

WaterVoice Window 4

Summary Report

June 2020



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

**‘A glass half full or empty? Tell us
about your tap water!’**

**‘What does climate change mean
for the water industry?’**

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 4 activities

1

‘A glass half full or empty? Tell us about your tap water!’

21 May – 2 June

2

‘What does climate change mean for the water industry?’

20 May – 2 June

Both activities were **surveys** which included **closed questions** (response codes were provided) and **open-ended questions** (participants were invited to type in their response).

The surveys used routing, meaning some questions were asked to a filtered group of participants based on their responses to previous questions.

**A glass half full or empty?
Tell us about your tap
water!**

Activity aims & questions asked

This survey explored participants' views of the quality of the drinking water from their taps, and any actions they have taken to improve the taste of it.

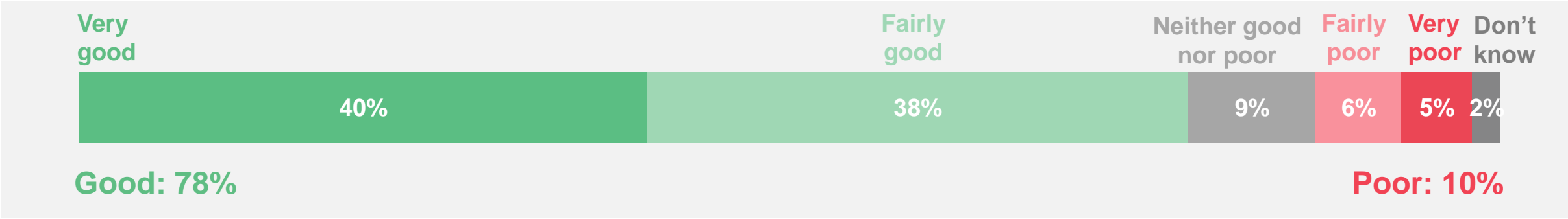
Participants were asked questions on the following topics:

- How they would rate the **quality of their drinking water at home**, and why.
- **Consumption of tap water vs bottled water**, and whether this has changed due to the coronavirus outbreak.
- Awareness of the **'Refill' scheme** and use of **refillable water bottles**.
- **Contact made to water companies** regarding tap water quality, including how the water company responded and satisfaction with the response.
- Actions taken to **improve the taste of drinking water** from taps at home, and the effectiveness of these measures.
- Views on whether **water companies should do more to improve the taste** of tap water.



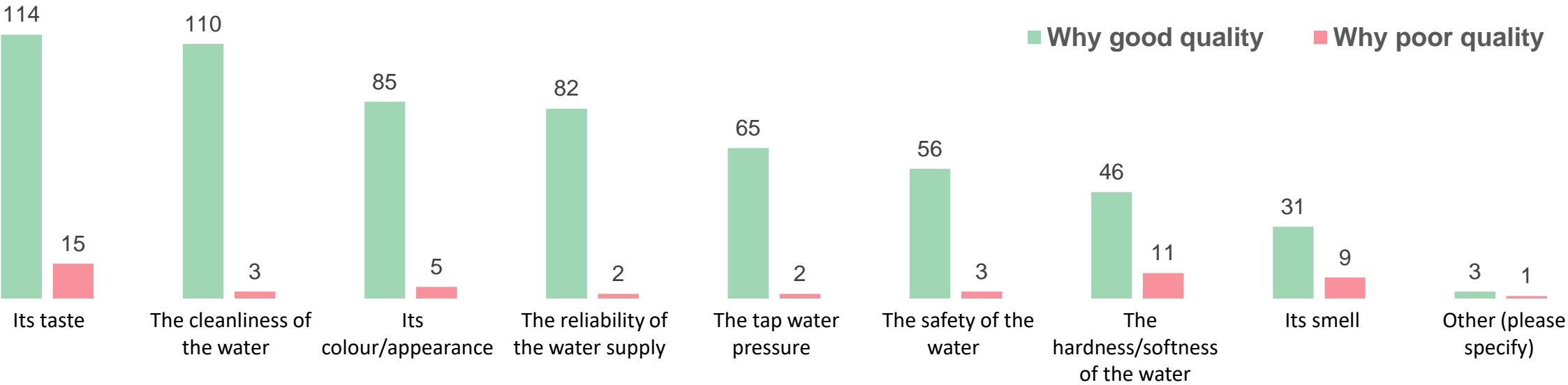
Ratings of drinking water quality

On balance, how would you rate the quality of the drinking water that comes from your taps at home?



