Primary Stakeholder, Water

"It's below the radar of most customers, I would suggest, so however hard... It's a problem for the companies as well. How do you engage your customers? How do you promote your service when very many people pay on time and they take the service? If you ask them, 'Were they happy with it?' Yes, they might want to pay a bit less for it maybe or they may want to understand a little bit more about what we're doing, but I think it's because generally we're low profile relative to other sectors, then I think CCWater get caught up with the same issue then."

Primary Stakeholder, Water

The other group of stakeholders raised more negative (less cohesive) views which centred on the following themes:

- Could do more to raise awareness for all
- Should drive customer agenda/be more proactive
- Role within range of other bodies who also represent consumers?
- A query over what contact CCWater had with end consumers?
- Perennial 'battle' – not enough of a problem to give high profile
- Champion of customers who are largely unaware

"I would - my gut feeling would be that that would be adequate but has got room to be better. My caveat on that would be that the 'being better' bit would probably have some increased costs associated with it. My gut feeling is it's probably not far wrong from where it needs to be, and to try and shift it materially would require some significant spend in terms of raising awareness of CCW and so on."

Primary Stakeholder, Water

"No, I don't. There's an awful lot of smoke and noise at the top of the organisation about the customers are the heart of the water company's business and so on, and yet when you get right down to the coalface and you speak to the customers... they have no idea who CCWater is, despite the fact that it's on our website, it's on, I imagine, other water companies websites, so there it is championing the cause of the consumers and I have this extraordinary feeling that the consumers are ... largely unaware of it."

Primary Stakeholder, Water

"But actually for that market to work in the best interests of customers and possibly to avoid complaints needing to happen, we would see a much more active role around driving customer confidence. That's not what we see coming back."

Primary Stakeholder, Regulatory

In 2017, primary, secondary and tertiary stakeholders were asked if they thought that CCWater had enough of a profile to do its job adequately. Most thought they did not:

- **25%** yes
- **56%** no
- **19%** did not know

A minority of primary, secondary and tertiary stakeholders all thought CCWater's profile was adequate, with primary stakeholders giving a slightly higher rating than secondary or tertiary stakeholders; this may be linked to them having, generally, closer links to CCWater.

In comparing the findings of 2017 with 2014, it is necessary to do so on the basis of secondary and tertiary stakeholders only, as this was the base for this question in 2014. Using this definition, much fewer secondary and tertiary stakeholders in 2017 thought that CCWater had enough of a profile with consumers to do its job adequately:

2014: **47%** of secondary and tertiary stakeholders

2017: **21%** of secondary and tertiary stakeholders

In the eyes of secondary and tertiary stakeholders, a key task for CCWater therefore is to raise its profile with consumers.

Approach to signposting water consumers who need CCWater's help

In both 2014 and 2017, all stakeholders were presented with a statement about CCWater's signposting approach and were asked if they agreed or disagreed with it. The statement was:

"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 and on their websites, appears on the back of almost all companies' water bills and in the Yellow Pages."

Stakeholders were asked to rate their level of agreement with this statement using a 5 point scale where 1 means 'strongly disagree' and 5 means 'strongly agree'.

In 2017, primary stakeholders appeared to be in more agreement with CCWater's approach to signposting, than either secondary or tertiary stakeholders. Secondary stakeholders seemed to be in more agreement than tertiary stakeholders.

The water segment appeared to be most strongly in agreement, with government and the environment group least in agreement, but still positive.

The qualitative findings show that primary stakeholders are broadly happy with the approach to signposting. Positive comments included that the approach should be appropriate both in format of channels and the related cost. There were some suggestions made as to other channels that could be used, for example, Citizens Advice, social housing partners and Age UK.

“I think given the vehicles available to them, it's an efficient way of doing it. It doesn't cost any more, does it, to just put something on the back of a bill or in a complaints leaflet? ... As a customer, I think it works. It's low cost, it's efficient, it means that all water companies are signposting consistently, so all customers therefore have equal access.”

Primary Stakeholder, Water

Some primary stakeholders did raise some concerns with the key ones being whether CCWater was utilising digital technologies, particularly to reach a younger audience. A few also noted that using ‘Yellow Pages’ seemed antiquated, although someone did note that this probably suited an older audience. Individuals also noted the following points: the difficulty of raising CCWater’s profile; CCWater needs to do more to head off complaints; and there should be simpler routes for consumers to raise their issues.

“I think for me it's a four but I would - my slight reservation for them is whether they feel that as companies develop their digital and social media channels, whether they are keeping pace with the rate of those developments.”

Primary Stakeholder, Water

“I think they could do more to try and head off the complaints rather than just react to them when they're there.”

Primary Stakeholder, Water

“I think it's good as far as it goes, but it doesn't go far enough and I think all of those methods are quite old-fashioned in terms of signposting... Yellow Pages, yes, that to me feels 20 years old kind of thing and my question would be, well, where are they on social media?”

Primary Stakeholder, Regulatory

In 2017 a large majority (78%) agreed with this approach to signposting. Primary, stakeholders appeared to be more in agreement with this approach than secondary and tertiary stakeholders (88% versus 75%).

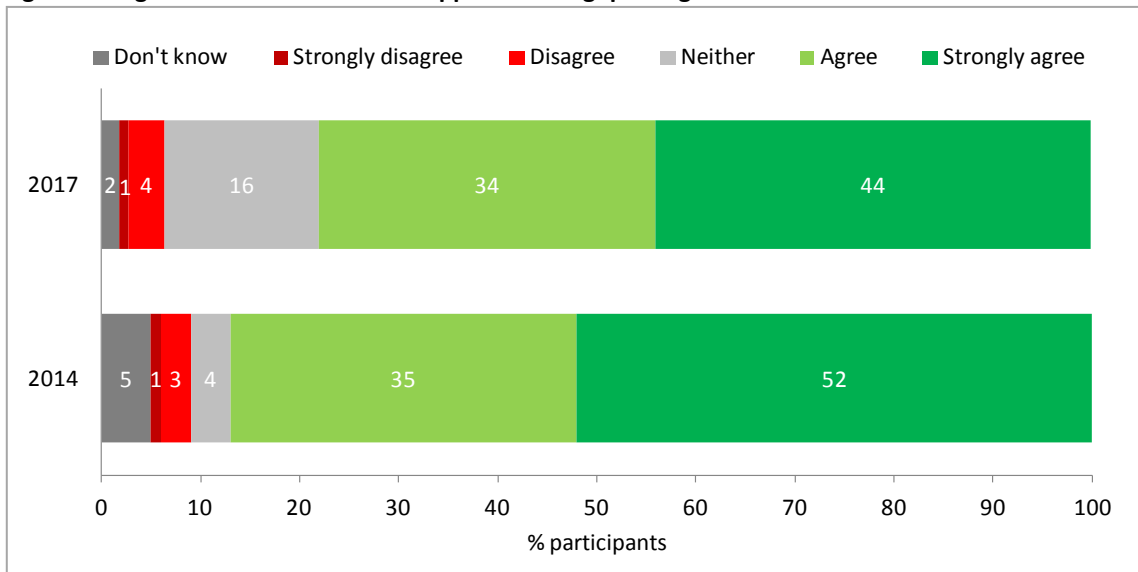
Compared with 2014 mean agreement with CCWater’s approach to signposting seems to have fallen:

2014: **4.42** agreed with CCWater’s approach to signposting

2017: **4.19** agreed with CCWater’s approach to signposting

This was driven by an increase in the proportion of stakeholders who were more neutral about CCWater’s approach (see Figure 39).

Figure 39: Agreement with CCWater’s approach to signposting: 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=109; 2014=100)

6.3 Role as a consumer advocate

Stakeholders were asked how effective they thought CCWater is as a consumer advocate. This was defined as speaking and acting on behalf of consumers, so CCWater can influence decisions at all levels. All were asked to rate CCWater’s effectiveness in this role on a 5 point scale where 1 means ‘not at all effective’ and 5 means ‘very effective’.

