

WaterVoice Window 2

Summary Report

April 2020



The voice for water consumers
Y corff sy'n rhoi llais i ddefnyddwyr dŵr

‘Ask your water company a question’

‘Communicating CCW’s role’

‘Help us to shape innovation in water’

Introducing WaterVoice

This report presents findings generated via WaterVoice, CCW's online community of more than 600 water bill payers aged 18+ across England and Wales, recruited and managed by Ipsos MORI. The activities included in this report were conducted over a period of around one month.

Members of the community were recruited from existing online panels, aiming for representation across all water companies, targeting a balance by gender, age groups and tenure. It is important to note that the profile of community members participating in each individual activity **may not be reflective** of the overall community composition, or the population of bill payers.

WaterVoice has been designed to provide a flexible forum for ongoing conversations with a large group of consumers, allowing for basic surveys, qualitative and deliberative inquiry, meeting the need for fast feedback and a sounding board to pre-test ideas and initiatives. As such, it will complement rather than substitute for slower turn-around, more rigorous ad hoc research projects commissioned by CCW.

Because WaterVoice's consumers are not representative in a statistical way, the findings presented here are **descriptive** and **illustrative**, and **cannot be extrapolated** to all consumers. It is also important to recognise that not all WaterVoice members have taken part in each activity, and that throughout the course of the programme of research activities they will likely have become **more informed**, potentially affecting their views.

We recommend any sharing of findings generated by exercises run via WaterVoice is accompanied by a similar note, aiding interpretation and use.



Window 2 activities

1

'Ask your water company a question'

9 – 19 Mar

2

'Communicating CCW's role'

3 – 8 Apr

3

'Help us to shape innovation in water'

8 – 15 Apr

Window 2: Activity types and functionality

‘Ask your water company a question’: forum

- **Open forum** – the moderator posed information and instructions to participants, sparking conversation and responses over a period of around ten days.
- **‘Open group’** – participants could see others’ responses.
- **‘Like’ function** – participants were asked to read each other’s posts and click ‘like’ to indicate that they would also like to ask these questions to their water company, before adding up to two new questions of their own.

‘Communicating CCW’s role’ and ‘Help us to shape innovation in water’: sequential board

- **Questions grouped into topics** and posed to participants in a sequential manner – each topic appears after completing the previous.
- **‘Hidden visibility’** – participants could not see others’ responses.
- **‘Markerboard’** function used for Communicating CCW’s Role, allowing participants to annotate the graphic by dropping pins with comments for ‘likes’, ‘dislikes’ and ‘suggested improvements’.
- **Closed questions** (response codes provided) and **open-ended questions** (participants invited to type their response).

Ask your water company a question

Activity aims & questions asked

For this activity, customers of water companies in London and the South East were invited to ask their water company questions on the subject of demand management and water resources.

An open forum was used, allowing members to see others' responses and comment. Members were invited to 'like' questions (posed by others) that they would also like to ask their water company, and to pose up to two new questions of their own.

CCW passed the questions to water companies, and the responses were shared with members invited to take part.

Customers of the following water companies were invited to the forum:

- Southern Water Services Ltd.
- Sutton and East Surrey Water
- Thames Water Utilities Ltd.
- South East Water Plc
- Portsmouth Water Plc
- Affinity Water (Affinity Water Central, Affinity Water East, and Affinity Water South East).



Questions asked by *WaterVoice* members

Tell us the questions you'd like to ask to your water company about what they are doing to make sure there is enough water for everyone, for now and for the future.

Members asked questions relating to the following topics:

- The **processing** of water, chemical composition and testing for the effects on consumers.
- The **hardness** of water as a cause of concern, whether water softener is added to drinking water and whether 'hard' water is safe to drink.
- Opportunities for customer involvement in **measures to save water**, and potential opportunities for water saving incentives (e.g. 'visible water meters' which show 'live' water consumption).
- How individual customers – and society – can help **prevent a hosepipe ban**.
- Plans for **future demand management**, including building more reservoirs or forms of rainwater storage, in the context of depleting groundwater resources, a growing population and the effects of climate change.
- The process for **managing and repairing leaks**.
- What companies are doing to **reduce the cost of water** for customers on water meters.
- The **impact of compulsory water meter installations** on household water use.
- **Supply** of water and sewerage by different companies in the same area.