Base: All who had contacted their water company (26). Figures (n) rather than percentages are presented due to the small base size.

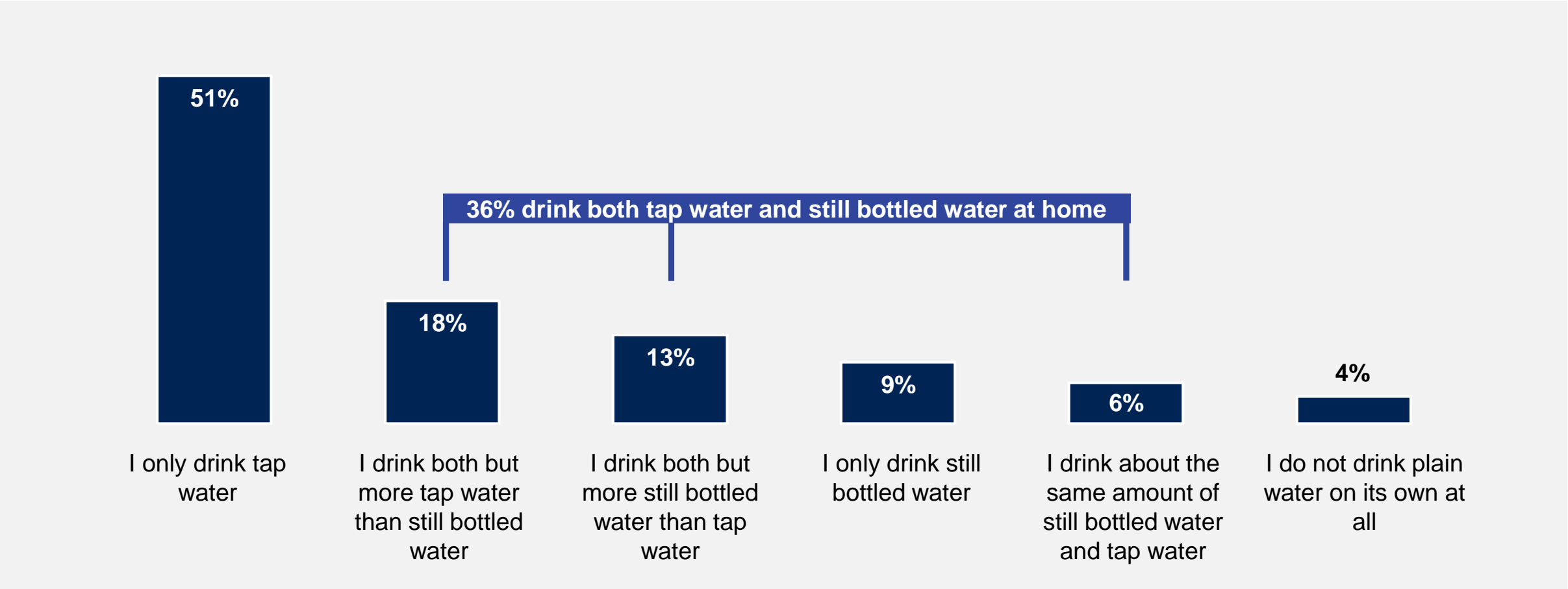
What makes you say this about the drinking water that comes from your taps at home?



6 Base: All participants responding 21 May – 2 June 2020 (194); and all participants who rated their drinking water quality as ‘very good’/‘fairly good’ (152) and ‘fairly poor’/‘very poor’ (20) in the previous question – figures (n) rather than percentages are presented due to the small base size. %s and combinations e.g. ‘good’ might not sum to 100%/the sum of their constituent figures (very good + fairly good) due to rounding.