Primary stakeholders also discussed this question in more detail and raised a number of issues. On the positive side, CCWater was well thought of by some, with examples of good practice cited, these included: good engagement of the senior team; participation in various fora and CCGs; role in policy discussion; valuable sector specific knowledge and experience; raising ‘vulnerable customers’ up the agenda; and having a good evidence base.

“The idea of it being merged into some wider consumer body, in my view, would be a very retrograde step. I think what CCWater do have is, because they're focussed on single sector and leaving aside we've got a fairly fresh team, they have that focus. They have that understanding. They've build that experience. They've built the understanding of the industry and the understanding of the breadth of the industry from... if they went into a single consumer body, all that experience, all that expertise, all that knowledge would be lost. I think on that basis, it's the right thing to do and continue doing”

Primary Stakeholder, Water

Others raised a range of concerns which were more negative in tone. These mainly surrounded CCWater's role and remit, and focused on views that CCWater should be more proactive/have a wider role. CCWater's relationship with Ofwat was also queried, for example, how much influence does CCWater have? Is Ofwat taking on the consumer agenda? Similarly, are other organisations moving into the 'consumer space' particular with the opening of the market? In addition, the complaints process was viewed as needing simplification by one.

"So, clearly, there's the operational activity of settling complaints. In terms of advocacy, yes, I'm not sure they're that high power an organisation in terms of advocacy."

Primary Stakeholder, Water

"...the economic regulator, Ofwat, steps itself up as the consumers' advocate which almost, in a way, is shutting CCW out, depending on how you read it. Not actually shutting them out but you could be forgiven for thinking that they were. I think this is actually one of the great unresolved issues actually and CCW themselves have been under the cosh for some time as to whether they will continue to survive as an independent organisation and they've been reprieved I think at least twice since I've been around. This doesn't really help their cause either. I actually think that the question of who is the true customer advocate is actually a slightly unresolved question and it needs attending to in my opinion."

Primary Stakeholder, Water

Yes, I also think that the whole complaints process needs to be looked at; it's tortuous for customers...It obviously starts with them complaining through the water company, then CCWater, where they are for example continually having to provide the same information at different stages. They're often not being communicated with by phone, everything has to be done in writing; very old-fashioned and bureaucratic.

Primary Stakeholder, Regulatory

A few other comments were also made concerning teams/personnel (regional better, loss of personal service with more centralisation). Some questions were raised about CCWater's 'audience' which included: does CCWater advocate for the 'masses' (wider) not known to water companies?; if you take the position people can find CCWater if they need them, what happens if they don't know they need them?

"So I think they are reasonably effective. I wonder whether their signposting approach means that it's hard for me to give them a five, in the sense that they're almost adopting a role that says when customers think they need them then they can find them. Is there a – this comes back to cost as well – but is there an element to which sometimes customers don't know that they need something, and sometimes to be proactively made aware is in their interests. I suppose I'm thinking in particular of customers who are vulnerable in some way..."

Primary Stakeholder, Water

In 2017 just over half of stakeholders (55%) perceived CCWater to be effective as a consumer advocate. The scores for primary, secondary and tertiary stakeholders appeared to be similar (primary 58% versus 54% secondary and tertiary).

Perceived effectiveness appears to have fallen between 2014 and 2017 as the mean scores show:

2014: **4.17**

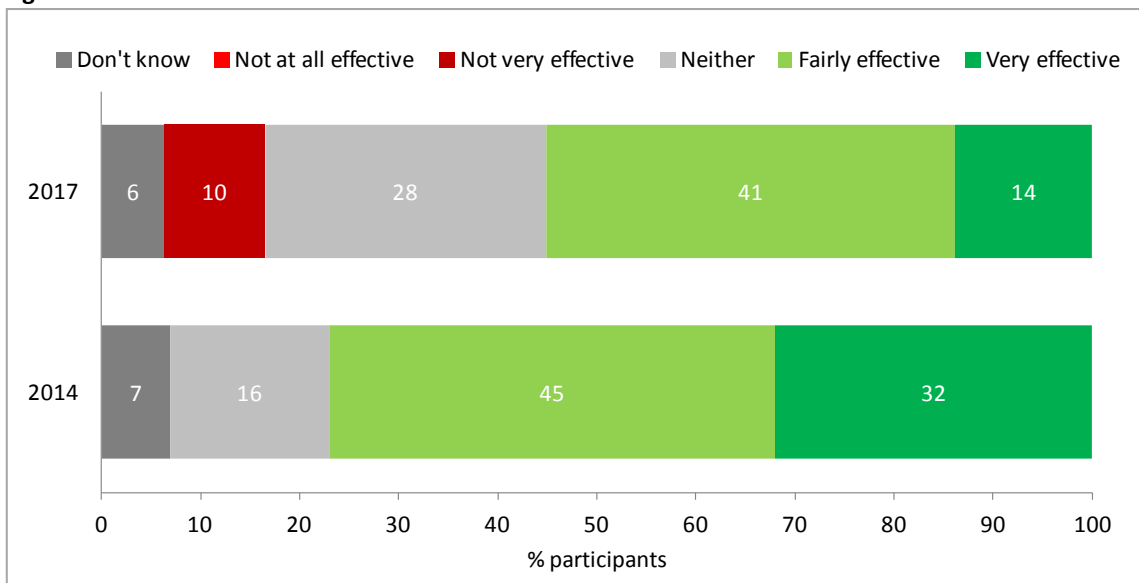
2017: **3.63**

The mean score has dropped below 4 ('fairly effective').

It must be noted, however, that the question in 2017 was more explicit in defining what CCWater's role as a consumer advocate is. This explanation was not given in the 2014 survey. This may, therefore, have affected how stakeholders answered the question in 2017 and may affect the comparison of the 2014 and 2017 data.¹⁴

As Figure 40 shows the fall in ratings appears to be driven by an increase in the proportion who felt neutral about CCWater's effectiveness and by the appearance of those who felt CCWater to be 'fairly ineffective'.

Figure 40: Effectiveness of CCWater as a consumer advocate: 2014 and 2017



Base: Primary, Secondary and Tertiary Stakeholders (2017=109; 2014=105)

In 2017 there was little difference in the perception of CCWater's effectiveness between primary, secondary and tertiary stakeholders.

¹⁴ The differences in the wording of the question about CCWater's effectiveness in the 2014 and 2017 survey are as follows:

2014: How effective do you think CCWater is as a consumer advocate?

2017: How effective do you think CCWater is as a consumer advocate? When we say consumer advocate we mean 'Speaking and acting on behalf of consumers, so CCWater can influence decisions at all levels'

Secondary and tertiary stakeholders who gave CCWater a 'not very effective rating' or who stated they did not know how effective they were, were asked why they scored in this way. As the base is only 13, percentage figures are not used to describe the findings:

- 3 CCWater does not have enough profile
- 3 Water sector is difficult to change
- 2 CCWater needs to have more influence/weight
- 2 CCWater needs to be more proactive
- 2 CCWater needs to have a more expert approach or better strategy
- 3 No experience of CCWater, so too soon to comment
- 3 No evidence of their performance as they have not seen them in action.

7. CONCLUSIONS AND RECOMMENDATIONS

Research context and timing

Conclusions: Putting the findings into context, CCWater has been seeking to widen its stakeholder base and is still developing its relationships with some of them. This is thought to have influenced the higher proportion of neutral and 'don't know' answers compared with 2014.

When the last research was done in 2014, CCWater had just come out of a sensitive price review period which may have affected some stakeholder perceptions; this time CCWater was moving into the early stages of the next price review period and its profile in this area is lower at the moment, although it is likely to increase as the price setting process progresses.

Recommendation: CCWater should further develop relationships and communication with stakeholders so they have a deeper understanding of who CCWater is and what it does, and are able to provide more informed comment.

Satisfaction with CCWater

Conclusions: Stakeholder satisfaction with CCWater remains high – slightly up on 2014 – with positive perceptions among primary stakeholders. However, some say there is room for improvement on collaboration and partnership working, which is a similar theme to the last research.