Communicating CCW's role

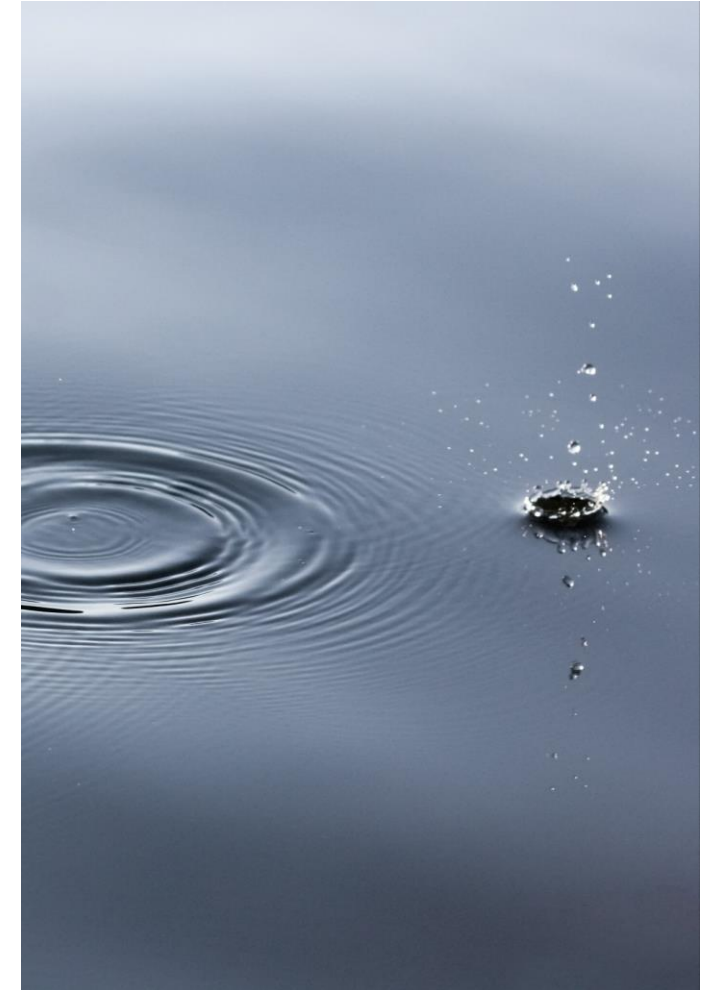
Activity aims & questions asked

This activity used a sequential board with a markerboard function to gather members' feedback on CCW's graphic which presents CCW's role and what it does.

The aim was to gather feedback to compare how well the graphic communicates CCW's role with how well it is communicated on the website, and to find out where the graphic might be best 'housed' on the CCW website.

Questions were structured in four sequential blocks as follows:

- **Finding out about CCW's role:** views about CCW's role and whether the CCW website makes this clear (before the graphic was presented).
- **Impressions of the graphic:** views on the graphic, how well it communicates CCW's role and how helpful it is.
- **Markerboard activity of the graphic:** participants were asked to annotate what they liked and disliked about the graphic, with any suggestions for improvement.
- **Where the graphic should go:** views on how the graphic compares to CCW's website, plus whether and where it should appear on it.



Finding out about CCW's role from its website

How clear is it what CCW does?

- Most participants said it is mostly or very **clear what CCW does** after visiting the CCW website (32/36 *very/mostly clear*, 20 *very clear*).

Did you find out anything about CCW's role and what it does that you did not already know before looking at the website?

- Many found new information about CCW's role (some said they knew nothing at all before visiting the website), including:
 - That CCW produces **research** on water companies.
 - That the advice and support CCW provides is **free**.
 - The possibility of making **complaints or enquiries** to water service companies.
- Some did not find out anything new, but this may be because they had visited the CCW website for a previous activity.

Please tell us what you think CCW's role is, and what it does

- The most common responses were that CCW:
 - Provides **free advice** and **information** for consumers.
 - Oversees **water industry standards**.
 - Helps consumers with **issues** and **complaints**.
 - Conducts and publishes **research**.
- One participant was unclear about how CCW's role differs from that of water companies and Ofwat.