Consumption of tap water and still bottled water

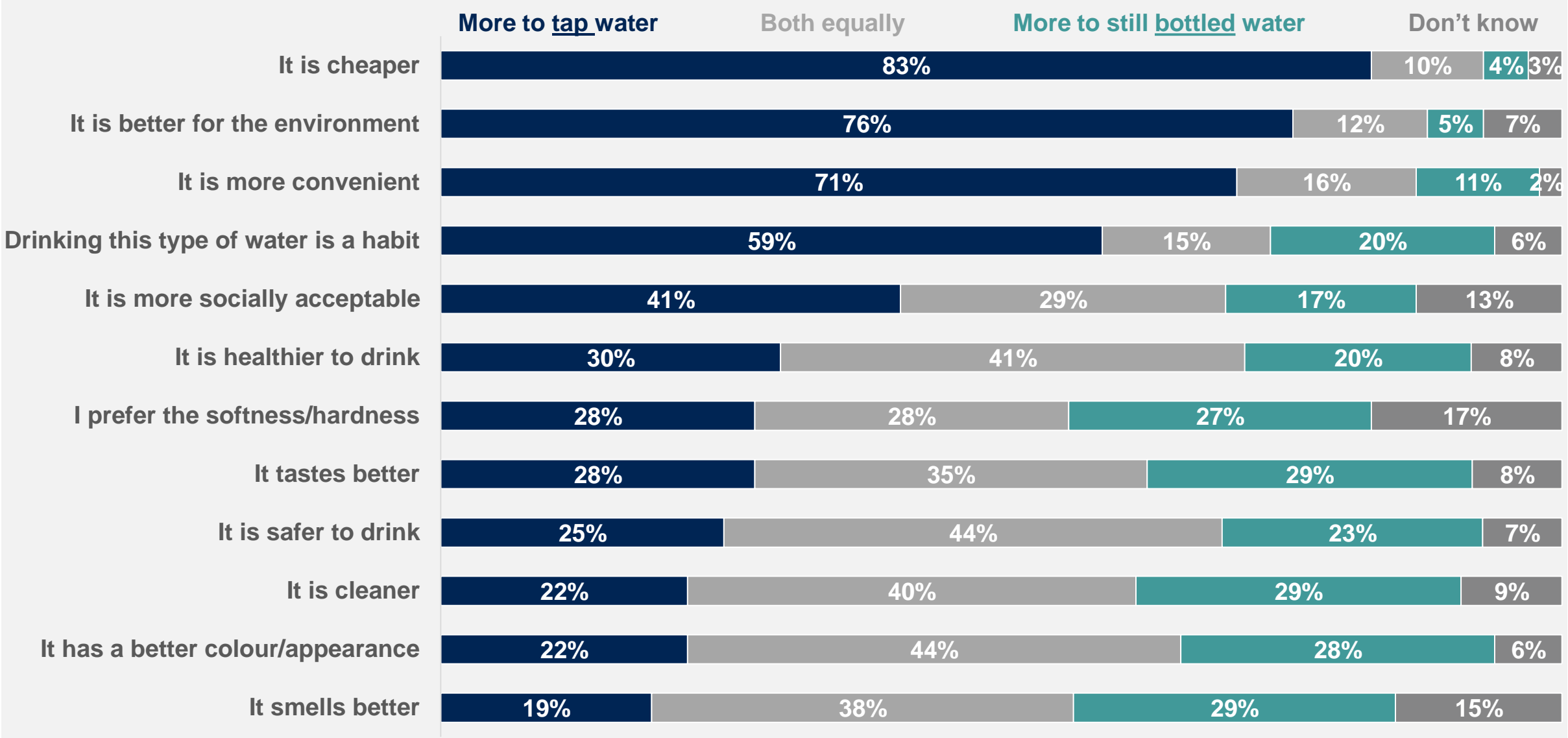
Thinking about the water you drink when you are at home nowadays, which of the following best describes what you do personally?



Base: All participants responding 21 May – 2 June 2020 (192).