Recommendation: CCWater should look for opportunities to enhance its relationships with stakeholders and collaborate or work in partnership with them - where appropriate - in the interests of consumers. Also CCWater to look at whether there is scope to increase the number of stakeholder events it holds.

Understanding of what CCWater does

Conclusions: Understanding of what CCWater does appear to have fallen across all stakeholders since 2014, but especially among secondary and tertiary stakeholders.

Recommendation: CCWater should consider how it can raise awareness of its role and value to consumers among stakeholders, particularly secondary and tertiary stakeholders.

CCWater's performance

Conclusions: It is encouraging to see an increase in the proportion of stakeholders who think there is a need for a representative body for water consumers, and that the most important roles are to help consumers with their enquiries and complaints and to work collaboratively with the water industry at a national and regional level and with stakeholders.

Stakeholders seem to perceive that CCWater's performance in carrying out its role to represent the interests of consumers has improved slightly since 2014. However, fewer stakeholders in 2017 were able to say how successful it had been in carrying out specific functions and those who gave a view appear to think it has been slightly less successful.

Recommendations: As a priority CCWater should focus attention on improving its performance in four key areas:

- Helping consumers with their enquiries and to resolve issues and complaints
- Pressing the water industry to protect and help vulnerable customers
- Working collaboratively with the industry at national levels and company level and with stakeholders
- Putting customers at the heart of the Price Review process to ensure fair, affordable bills which are value for money.

Its second priority should be to improve its performance in:

- Pressing for services that are right first time, including safe, reliable and good quality drinking water and sustainable sewerage services
- Providing trusted information evidence and research
- Engaging with the Government on strategic issues.

CCWater's effectiveness as a consumer advocate:

Conclusions: More stakeholders in 2017 appear to think CCWater is less effective as a consumer advocate, although this perception may have been affected by a change in the way they were asked about this.

Primary stakeholders were **positive** about their engagement with CCWater's senior team; the range of fora it uses to engage with them and with consumers; its role in policy discussions, its knowledge of the water sector; its focus on supporting vulnerable customers; and its good evidence base.

But there were some **negative** views about CCWater not being proactive enough; needing to have a wider role; and other organisations moving into the space that CCWater should be owning as the consumer representative.

Recommendation: CCWater should consider how it can take initiatives on key issues to enhance its perceived authority and its voice in influencing consumer issues.

Perceived attributes of CCWater

Conclusions: Stakeholders felt CCWater needed to be more authoritative and better at sharing information. On the matter of information sharing, stakeholders felt that CCWater should be more proactive, ensure that the information it shares is up to date,

be more selective in what information it shares, and strike the right balance in the amount of information it shares with stakeholders.

Recommendation: CCWater should consider if it can enhance its information sharing by addressing stakeholder concerns.

Perceived profile of CCWater

Conclusions: Most stakeholders do not think CCWater has enough of a profile to do its job adequately, especially secondary and tertiary stakeholders. Opinions were split among primary stakeholders: some thought CCWater should raise awareness among all water consumers but others felt that did not matter because not all consumers needed CCWater's help.

Recommendation: CCWater should consider whether its focus should be on raising awareness among all water consumers or focus on raising awareness among those consumers who are most likely to need its help and support.

CCWater's approach to signposting water customers who need their help

Conclusions: Overall, fewer stakeholders think CCWater's has the right approach in signposting consumers who need help. Although primary stakeholders are broadly happy with this approach, some stakeholders thought that CCWater could make use of untapped channels such as charities like Age UK; others think it should make more use of digital technologies to reach a young audience.

Recommendation: CCWater should consider how to enhance signposting through a wider range of stakeholder groups and which digital channels it could use to reach young consumers.

Contact with CCWater

Conclusions: Overall there has been a rise in the proportion of stakeholders who rate their contact with CCWater highly, with regional contacts rated higher than national contact.

Recommendation: CCWater should see whether it can learn any lessons from its engagement at a regional and local level to improve its contact at a national level.

CCWater's communications:

Conclusions: Stakeholders seem more likely to take notice of all forms of communication from CCWater, with more preference for email updates and least preference for social media posts.

However, stakeholders overall felt slightly less informed in 2017 than in 2014, although primary stakeholders felt better informed than secondary and tertiary stakeholders.

Most stakeholders felt they received about the right amount of information, although there was a rise in the proportion of those who felt they did not receive enough.

The highest rated aspect of CCWater's communication was that it was targeted at the right person in the stakeholder's organisation, but fewer stakeholders seemed to feel that CCWater's communication channels were effective. Stakeholders continue to prefer face-to-face, email and telephone communication, with their preference growing for face to face and telephone. However, social media was their least preferred method of communication.

Recommendation: CCWater should consider how it could increase face-to-face communication with stakeholders, perhaps through events. It should also look at how it could increase engagement with stakeholders through email, including its On Tap email newsletter.

APPENDIX A

Introductory letter to primary stakeholders



Dear (Contact Name)

Stakeholder views of Consumer Council for Water

I write to ask you to take part in our stakeholder survey during January and February 2017. CCWater made a number of key changes to what we do, and how we do it, as a result of engaging with stakeholders two years ago. This included:

- Working more closely with water companies and others on areas of common interest. This included collaborative customer research, data for customers about water company performance, such as Discover Water, and long-term resilience of water and sewerage services.
- Increasing our regional focus by holding a Board meeting every two months in Wales or an English region to address in public a key issue with local water companies and other stakeholders.
- Improving the visibility of our advocacy for water customers on issues such as household retail competition.

We now would like to know what you think of CCWater's activities and what else we should do.

As a key stakeholder, we would really like you to help us by taking part in the survey. We have commissioned Accent, an independent research consultancy, to conduct this survey on our behalf. Accent may contact you in the next few weeks and invite you to take part in a confidential interview lasting around 60 minutes, either in person or by telephone at a time of your convenience. Accent may also contact one or two of your colleagues who work with us on different issues in order to get a broader picture of [insert name of organisation's] relationships with CCWater.

CCWater will not know who is being interviewed, unless you give Accent your permission to share your views with us.

If you have any questions you can contact Accent's project manager, Christine Emmerson, by phoning 020 8742 2211 or emailing christine.emmerson@accent-mr.com. You can also contact my colleague, Richard Emmett, on 0121 345 1006 or richard.emmett@ccwater.org.uk.

I hope you can find time to participate in this review. We would be very grateful for your time and comments.

Yours sincerely,



Alan Lovell

Chair, Consumer Council for Water

APPENDIX B

Introductory letter to secondary and tertiary stakeholders



Dear (Contact Name)

Stakeholder views of Consumer Council for Water

I write to ask you to take part in our stakeholder survey in January and February 2017. CCWater made a number of key changes to what we do and how we do it as a result of engaging with stakeholders two years ago. This included:

- Working more closely with water companies and others on areas of common interest. This included collaborative customer research, data for customers about water company performance, such as Discover Water, and long-term resilience of water and sewerage services.
- Increasing our regional focus by holding a Board meeting every two months in Wales or an English region to address in public a key issue with local water companies and other stakeholders.
- Improving the visibility of our advocacy for water customers on issues such as household retail competition.

We now would like to know what you think of CCWater's activities and what else we should do.

As a key stakeholder, we would really like you to help us by taking part in the survey. We have commissioned Accent, an independent research consultancy, to conduct this survey on our behalf. Accent may contact you in the next few weeks and invite you to take part in a confidential interview lasting around 20 minutes.

Accent would conduct this interview by telephone at a time of your convenience. Accent may also contact one or two of your colleagues who work with us in a different context to get a fuller picture of [insert name of organisation] relationships with CCWater.

CCWater will not know who is being interviewed, unless you give Accent your permission to share your views with us.

If you have any questions you can contact Accent's project manager, Christine Emmerson, by phoning 020 8742 2211 or emailing christine.emmerson@accent-mr.com. You can also contact my colleague, Richard Emmett, on 0121 345 1006 or richard.emmett@ccwater.org.uk.

I hope you can find time to participate in this consultation. We would be very grateful for your time and comments.