“ I understand that CCW as a body helps to sort what ever issue that I have concerning how I use water as a customer.”

“ I... was impressed with how simply [the website] was laid out. The only reason I could envisage using the site was if I had an unsatisfactory response to a complaint from my supplier and I wished to take it further and the CCW site indicates the process very clearly.”

Impressions of the CCW graphic

How well does the graphic communicate what CCW does?

- Nearly everyone said the graphic **communicates what CCW does well**, more than half of whom said it does this **very well** (23/24 very/fairly well, 15 very well).
- Participants described it as **easy to understand, clear and concise**.



How helpful is in the information?

- Nearly all participants found the information **helpful** with **very helpful** the most common response (23/24 very/fairly helpful, 16 very helpful).
- They explained that the graphic covers all the ways CCW can help consumers.

“ I really like how the graphic gives you the main 8 things the CCW focuses on and their simple and quick descriptions.”

“ It is helpful because it answers your questions or redirects you to where you should go.”

“ [It is] very easy to understand, very straight to the point.”

Impressions of the CCW graphic

Suggested improvements & ideas

- A few participants said that the graphic needed **more explanation** on some of the points.
- One suggestion was for the graphic to explain the step-by-step process of getting help and support from CCW; others were to add further explanation for each tile, and link each element to further information on the website.



“If you click on these squares does it take you to another page with a more in-depth description?”

“If this can be backed up with evidence then it is helpful. The site links to each of the elements in the graphic should correspond to the relevant icon images.”

“Impartiality is great - how can you demonstrate this?”

“... I am not entirely sure what each graphic actually means – what [do] the company actually do for me and why should I be interested in working closely with them? The statements made are general and could cover a multitude of different activities which may or may not apply to my situation.”

Impressions of the CCW graphic

Annotating the graphic



Where should the graphic go?

How does the graphic compare to what is on website already?

- A little over half said the graphic and website explain what CCW does **equally well**, (11/17), with nearly equal numbers saying each is better than the other (3 *website better*, 4 *graphic better*).

“Graphics [are] always helpful for people who have communication difficulties and everyone recognises symbols and [it] makes it easier to understand.”

Should it go on the website?

- Nearly everyone (19/20) said the graphic **should go on the website**.
- They felt the graphic would provide a quick overview, with further detail on the website if needed.

“... sometimes people don't want lots of writing to read through... anyone wanting more info can read through text.”

Where on the website should it go?

- Most said it should appear **in addition** to text available at www.ccwater.org.uk/aboutus/ (15/20).
- However, in open-ended responses, 7 participants mentioned it should **appear on the homepage**. Suggestions included adding it as an information box at the top of the homepage, or via a 'click here for an easy to view guide' link.

“... would be a good addition to the about us page, especially as that is fairly wordy and this is a bright, clear graphic.”

“... should be on the home page, so customers can see it at first glance and do not need to take any steps to identify and search for what CCW do.”

Activity insights

- Both the graphic and the website were **well received** – there is **no clear ‘winner’** in terms of which is thought to best explain CCW’s role.
- Both forms of information were clear, helpful and easy to understand, echoing findings from previous *WaterVoice* activities which have sought feedback on CCW’s website (‘Exploring CCW online’) and an information leaflet about making complaints (‘Your right to complain’).
- Positive aspects of the graphic’s design are its **simple layout and colour scheme**. Participants also valued particular aspects of its content – knowing about **impartiality, representation and authority** is reassuring, and viewed positively.
- Potential improvements to the graphic include **greater clarity** or explanations of terms like “investigation”, “support” and “impartiality”. This might be achieved by using the graphic to **signpost** to more information by adding **links from the tiles to pages on the website offering this detail**.
- Nearly everyone felt the graphic should be housed on CCW’s website – this could offer **a useful choice between a quick overview** (via the graphic) and **more detail** (on the website) which might be particularly valuable for those who need the information broken down. Most (but not all) said it should appear **in addition to text available at www.ccwater.org.uk/aboutus/**. Those who thought it should appear on the homepage suggested adding it as an information box or via a link.