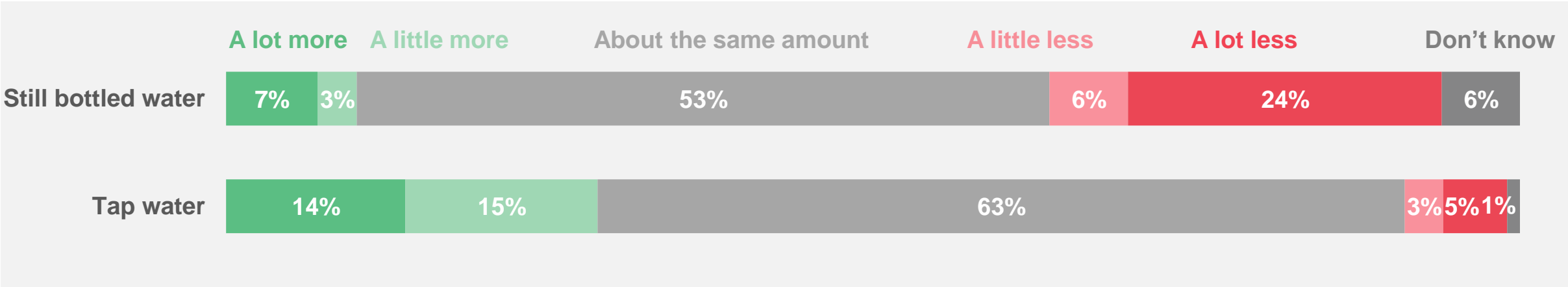
Comparing tap water and bottled water

Do you think each of the following applies more to tap water, to still bottled water, or to both equally?



Impact of Covid-19 on water drinking behaviour

Would you say that compared to the period before the coronavirus outbreak, nowadays you are personally drinking more, less or about the same amount of...



Please explain your answer:

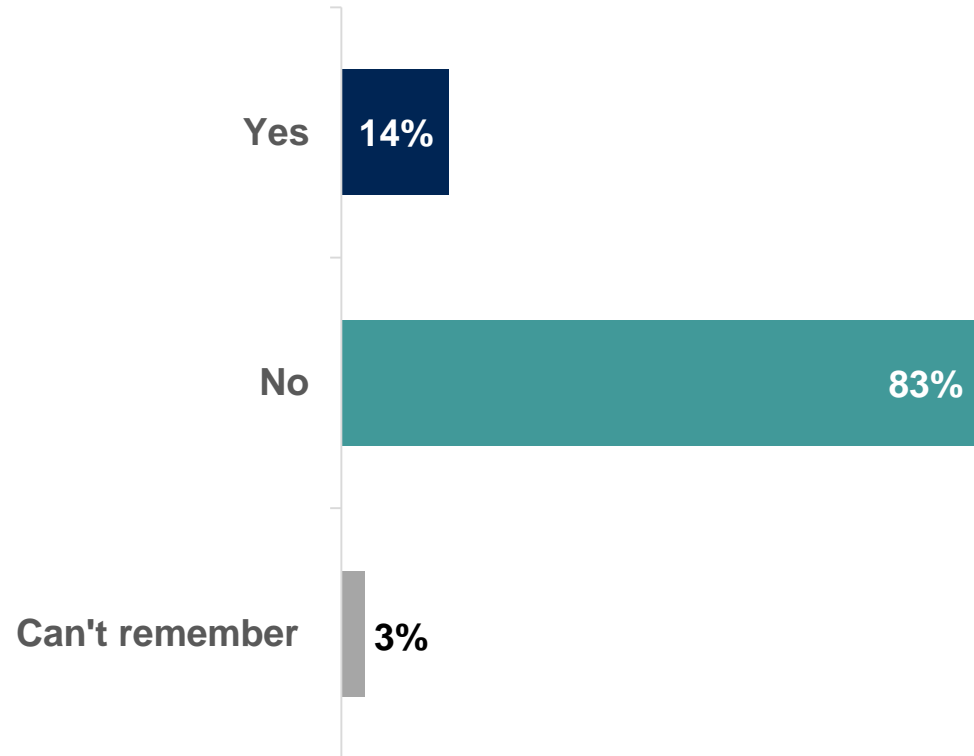
- 51% say they only drank tap water prior to the pandemic – for many participants this remains unchanged, and they drink the same amount of tap water as before.
- Participants who are drinking more tap water (and less bottled water) explained they are not going to grocery shops as often to buy bottled water; they are avoiding queues for bottled water; they no longer need bottled water ‘on the go’ as they are going out less; and they are less willing to spend money on bottled water.
- Participants who are drinking more bottled water mentioned not liking tap water, poor tap water quality, and drinking more water in general due to warmer weather.

“ I drink very little bottled water anyway and have been drinking only tap water since I've been at home for the lockdown as I have not wanted to buy bottled water on top of everything else.”

“ As I am home much more, and because the weather is in our favour, I am drinking a lot more water than I would usually at this time of year. The bottled water is much clearer and smells much better than plain tap water.”

Contacting water companies about water quality

Have you ever contacted your water company with a query about the appearance, taste, smell or safety of the drinking water from your taps at home?



What was the query about?

- Nearly all queries were about the **colour, taste, and smell** of tap water.
- The most common query related to **cloudy** or **discoloured** tap water.