Yours sincerely,



Alan Lovell

Chair, Consumer Council for Water

APPENDIX C

Quantitative questionnaire

SYSTEM INFORMATION:

Date:

Time interview started:

Introduction

Good morning/afternoon/evening. My name is from Accent and I am carrying out research on behalf of the Consumer Council for Water. Please may I speak to **[NAME FROM SAMPLE]**?

We are conducting stakeholder research on behalf of the Consumer Council for Water (CCWater). You should recently have received an email from Alan Lovell (CCWater's Chair) informing you about the study and asking for your help with this. The questions 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 without your permission and all results will be combined together for analysis purposes.

This is a *bona fide* market research exercise. It is being conducted under the Market Research Society Code of Conduct which means that any answers you give will be treated in confidence. This call may be recorded for quality control purposes.

Is this something you would be willing to participate in?

As mentioned, the questionnaire will take about 20 minutes to complete. You do not have to answer questions you do not wish to and you can terminate the interview at any point.

[If stakeholder does not remember the introductory letter or are sure that they have not received it offer to send again by email]

Section 1: Stakeholder profile and relationship with CCWater

Q1. **DUMMY QUESTION Stakeholder level (ie primary, secondary, tertiary) to be pulled through from the contact database.**

QUOTA POINT

Q2. **DUMMY QUESTION Stakeholder theme (ie water, media, consumer) to be pulled through from the contact database.**

QUOTA POINT

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? **SINGLE CODE – DO NOT READ CODE**

1. Yes, industry focus
2. No, broader remit
3. Don't know

Q4. Now, could you tell me how you feel about CCWater in your own words?

PROBE FULLY AND PROMPT AS NEEDED eg 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?

OPEN RESPONSE

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

1. Not at all well
2. Not very well
3. Neither
4. Fairly well
5. Very well
6. Don't know **DO NOT READ**

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**

1. Stranger – not at all close
2. Acquaintance – not close
3. Colleague – shared goals
4. Friend – close with shared experiences
5. Partner – very close with shared values
6. Don't know **DO NOT READ**

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

1. Yes
2. No
3. Don't know

Q8. **IF Q7=NO** Why do you say that?

OPEN RESPONSE

Q9. 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**

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree
6. Don't know **DO NOT READ**

Section 2: Importance of role of consumer representative organisation

Q10. How effective do you think CCWater is as a consumer advocate? When we say consumer advocate we mean 'Speaking and acting on behalf of consumers, so CCWater can influence decisions at all levels'. **READ OUT SINGLE CODE**

1. Not at all effective **GO TO Q11**
2. Not very effective **GO TO Q11**
3. Neither
4. Fairly effective
5. Very effective
6. Don't know **DO NOT READ GO TO Q11**

Q11. **IF Q10=1 or 2 or 6 [NOT AT ALL EFFECTIVE OR NOT VERY EFFECTIVE OR DON'T KNOW]**

Why do you say that? **DISPLAY [RESPONSE AT WAS "Q10"]**

OPEN RESPONSE

	1. Not at all important	2. Not important	3. Neither /nor	4. Important	5. Very important	(Don't know)
Engaging with the Government on strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1. Very unsuccessful	2. Unsuccessful	3. Neither /nor	4. Successful	5. Very successful	(Don't know)
Engaging with the Government on strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Perceptions of CCWater's performance

Q13. **DELETED (COMBINED WITH Q12)**

Q14. In your opinion, has the performance of CCWater improved, declined or stayed the same over the past two years? And would you say that is a little or a lot? When we say performance we mean how effective CCWater has been in fulfilling its statutory role to represent the interests of water consumers' **SINGLE CODE**

1. Declined a lot **Go to Q15**
2. Declined a little **Go to Q15**
3. Stayed the same **Go to Q17**
4. Improved a little **Go to Q16**
5. Improved a lot **Go to Q16**
6. Don't know **DO NOT READ Go to Q17**

Q15. **IF DECLINED A LITTLE/A LOT AT Q14=1 or 2** Why do you say that you think CCWater's performance has declined over the past two years? **PROBE FULLY – IN PARTICULAR PROBE ABOUT ANY DIFFERENCES IN LAST TWO YEARS AND WHAT IT RELATES TO**

INTERVIEWER – IF ANY COMMENTS ARE MADE ABOUT OFFICE CLOSURES PROBE TO SEE WHAT THE IMPACT OF THIS HAS ON CCWATER SERVICE

OPEN RESPONSE

Q16. **IF IMPROVED A LITTLE/A LOT AT Q14 = 4 or 5** Why do you say that you think CCWater's performance has improved over the past two years? **PROBE FULLY – IN PARTICULAR PROBE ABOUT ANY DIFFERENCES IN LAST TWO YEARS AND WHAT IT RELATES TO**

INTERVIEWER – IF ANY COMMENTS ARE MADE ABOUT OFFICE CLOSURES PROBE TO SEE WHAT THE IMPACT OF THIS HAS ON CCWATER SERVICE

OPEN RESPONSE

Section 4: Attributes describing CCWater

Q17. Thinking about CCWater generally how would you rate it on the following attributes where 1 is not at all well 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"/>
Its policies are based on 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"/>
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 on consumer issues	<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"/>
It is a trustworthy source of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 5a: Communications from CCWater

Q18. In the past 2 years in which of the following ways have you been involved with CCWater? **READ LIST SELECT ALL THAT APPLY - MULTICODE**

1. Policy Development
2. Complaint handling
3. Consultation
4. Consumer representation
5. Other (please specify)
6. Don't know **DO NOT READ – NOT WITH ANY OTHER CODE**

Q19. Overall, how well informed do you feel about the work of CCWater? **READ OUT SINGLE CODE**

1. Very uninformed
2. Fairly uninformed
3. Neither
4. Fairly informed
5. Very informed
6. Don't know **DO NOT READ**

Q20. Would you say you receive too little, about the right amount or too much information from CCWater? **READ OUT - SINGLE CODE**

1. Too little
2. About the right amount
3. Too much
4. Don't know **DO NOT READ**

Q21. Do you receive the quarterly 'On Tap' email newsletter?

1. Yes **GO TO Q22**
2. No
3. Don't know

Q22. **IF YES AT Q21 (RECEIVE ON TAP)** Where 1 is very poor and 5 is very good, how would you rate 'On Tap'?

1. Very poor **GO TO Q23**
2. Poor **GO TO Q23**
3. Average
4. Good
5. Very good
6. Don't know **DO NOT READ**

Q23. **IF Q22=1 or 2 [VERY POOR OR POOR]** Why have you rated 'On Tap' as poor? How can it improve? **PROBE FULLY**

OPEN RESPONSE

Q24. How likely are you to take notice of the following types of communication from CCWater, if it's on a subject of relevance to you?

ROTATE ORDER OF PRESENTATION	1. Not at all likely	2. Not likely	3. Neither / nor	4. Likely	5. Very likely	(Don't know)
Stakeholder update emails	<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"/>
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 Review and Forward Work Programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social media updates such as Twitter, LinkedIn and Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q25. Have you visited the CCWater website at all in the past year?

1. Yes
2. No

Q26. **IF Q25= 1 (YES)** How often have you visited the CCWater website in the past year?

1. Once a week or more frequently
2. Less than once a week but at least once a month
3. Less than once a month but at least once in the last three months
4. Less frequently than once in the last three months
5. Can't remember

Q27. **ASK THOSE WHO HAVE VISITED THE WEBSITE AT Q25=1**

And using the scale where 1 is very poor and 5 is very good, 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. Average	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"/>

Q28. What CCWater projects or activities, aimed at consumers, are you or your organisation aware of?