Communicating CCW's role: responses and key demographics

- **Invited to take part:** all registered community members.
- **Activity dates:** 3 – 8 April 2020.
- **Responses:** 36 members participated (20 responded to every question), representing 6% of *WaterVoice* members in Window Two.
- **Incentive:** prize draw entry for ten £20 Amazon vouchers.

Low base size: percentage figures should be treated as indicative only.

*Based on bill payers in England and Wales

**Based on number of participants as a percentage of all those taking part in this activity

	Quotas	% Population Incidence*	Number of participants	% participants**
Age	18-29	4%	2	6%
	30-44	19%	8	22%
	45-59	36%	18	50%
	60-74	27%	6	17%
	75+	14%	2	6%
Gender	Male	47%	17	47%
	Female	53%	19	53%
	In another way	-		
Tenure	Owner occupier	65%	28	78%
	Renter	35%	8	22%

Communicating CCW's role: responses by water company

Water Company	Number of participants	% participants
Affinity Water Central	1	3%
Affinity Water East	1	3%
Affinity Water South East	2	6%
Anglian Water Services Ltd	4	11%
Bournemouth Water Plc	0	0%
Bristol Water Plc	0	0%
Cambridge Water Company Plc	0	0%
Dŵr Cymru (Welsh Water)	4	11%
Essex & Suffolk Water	1	3%
Hafren Dyfrdwy	0	0%
Hartlepool Water Plc	0	0%
Northumbrian Water Ltd	1	3%
Portsmouth Water Plc	1	3%
SES Water Plc	0	0%
Severn Trent Water Ltd	4	11%
South East Water Plc	4	11%
South Staffs Water Plc	3	8%
South West Water Ltd	1	3%
Southern Water Services Ltd	2	6%
Thames Water Utilities Ltd	4	11%
United Utilities Water Plc	1	3%
Wessex Water Services Ltd	0	0%
Yorkshire Water Services Ltd	2	6%

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Help us to shape innovation in water

Activity aims & questions asked

This activity asked participants about their views, priorities and ideas about innovation in the water sector. It also asked about their views on an Ofwat proposed innovation fund and their expectations for timescales within which specific forms of innovation should achieve a positive impact.

Questions were structured into two sequential blocks as follows:

- **What does innovation mean to you?** An open text question to explore top of mind thoughts and understanding of the term 'innovation' in the context of the water sector.
- **Innovation Fund:** an introduction to the Innovation Fund as proposed by Ofwat, and a series of open and closed questions about:
 - perceived importance of, and expected timescales for, specific innovation ideas;
 - general support or opposition to the fund; and
 - further ideas and priorities for innovation in the water sector.

The findings from this activity will primarily be used to influence the design of the innovation fund which Ofwat has confirmed will go ahead.



Innovation in the water sector

Thinking about the water and waste water sector, what does the word 'innovation' mean to you?

- The most common interpretation was that innovation is about **finding new and better systems** for managing water and reducing waste, and delivering a better or more **efficient service**.
- Many referenced the future, and said innovation is about **keeping up with the times**, progress, and **moving forward with technology**. They also said that innovation does this by **thinking creatively** or 'outside the box'.
- Some shared their priorities for innovation in the water sector. The most strongly communicated priority was **saving water and reducing water waste**, and several participants specifically mentioned finding ways to **recycle waste water** for re-use at home, for agriculture or generally.
- Participants also wanted innovation to focus on **improving sustainability** and reducing environmental impact in the water sector.

“ *Finding new ways to do things that work better than the old ways. Solving problems that couldn't have been solved before, due to the availability of new equipment or techniques. Going back to first principles and coming up with new approaches, rather than 'the way it's always been done'.* ”

“ *Innovations can only come about if we change the way we think about how we relate to water. It has become a precious commodity across the globe so we need to recognise this in our thinking and how we use water for the benefit of all.* ”

“ *A company that is moving forward to improve services for the good of their customers but also working on ideas to help climate control.* ”

The Innovation Fund

Participants were introduced to the Innovation Fund being proposed by Ofwat. This will make £200 million available to companies through a competition, costing between £1.30 and £1.97 per customer per year. Customers were presented with the following innovation ideas which are discussed in the following slides:

Improvements to water and wastewater services (for example improvements to customer service, to drinking water quality or ways to reduce flooding from sewers).