DO NOT READ – SPONTANEOUS RESPONSE - MULTICODE

	Q28. Spontaneous CODE INTO LIST
Helping consumers to use water more wisely	<input type="checkbox"/>
Promoting the benefits of tap water	<input type="checkbox"/>
Promoting support and assistance for customers struggling to afford their water bill	<input type="checkbox"/>
Informing consumers about their rights and responsibilities	<input type="checkbox"/>
Working with companies to tackle the root causes of customer complaints	<input type="checkbox"/>
Speaking up for and informing customers	<input type="checkbox"/>
Providing a strong voice for customers during the price-setting process	<input type="checkbox"/>
Sewer blockages – what not to flush down the toilet	
Providing consumers with advice about how to protect their water pipes during cold weather	
Other – please specify	<input type="checkbox"/>
None/Don't know	<input type="checkbox"/>

Q29. Have you heard of any of the following projects and activities, aimed at consumers? **READ THOSE NOT SPECIFIED AT Q28, BUT IF ALL EXCEPT “NONE/DON’T KNOW/OTHER” ARE TICKED AT Q28 SKIP TO Q30**

ONLY DISPLAY CODES NOT MENTIONED AT Q28

ROTATE ORDER OF PRESENTATION	Q29 Prompted READ LIST
Helping consumers to use water more wisely	<input type="checkbox"/>
Promoting the benefits of tap water	<input type="checkbox"/>
Promoting support and assistance for customers struggling to afford their water bill	<input type="checkbox"/>
Informing consumers about their rights and responsibilities	<input type="checkbox"/>
Working with companies to tackle the root causes of customer complaints	<input type="checkbox"/>
Speaking up for and informing customers	<input type="checkbox"/>
Providing a strong voice for customers during the price-setting process	<input type="checkbox"/>
Sewer blockages – what not to flush down the toilet	<input type="checkbox"/>
Providing consumers with advice about how to protect their water pipes during cold weather	<input type="checkbox"/>
None/Don’t know	<input type="checkbox"/>

Q30. Did you know that CCWater regularly publishes consumer research reports and company data on their website?

1. Yes Go to Q31
2. No Go to Q33

Q31. **SKIP IF Q30=2 ELSE ASK** Are you aware of any reports recently published by CCWater, either by name or by subject matter?

DO NOT READ – SPONTANEOUS RESPONSE - MULTICODE

SELECT CODE IF EITHER THE TITLE OF THE REPORT OR THE SUBJECT MATTER IN BRACKETS IS MENTIONED

	Q31 Spontaneous CODE INTO LIST
'Delving into Water 2016: Performance of the water companies in England and Wales 2011-12 to 2015-16' (water company performance data)	<input type="checkbox"/>
'Beneath the Surface: Customers' Experiences of Universal Metering'	<input type="checkbox"/>
'Testing the Waters: Business customers' views on their water and sewerage services 2016' (non-household/business customer satisfaction tracking)	<input type="checkbox"/>
'Open for Business: Lessons for the non-household retail water market in England based on customer experiences in Scotland' (views on non-household/business competition)	<input type="checkbox"/>
'Attitudes to tap water and using water wisely'	<input type="checkbox"/>
'Delivering Affordability Assistance to water customers: cross-sector lessons' (affordability of water bills)	<input type="checkbox"/>
'Water Matters: Household customers' views on their water and sewerage services 2015' (household customer satisfaction tracking)	<input type="checkbox"/>
'Floating the idea': household customers' views on water market reform in England (household views on competition)	<input type="checkbox"/>
Other – please specify	<input type="checkbox"/>
None/Don't know	<input type="checkbox"/>

Q32. **SKIP IF Q30=2 ELSE ASK** CCWater has published a range of reports on a variety of subject areas. Have you heard of any of CCWater’s reports on the following subject areas? **READ THOSE NOT SPECIFIED AT Q31/ BUT IF ALL EXCEPT “NONE/DON’T KNOW” ARE TICKED AT Q31 SKIP TO Q33**

ONLY DISPLAY CODES NOT MENTIONED AT Q31 [CODES LISTED IN ORDER AS IN Q31]

ROTATE ORDER OF PRESENTATION	Q31 Spontaneous CODE INTO LIST
Water company performance data	<input type="checkbox"/>
Customers’ Experiences of Universal Metering	<input type="checkbox"/>
Non-Household Customer satisfaction tracking	<input type="checkbox"/>
Views on non-household competition	<input type="checkbox"/>
Attitudes to tap water and using water wisely	<input type="checkbox"/>
Affordability of water bills	<input type="checkbox"/>
Household customer satisfaction tracking	<input type="checkbox"/>
Household views on competition	<input type="checkbox"/>
None/Don’t know	<input type="checkbox"/>

Q33. **SKIP IF Q30=1 ELSE ASK** Recent reports on the website include Water company performance data, Household and Non Household Customer satisfaction tracking, Customers’ experiences of Universal metering, Household and Non-household competition, Affordability of water bills and Attitudes to tap water and using water wisely. Are reports like this of interest to you?

1. Yes
2. No **GO TO Q34**

Q34. **SKIP IF Q30=1 AND SKIP IF Q33=1 (YES)** What kind of reports would be of interest to you?
OPEN REPOSE

Q35. CCWater’s draft Forward Work Programme was recently sent out for consultation. Were you aware of this?

1. Yes
2. No
3. Don’t know

Q36. Do you or does your organisation usually respond to the Forward Work Programme consultation?

1. Yes
2. No
3. Don’t know/Unsure

Q37. **IF Q36= 2** Can you tell me why your organisation doesn't usually respond to the Forward Work Programme consultation? **DO NOT READ - MULTICODE AS APPROPRIATE**

1. Not relevant to our organisation
2. No time to respond
3. Didn't have response to make
4. Other, specify
5. Don't know/Unsure

Q38. 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? **READ EACH STATEMENT**

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"/>
I can easily access complaint information when I need it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 5b: Communicating with CCWater

Q39. On average, how often do you personally deal with CCWater? **SINGLE CODE INTO BELOW – DO NOT READ**

1. Once a week or more
2. Once or twice a month
3. Once every two or three months
4. Once every four to six months
5. Once a year
6. Less often
7. Never
8. Don't know

Q40. **IF Q39 = “NEVER” OR “DON’T KNOW” SKIP TO Q42** Do you deal with regional or national level CCWater staff, or both? **MULTICODE – PROMPT TO CLARIFY IF REQUIRED**

1. Regional – England
2. Regional - Wales
3. National - England
4. National - Wales
5. Don’t know **NOT WITH OTHER CODES**

Q41. Where 1 is Very Poor and 5 is Very Good, how would you rate the contact you have had with...
[DISPLAY CODES SELECTED AT Q40]

	1. Very poor	2. Poor	3. Average	4. Good	5. Very good	(Don’t know)
DISPLAY IF Q40=1 Regional - England staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DISPLAY IF Q40=2 Regional - Wales staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DISPLAY IF Q40=3 National – England staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DISPLAY IF Q40=4 National – Wales staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q42. How would you (or your organisation) prefer to engage with CCWater? **READ LIST - MULTICODE**

1. Face-to-face
2. Telephone
3. Letter
4. Email
5. Website
6. Stakeholder event
7. Social media
8. Other (please specify)
9. Don’t know **DO NOT READ – NOT WITH ANY OTHER CODE**

Section 6: Overall satisfaction with CCWater

Q43. 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**.

0. Extremely dissatisfied
- 1.
- 2.
- 3.
- 4.
5. Neither/nor
- 6.
- 7.
- 8.
- 9.
10. Extremely satisfied
11. Don’t know

Q44. Overall, how important is it to you to have an organisation with CCWater's role?

READ LIST SINGLE CODE

1. Not essential
2. Not important
3. Important
4. Essential
5. Don't know **DO NOT READ**

Final thoughts

Q45. We are now almost at the end of the survey, do you have any final comments to make regarding your relationship with CCWater, its activities or strategic aims?

PROBE FULLY

Q46. **ASK IF Q10=1 [IF CCWATER NOT AT ALL EFFECTIVE IN ROLE AS CONSUMER ADVOCATE] OR IF Q14=1 [PERFORMANCE DECLINED A LOT] OR Q43=0 or 1 or 2 [EXTREMELY DISSATISFIED OVERALL]**

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

1. Yes
2. No

Q47. **IF Q46=1 Yes:** Are you happy for us to pass your contact details on to CCWater and ask them to contact you directly.

1. Yes
2. No

Q48. **IF Q47=1 Yes** Can you briefly tell me what your concerns are so we can pass them onto CCWater before they contact you?

Interview note respondent's concerns to pass to CCWater

2. No specific concern to pass on or do not wish to say

Q49. **IF Q47=2 No** As you do not wish for us to pass on your contact details, CCWater will not be in touch to discuss your concerns.

Q50. **FOR PILOT ONLY SKIP IF MAIN STAGE [NO RECORDING REQUIRED AT MAIN STAGE]** CCWater would like to listen to some of the interviews to gain a sense of what people are saying and check how the interviews are being conducted. Do you give permission for your recording to be passed to CCWater? Please note, depending on what you have said in the interview, they may be able to identify who you are.

1. Yes, I give my permission to pass on the recording
2. No, I do not give my permission to pass on the recording

Q51. We really appreciate the time that you have given us today. Would you be willing to be contacted again for clarification purposes or be invited to take part in other related research for CCWater?

1. Yes, for both clarification and further related research
2. Yes, for clarification only
3. Yes, for further research only
4. No

Q52. **IF Q33=1 (YES)** You mentioned earlier that the consumer research reports and company data on the website would be of interest. Just to confirm, these are available at:
<http://www.cewater.org.uk/blog/category/reports/>

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm my credentials or those of Accent, please call the MRS free on 0500 396999.

Please can I take a note of your name and where we can contact you for quality control purposes?

Respondent name: [CATI: DP, IMPORT FROM ID]

Telephone: [CATI: DP, IMPORT FROM TELNUMBER]

Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes
No

SYSTEM INFORMATION

Time interview completed:

INTERNAL USE ONLY: [Click here](#)

Online only	<input type="checkbox"/>				
CATI only	<input type="checkbox"/>	(DP: add QAX)			
CAPI/Tablet	<input type="checkbox"/>	(BCQs:) QAZ2	Paper showcard? Y	<input type="checkbox"/>
CATI recruit for online/field	<input type="checkbox"/>	(BCQs:) QAZ3	N	<input type="checkbox"/>
Field recruit for online/CATI	<input type="checkbox"/>	(BCQs:) QAZ1		
Recruit only (ie for qual)	<input type="checkbox"/>				

APPENDIX D

Qualitative discussion guide



Moderator:

Depth:

Date:

Time:

Venue:

Good morning/afternoon/evening... My name is ... and I work for an independent market research company called Accent. We are conducting research for CCWater looking at experiences and perceptions of CCWater. Thank you very much for agreeing to help us with this research.

The research is being conducted in accordance with the Code of Conduct of the Market Research Society (MRS) and also with the Data Protection Act, with whom Accent is registered. This means that everything you say is confidential and will not be attributed to you personally unless you give your permission for us to pass your comments on in named format.

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.

Our discussion is being recorded. This is standard market research procedure and is to ensure accuracy – so I do not have to try to remember what you have said – and for analysis purposes only. The recordings will not be passed to any third party not associated with the research project, including CCWater, and in our reporting of the findings from this research everything that you say will be confidential, unless you give your permission for us to pass your name and comments on.

The discussion will last around 60 minutes.

Can I stress that we are looking for your views. There are no right or wrong answers.

Stakeholder profile and relationship with CCWater 10 mins (10)

- 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 questions asks

Q1. How well would you say you understand what CCWater does? READ OUT – SINGLE CODE

1. Not at all well
2. Not very well
3. Neither
4. Fairly well
5. Very well
6. Don't know **DO NOT READ**

• Why do you say that?

- **IF NOT VERY/NOT AT ALL WELL/NEITHER** – Do you feel that this is sufficient 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?

Q2. 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

1. Stranger – not at all close
2. Acquaintance – not close
3. Colleague – shared goals
4. Friend – close with shared experiences
5. Partner – very close with shared values
6. Don't know **DO NOT READ**

• 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?

Q3. Do you think CCWater has enough of a profile with consumers to do its job adequately?

1. Yes
2. No
3. Don't know

Q4. ASK ALL IF Q7=NO Why do you say that?

OPEN RESPONSE

- **IF YES/DON'T KNOW** Why do you say that?

OPEN RESPONSE

-
- Q5. 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**

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree
6. Don't know **DO NOT READ**

- **IF STRONGLY DISAGREE/DISAGREE –** Why do you say that?

Section 2: Importance of role of consumer representative organisation 10 mins (20)

-
- Q6. How effective do you think CCWater is as a consumer advocate? When we say consumer advocate we mean 'Speaking and acting on behalf of consumers, so CCWater can influence decisions at all levels'. **READ OUT SINGLE CODE**

1. Not at all effective **GO TO Q11**
2. Not very effective **GO TO Q11**
3. Neither
4. Fairly effective **ALSO CAPTURE AT Q11**
5. Very effective **ALSO CAPTURE AT Q11**
6. Don't know **DO NOT READ GO TO Q11**

sewerage services (DO NOT SHOW ON CATI - MAPS TO PRIORITY 1, 3 and 4)						
	1. Very unsuccessful	2. Unsuccessful	3. Neither /nor	4. Successful	5. Very successful	(Don't know)
Pressing for services that are right first time including 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"/>	<input type="checkbox"/>
	1. Not at all important	2. Not important	3. Neither /nor	4. Important	5. Very important	(Don't know)
Working collaboratively with the industry at national level and company level and with stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1. Very unsuccessful	2. Unsuccessful	3. Neither /nor	4. Successful	5. Very successful	(Don't know)
Working collaboratively with the industry at national level and company level and with stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1. Not at all important	2. Not important	3. Neither /nor	4. Important	5. Very important	(Don't know)
Engaging with the Government on strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1. Very unsuccessful	2. Unsuccessful	3. Neither /nor	4. Successful	5. Very successful	(Don't know)
Engaging with the Government on strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Why have you rated **[INSERT THOSE RATED HIGHLY – IF ANY]** as important?
- And why have you rated **[INSERT THOSE RATED LOW – IF ANY]** as not important?
- Are there any other areas that you think should be a priority for CCWater?
- Why do you think CCWater is very successful at **[SELECT ONES RATED HIGHLY – IF ANY]** ?
- And why do you think CCWater is very unsuccessful at **[SELECT ONES RATED LOW – IF ANY]**?
- **IF ITEMS RATED AS IMPORTANT [Q8] BUT UNSUCCESSFUL PROBE:** I can see you have rated **[INSERT AS APPROPRIATE]** as important but unsuccessful, why is that?

Section 3: Perceptions of CCWater's performance 10 mins (30)

Q9. DELETED COMBINED WITH Q12:

Q10. In your opinion, has the performance of CCWater improved, declined or stayed the same over the past two years? And would you say that is a little or a lot? When we say performance we mean how effective CCWater has been in fulfilling its statutory role to represent the interests of water consumers' **SINGLE CODE**

1. Declined a lot **Go to Q15**
 2. Declined a little **Go to Q15**
 3. Stayed the same **Go to Q17**
 4. Improved a little **Go to Q16**
 5. Improved a lot **Go to Q16**
 6. Don't know **DO NOT READ Go to Q17**
-

Q11. IF DECLINED A LITTLE/A LOT AT Q14=1 or 2 Why do you say that you think CCWater's performance has declined over the past two years? **PROBE FULLY – IN PARTICULAR PROBE ABOUT ANY DIFFERENCES IN LAST TWO YEARS AND WHAT IT RELATES TO**

INTERVIEWER – IF ANY COMMENTS ARE MADE ABOUT OFFICE CLOSURES PROBE TO SEE WHAT THE IMPACT OF THIS HAS BEEN ON CCWATER SERVICE

OPEN RESPONSE

Q12. IF IMPROVED A LITTLE/A LOT AT Q14 = 4 or 5 Why do you say that you think CCWater's performance has improved over the past two years? **PROBE FULLY – IN PARTICULAR PROBE ABOUT ANY DIFFERENCES IN LAST TWO YEARS AND WHAT IT RELATES TO**

INTERVIEWER – IF ANY COMMENTS ARE MADE ABOUT OFFICE CLOSURES PROBE TO SEE WHAT THE IMPACT OF THIS HAS BEEN ON CCWATER SERVICE

OPEN RESPONSE

- Specifically, in what ways do you think that CCWater needs to improve its performance or concentrate on making improvements?