Ways of taking less water from rivers and lakes, to help the natural environment.

Measures which prioritise reductions in water and wastewater bills.

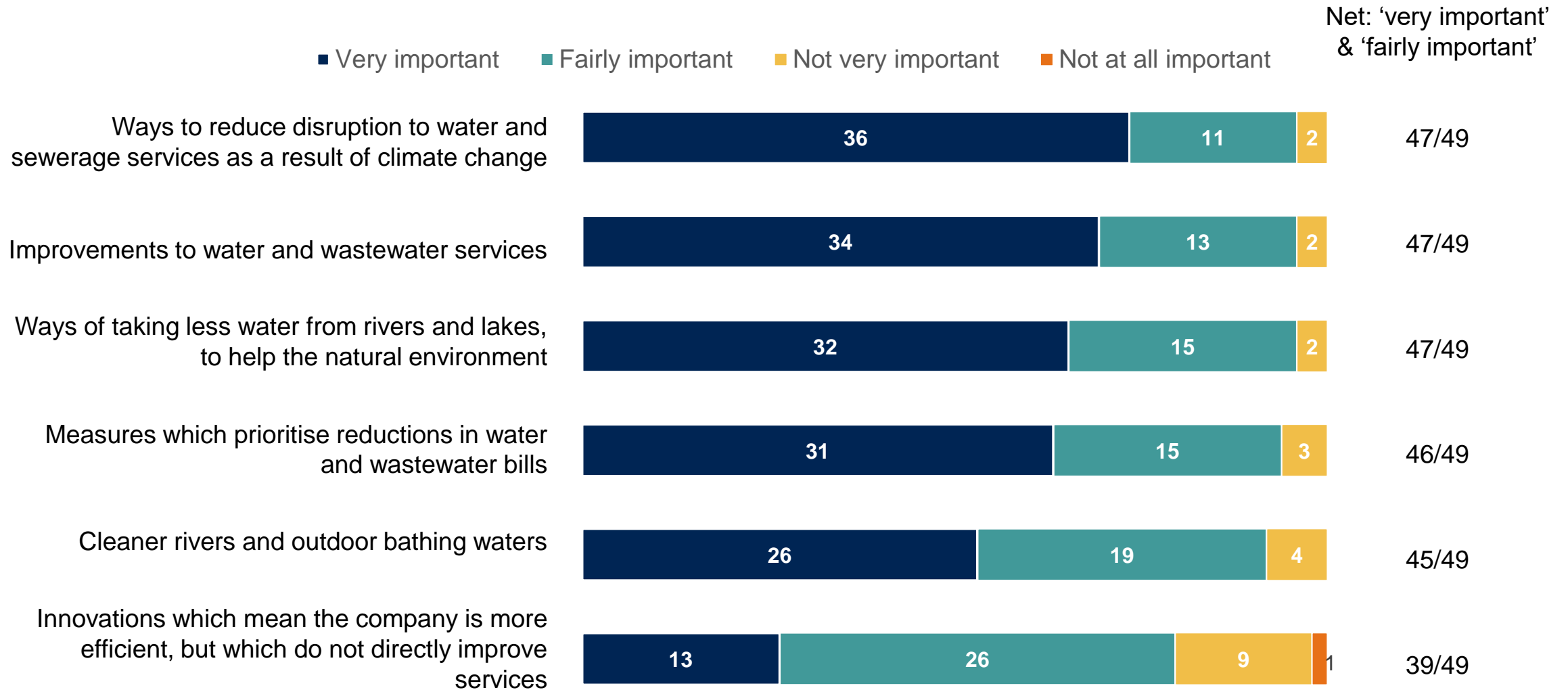
Innovations which mean the company is more efficient, but which do not directly improve services i.e. redesigning water meters so they have a longer lifespan.

Ways to avoid/reduce disruption to the supply of water and to sewerage services as a result of climate change.

Cleaner rivers and outdoor bathing waters.

Perceived importance of each innovation idea

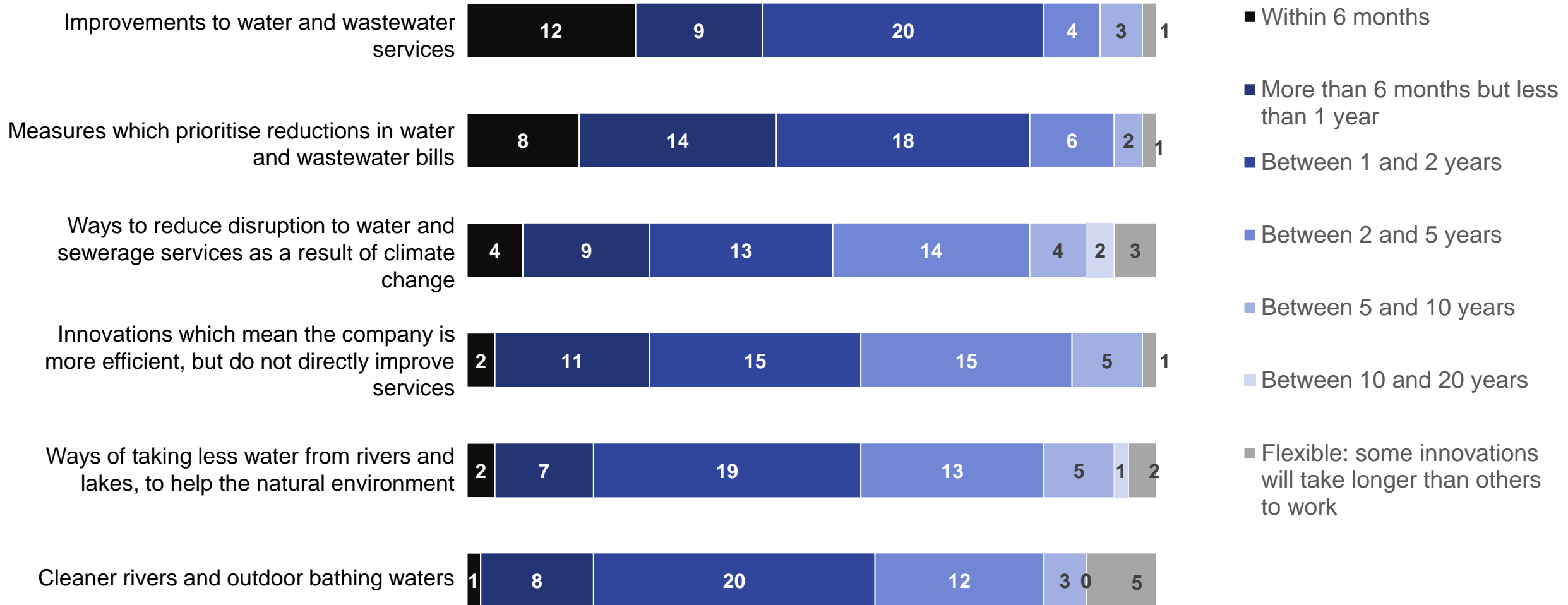
Most consider all of the ideas to be very or fairly important



Base: All participants (49) responding 8-15 April 2020. Figures (n) rather than percentages are presented due to the small base size.

Expected timescales for changes to be introduced

Most expect all the innovations to result in changes within five years



Base: All participants (49) responding 8-15 April 2020. Figures (n) rather than percentages are presented due to the small base size.

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Other ideas for what an innovation drive should achieve

- **Reducing household water usage** whilst limiting impact on lifestyle by: **improving efficiency** of water dispensing systems, installing systems that allow households **to re-use** their water, and **educating the public** on water use.
- Mitigating the **impacts of climate change and flooding** by keeping drains and sewers clear and finding ways to protect areas that are vulnerable to floods.
- Seeking **new ways to detect leaks** including finding new ways of detecting small leaks before they become larger.
- **Improving water quality** so that all households can access **soft water**, and detecting and addressing water pollution (including agricultural pesticides).
- **Improving customer service**, with better communication methods and more accurate bills.
- **A national water grid** for better distribution of excess water to places in the UK that need it, using “pumped storage hydro schemes”.
- Some had **concerns about using customers’ money for this**: they felt water companies must demonstrate that the fund has been effectively used, and argued that the **benefits gained must directly benefit the customers** who are funding it. A couple felt that the companies would profit from this fund, especially if they gain efficiency through the innovations, meaning that shareholders should pay instead.