Section 4: Attributes describing CCWater 5 mins (35)

Q13. Thinking about CCWater generally how would you rate it on the following attributes where 1 is not at all well and 5 is very well. READ STATEMENTS

	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"/>
Its policies are based on 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"/>
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 on consumer issues	<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"/>
It is a trustworthy source of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Section 5a: Communications from CCWater 5 mins (40)

Q14. In the past 2 years in which of the following ways have you been involved with CCWater? READ LIST SELECT ALL THAT APPLY - MULTICODE

1. Policy Development
2. Complaint handling
3. Consultation
4. Consumer representation
5. Other (please specify)
6. Don't know **DO NOT READ – NOT WITH ANY OTHER CODE**

- 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 [INSERT]? Was this successful? Why?

Q15. Overall, how well informed do you feel about the work of CCWater? READ OUT SINGLE CODE

1. Very uninformed
2. Fairly uninformed
3. Neither
4. Fairly informed
5. Very informed
6. Don't know **DO NOT READ**

Q16. Would you say you receive too little, about the right amount or too much information from CCWater? **READ OUT - SINGLE CODE**

- 5. Too little
- 6. About the right amount
- 7. Too much
- 8. Don't know **DO NOT READ**

- **IF TOO LITTLE** – What else would you like to receive from CCWater?

Q17. Do you receive the quarterly 'On Tap' email newsletter?

- 1. Yes **GO TO Q22**
- 2. No
- 3. Don't know

- Do you read it? What do you think of it?

Q18. **IF YES AT Q21 (RECEIVE ON TAP)** Where 1 is very poor and 5 is very good, how would you rate 'On Tap'?

- 1. Very poor **GO TO Q23**
- 2. Poor **GO TO Q23**
- 3. Average **GO TO Q23**
- 4. Good **GO TO Q23**
- 5. Very good **GO TO Q23**
- 6. Don't know **DO NOT READ GO TO Q23**

Q19. **ASK ALL.**

- **IF Q22=1 or 2 [VERY POOR OR POOR] ASK:** Why have you rated 'On Tap' as poor? How can it improve? **PROBE FULLY**

OPEN RESPONSE

- **IF Q22=3 or 4 or 5 or 6 ASK:** Why have you rated as 'Average'/'Good'/'Very good'/'Don't know'?

OPEN RESPONSE

- 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 Review and Forward Work Programme, Social media updates such as Twitter.*)

Q20. How likely are you to take notice of the following types of communication from CCWater, if it's on a subject of relevance to you?

	1. Not at all likely	2. Not likely	3. Neither / nor	4. Likely	5. Very likely	(Don't know)
Stakeholder update emails	<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"/>
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 Review and Forward Work Programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social media updates such as Twitter, LinkedIn and Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q21. Have you visited the CCWater website at all in the past year?

- Yes
- No

Q22. **IF Q25= 1 (YES)** How often have you visited the CCWater website in the past year?

- Once a week or more frequently
 - Less than once a week but at least once a month
 - Less than once a month but at least once in the last three months
 - Less frequently than once in the last three months
 - Can't remember
- IF APPROPRIATE** As a stakeholder, what do you think of CCWater's website? (**PROBE for: Ease of use? Relevant content and information? Look and feel?**)

Q23. ASK THOSE WHO HAVE VISITED THE WEBSITE AT Q25=1

And using the scale where 1 is very poor and 5 is very good, how would you rate each of the following aspects of the website?

READ STATEMENTS AND SCALE IF REQUIRED

	1. Very poor	2. Poor	3. Average	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"/>

- In what ways could CCWater improve the website?
- Can you give an example of a similar type of organisation which has a website you like the look/feel of?

Q24. What CCWater projects or activities, aimed at consumers, are you or your organisation aware of?

DO NOT READ – SPONTANEOUS RESPONSE - MULTICODE

	Q28. Spontaneous CODE INTO LIST
Helping consumers to use water more wisely	<input type="checkbox"/>
Promoting the benefits of tap water	<input type="checkbox"/>
Promoting support and assistance for customers struggling to afford their water bill	<input type="checkbox"/>
Informing consumers about their rights and responsibilities	<input type="checkbox"/>
Working with companies to tackle the root causes of customer complaints	<input type="checkbox"/>
Speaking up for and informing customers	<input type="checkbox"/>
Providing a strong voice for customers during the price-setting process	<input type="checkbox"/>
Sewer blockages – what not to flush down the toilet	
Providing consumers with advice about how to protect their water pipes during cold weather	
Other – please specify	<input type="checkbox"/>
None/Don't know	<input type="checkbox"/>

Q25. Have you heard of any of the following projects and activities, aimed at consumers? **READ THOSE NOT SPECIFIED AT Q28, BUT IF ALL EXCEPT "NONE/DON'T KNOW/OTHER" ARE TICKED AT Q28 SKIP TO Q30**

	Q29 Prompted READ LIST
Helping consumers to use water more wisely	<input type="checkbox"/>
Promoting the benefits of tap water	<input type="checkbox"/>
Promoting support and assistance for customers struggling to afford their water bill	<input type="checkbox"/>
Informing consumers about their rights and responsibilities	<input type="checkbox"/>
Working with companies to tackle the root causes of customer complaints	<input type="checkbox"/>
Speaking up for and informing customers	<input type="checkbox"/>
Providing a strong voice for customers during the price-setting process	<input type="checkbox"/>
Sewer blockages – what not to flush down the toilet	<input type="checkbox"/>
Providing consumers with advice about how to protect their water pipes during cold weather	<input type="checkbox"/>
None/Don't know	<input type="checkbox"/>

Q26. Did you know that CCWater regularly publishes consumer research reports and company data on their website?

1. Yes Go to Q31
2. No Go to Q33

Q27. **SKIP IF Q30=2 ELSE ASK** Are you aware of any reports recently published by CCWater, either by name or by subject matter?

DO NOT READ – SPONTANEOUS RESPONSE – MULTICODE. SELECT CODE IF EITHER THE TITLE OF THE REPORT OR THE SUBJECT MATTER IN BRACKETS IS MENTIONED

	Q31 Spontaneous CODE INTO LIST
'Delving into Water 2016: Performance of the water companies in England and Wales 2011-12 to 2015-16' (water company performance data)	<input type="checkbox"/>
'Beneath the Surface: Customers' Experiences of Universal Metering'	<input type="checkbox"/>
'Testing the Waters: Business customers' views on their water and sewerage services 2016' (non-household/business customer satisfaction tracking)	<input type="checkbox"/>
'Open for Business: Lessons for the non-household retail water market in England based on customer experiences in Scotland' (views on non-household/business competition)	<input type="checkbox"/>
'Attitudes to tap water and using water wisely'	<input type="checkbox"/>
'Delivering Affordability Assistance to water customers: cross-sector lessons' (affordability of water bills)	<input type="checkbox"/>
'Water Matters: Household customers' views on their water and sewerage services 2015' (household customer satisfaction tracking)	<input type="checkbox"/>
'Floating the idea': household customers' views on water market reform in England (household views on competition)	<input type="checkbox"/>
Other – please specify	<input type="checkbox"/>
None/Don't know	<input type="checkbox"/>

Q28. **SKIP IF Q30=2 ELSE ASK** CCWater has published a range of reports on a variety of subject areas. Have you heard of any of CCWater's reports on the following subject areas? **READ THOSE NOT SPECIFIED AT Q31**

	Q31 Spontaneous CODE INTO LIST
Water company performance data	<input type="checkbox"/>
Customers' Experiences of Universal Metering	<input type="checkbox"/>
Non-Household Customer satisfaction tracking	<input type="checkbox"/>
Views on non-household competition	<input type="checkbox"/>
Attitudes to tap water and using water wisely	<input type="checkbox"/>
Affordability of water bills	<input type="checkbox"/>
Household customer satisfaction tracking	<input type="checkbox"/>
Household views on competition	<input type="checkbox"/>
None/Don't know	<input type="checkbox"/>

Q29. **SKIP IF Q30=1 ELSE ASK** Recent reports on the website include Water company performance data, Household and Non Household Customer satisfaction tracking, Customers' experiences of Universal metering, Household and Non-household competition, Affordability of water bills and Attitudes to tap water and using water wisely. Are reports like this of interest to you?