Other ideas for what an innovation drive should achieve

New ways to detect leaks



Smart ways of detecting small leaks before they become large ones would be very important.”



Maintaining a good service through no leaks etc., and also proactively dealing with the effects of climate change.”



Reduction in water waste through leaking pipes... longer lasting piping [and better] communication with service users around aims, length of time and the expected result (and was it achieved).”

Hard water filtering



I think it's important to filter the water in general, especially the hard water areas, I use a jug filter but I think someone out there could come up with a way to sort this problem.”



Please ensure our water is fit to drink. We rely on bottled water... I have spent £80 on a machine to purify our water, which is simply unfair as our water rates are high and tap water is undrinkable.”

A national water grid



If Ofwat can levy £200 million by adding a small sum to consumer's bills for 'innovation' I'd prefer they... started to develop a 'National Grid' where shortages in one area are compensated by resources in other areas.”

Innovation that benefits customers



Given that this innovation fund seems to be funded by customers like me, I would prefer that the innovations that win are ones that offer a direct benefit to customers!”

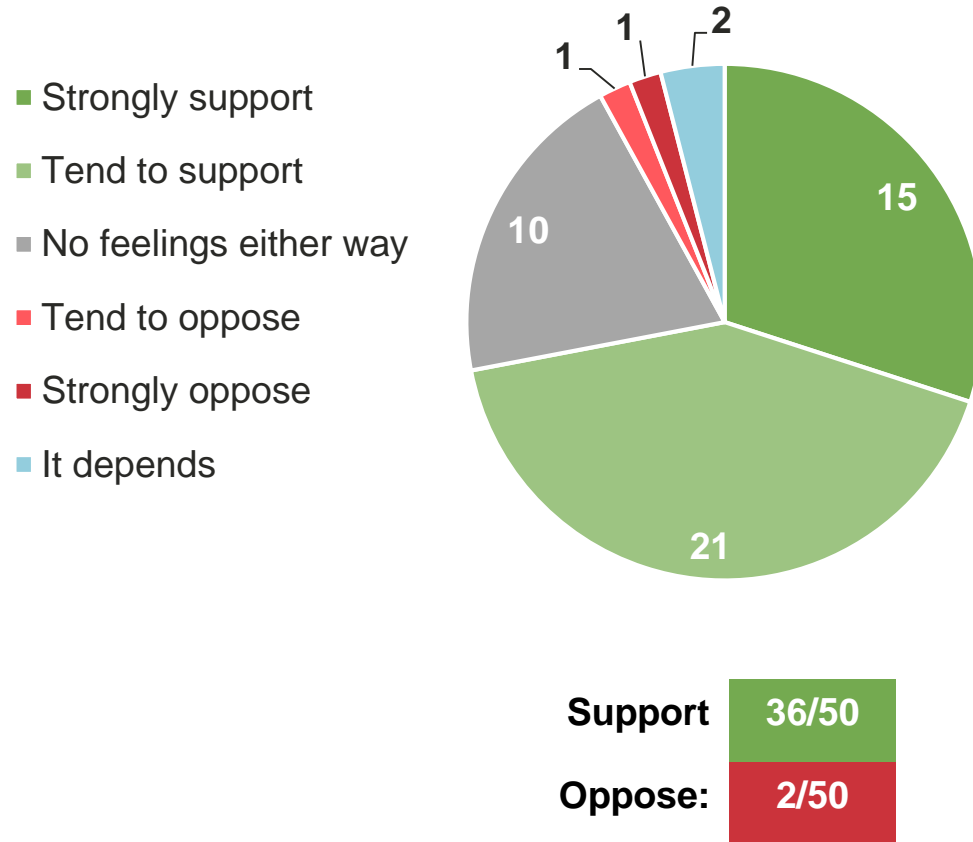


It is all very well expecting the consumer to pay for an 'Innovation Fund'... Water companies should have innovation as part of their basic ethos.”



I think it is an outrage that this is once again being funded by consumers who, after all, have no say in who they get water from. [Why can't] shareholders pay for these things?”

Support and opposition for the Innovation Fund



Three key themes:

Important for future demand, water quality, supply and the environment



I believe that it is worth supporting... as a result, we will have [cleaner water] and we will ensure a better environment for our future generations."



... [It will] improve the quality of the water and supply system and will make a huge difference to the environment."



Unfair burden on bill payers

We're paying enough for water bills and adding extra amount in bills because of [an] innovation fund doesn't seem justifiable. I think Ofwat should find other means to fund the innovation competition."



Need for results to be seen

I'd support it on the understanding that something would be seen reasonably quickly... If Ofwat's innovation means anything it needs to show results inside 6 years."

Base: All participants (50) responding 8-15 April 2020. Figures (n) rather than percentages are presented due to the small base size.

Activity insights

- Participants think innovation is about **finding better and more efficient ways** of delivering services, as well as **thinking creatively** to plan for the future in order to protect our water supply and environment. Some particularly want to see innovation achieve better water quality, reduce water waste, and a way of re-using waste water.
- Most consider all six innovation ideas to be important. Among these, consumers felt the *most* important were: reducing disruption to services as a result of climate change, improving water and wastewater services, and finding ways of taking less water from rivers and lakes, to help the natural environment. Responses and comments across this activity suggest they **may prefer innovation to balance the service they receive with its environmental impact** – improved services should not come at the expense of the environment.
- Most **expected to see results from all of the innovation ideas within five years**. Many expected improvements to water and wastewater services, and measures which prioritise bill reductions, within one year.
- More **support the Innovation Fund** overall (36/50), including 15 who *strongly* support it, than oppose it (and only 2 oppose it⁰. Some were neutral, or said ‘it depends’, explaining that they support the competition but feel it should be driven by Government or industry.
- Some participants felt that because the Innovation Fund would draw money from customer bills, water companies must focus efforts on ideas that directly benefit the customer (or at least reflect their priorities). It was felt that they must communicate how the money is being used and demonstrate tangible results within a few years.

Help us to shape innovation in water: responses and key demographics

Below (and throughout this report), here results do not sum to 100%, due to computer rounding and/or other response codes being available.

- **Invited to take part:** all registered community members.
- **Activity dates:** 8 – 15 April 2020.
- **Responses:** 90 members participated (47 responded to every question), representing 15% of *WaterVoice* members in Window Two.
- **Incentive:** prize draw entry for ten £20 Amazon vouchers.

Low base size: percentage figures should be treated as indicative only.

*Based on bill payers in England and Wales

**Based on number of participants as a percentage of all those taking part in this activity

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	60-74	27%	32	36%
	75+	14%	3	3%
Gender	Male	47%	42	47%
	Female	53%	48	53%
	In another way	-	0	0%
Tenure	Owner occupier	65%	63	70%
	Renter	35%	27	30%

Help us to shape innovation in water: responses by water company

Water Company	Number of participants	% participants
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Affinity Water East	4	4%
Affinity Water South East	5	6%
Anglian Water Services Ltd	6	7%
Bournemouth Water Plc	1	1%
Bristol Water Plc	1	1%
Cambridge Water Company Plc	2	2%
Dŵr Cymru (Welsh Water)	7	8%
Essex & Suffolk Water	2	2%
Hafren Dyfrdwy	0	0%
Hartlepool Water Plc	0	0%
Northumbrian Water Ltd	6	7%
Portsmouth Water Plc	1	1%
SES Water Plc	0	0%
Severn Trent Water Ltd	9	10%
South East Water Plc	7	8%
South Staffs Water Plc	2	2%
South West Water Ltd	6	7%
Southern Water Services Ltd	5	6%
Thames Water Utilities Ltd	5	6%
United Utilities Water Plc	8	9%
Wessex Water Services Ltd	6	7%
Yorkshire Water Services Ltd	4	4%

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