1. Yes
2. No **GO TO Q30**

Q30. **SKIP IF Q30=1 AND SKIP IF Q33=1 (YES)** What kind of reports would be of interest to you?
OPEN REPONSE

Q31. CCWater's draft Forward Work Programme was recently sent out for consultation. Were you aware of this?

1. Yes
2. No
3. Don't know

- **IF YES:** Have you looked at this document?
- **IF RECEIVED BUT NOT LOOKED:** Do you intend to look at it?
- **IF NO:** Why not?

Q32. Do you or does your organisation usually respond to the Forward Work Programme consultation?

1. Yes
2. No
3. Don't know/Unsure

Q33. **IF Q36= 2** Can you tell me why your organisation doesn't usually respond to the Forward Work Programme consultation? **DO NOT READ - MULTICODE AS APPROPRIATE**

1. Not relevant to our organisation
2. No time to respond
3. Didn't have response to make
4. Other, specify
5. Don't know/Unsure

Q34. 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? **READ EACH STATEMENT**

	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"/>
I can easily access complaint information when I need it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **PROBE most negative and positive responses:** Why do you agree/disagree that [INSERT]?
- 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 (50)

Q35. On average, how often do you personally deal with CCWater? **SINGLE CODE INTO BELOW – DO NOT READ**

1. Once a week or more
 2. Once or twice a month
 3. Once every two or three months
 4. Once every four to six months
 5. Once a year
 6. Less often
 7. Never
 8. Don't know
- 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 past 6 months, roughly how many people have you dealt with at CCWater?

Q36. **IF Q35 = "NEVER" OR "DON'T KNOW" SKIP TO Q38** Do you deal with regional or national level CCWater staff, or both? **MULTICODE – PROMPT TO CLARIFY IF REQUIRED**

1. Regional – England
2. Regional - Wales
3. National - England
4. National - Wales
5. Don't know

Q37. Where 1 is Very Poor and 5 is Very Good, how would you rate the contact you have had with.... **[ASK FOR THOSE SELECTED AT Q40]**

	1. Very poor	2. Poor	3. Average	4. Good	5. Very good	(Don't know)
Regional - England staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regional - Wales staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National – England staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National – Wales staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **IF APPROPRIATE:** Is there anything that CCWater could do to help improve your relationship with [INSERT] staff?

Q38. How would you (or your organisation) prefer to engage with CCWater? **READ LIST - MULTI CODE**

1. Face-to-face
2. Telephone
3. Letter
4. Email
5. Website
6. Stakeholder event
7. Social media
8. Other (please specify)
9. Don't know **DO NOT READ – NOT WITH ANY OTHER CODE**

- 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?
- Would you say CCWater are dealing with the right person/people at your organisation?

Section 6: Overall satisfaction with CCWater 5 mins (55)

Q39. 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**.

0. Extremely dissatisfied
- 1.
- 2.
- 3.
- 4.
5. Neither/nor
- 6.
- 7.
- 8.
- 9.
10. Extremely satisfied
11. Don't know

- Why have you given a rating of [INSERT]?

Q40. Overall, how important is it to you to have an organisation with CCWater's role?
READ LIST SINGLE CODE

1. Not essential
2. Not important
3. Important
4. Essential
5. Don't know **DO NOT READ**

- Why do you say that?
- What one thing could CCWater do to improve their relationship with you?

Final thoughts 5 mins (60)

Q41. We are now almost at the end of the discussion, do you have any final comments to make regarding your relationship with CCWater, its activities or strategic aims?

PROBE FULLY

Q42. **ASK IF Q10=1 [IF CCWATER NOT AT ALL EFFECTIVE IN ROLE AS CONSUMER ADVOCATE] OR IF Q14=1 [PERFORMANCE DECLINED A LOT] OR Q43=0 or 1 or 2 [EXTREMELY DISSATISFIED OVERALL]**

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

1. Yes
2. No **GO TO Q45**

Q43. **IF Q46=1 Yes:** Are you happy for us to pass your contact details on to CCWater and ask them to contact you directly.

1. Yes
2. No

Q44. **IF Q47=1 Yes** Can you briefly tell me what your concerns are so we can pass them onto CCWater before they contact you?

Interview note respondent's concerns to pass to CCWater

2. No specific concern to pass on or do not wish to say

Q45. **IF Q47=2 No** As you do not wish for us to pass on your contact details, CCWater will not be in touch to discuss your concerns.

Q46. FOR PILOT ONLY SKIP IF MAIN STAGE [NO RECORDING REQUIRED AT MAIN STAGE]

CCWater would like to listen to some of the interviews to gain a sense of what people are saying and check how the interviews are being conducted. Do you give permission for your recording to be passed to CCWater? Please note, depending on what you have said in the interview, they may be able to identify who you are.

1. Yes, I give my permission to pass on the recording
2. No, I do not give my permission to pass on the recording

Q47. We really appreciate the time that you have given us today. Would you be willing to be contacted again for clarification purposes or be invited to take part in other related research for CCWater?

1. Yes, for both clarification and further related research
2. Yes, for clarification only
3. Yes, for further research only
4. No

Q48. IF Q33=1 (YES) You mentioned earlier that the consumer research reports and company data on the website would be of interest. Just to confirm, these are available at:
<http://www.ccwater.org.uk/blog/category/reports/>

Wrap and Close

Thank you very much.

I mentioned at the beginning of the interview that all of your responses will be treated in complete confidence in line with Market Research Society guidelines, unless you give your permission for them to be attributed to you. Are you happy for the answers that you gave me today to be directly attributed to you? If you are not happy for them to be attributed to you I can confirm that they will remain confidential and will only be used in grouped format for analysis purposes or if we use any quotes in the report, they will be anonymous. **SINGLE CODE**

1. Yes, I am happy for my answers to be attributed to me and directly passed back to CCWater
2. No, keep my answers anonymous

Can I also ask whether you would be happy to be contacted again to take part in other research for CCWater?

1. Yes
2. No

APPENDIX E

Recommendations concerning fieldwork process

Below are some notes to consider for any future waves of the stakeholder research.

- The CCWater stakeholder database contains a number of contact details for people within the same organisation. When sending out invitations to take part in the research, it is advisable to split up these multiple contacts into two (or more) batches to avoid overloading an organisation
- A facility to re-send the invitation is useful as this was often requested by stakeholders
- A number of stakeholders liaised by email to make arrangements for the interview. Having a dedicated email account set-up for the purpose is advisable
- Care must be taken when dialling contacts from the same organisation who have the same 'switchboard' number/same 'gatekeeper' to avoid overdialling. It is important to be aware of such numbers in advance of fieldwork and take steps to dial economically. Strategies Accent adopted include grouping together such names/contact numbers and being aware of all the contact responses (telephone and email) from an organisation to ensure a seamless approach
- Primary stakeholders were asked a range of 'quantitative' questions to increase the overall data size. It is advisable to highlight the key questions which do require asking as sometimes stakeholder prefer to talk more 'freely' rather than responding to these types of questions
- It is useful to prepare a 'paper' version of the questionnaire so this can easily be supplied if requested.

CONSUMER COUNCIL FOR

CYNGOR DEFNYDDWYR



The Consumer Council for Water

1st Floor, Victoria Square House, Victoria Square, Birmingham B2 4AJ

Visit our website: www.ccwater.org.uk

Follow us @WaterWatchdog

Contact: Liz Cotton, Research Manager