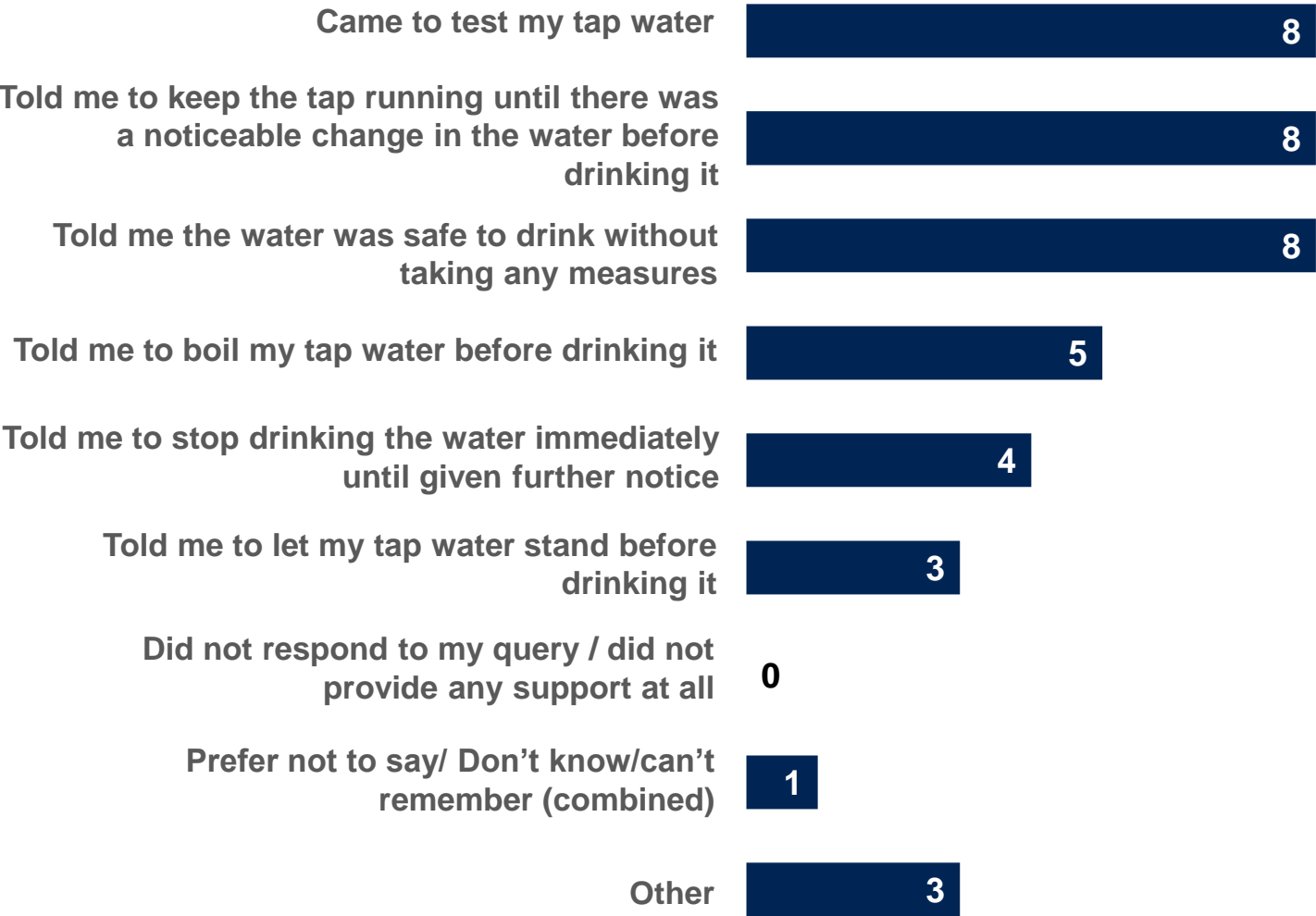
“It was **very cloudy**. **White and a strong smell**, they explained they had been working on line, and if I ran the tap for a little while it would stop. I tried and after about 5 minutes it cleared.”

“On the particular occasion the water changed to a **misty, mucky colour**, we were told it was due to a burst main.”

“Why the water pops in the kettle, and the **metallic smell and taste**.”

Complaints and queries about water quality

How did your water company respond to your query?



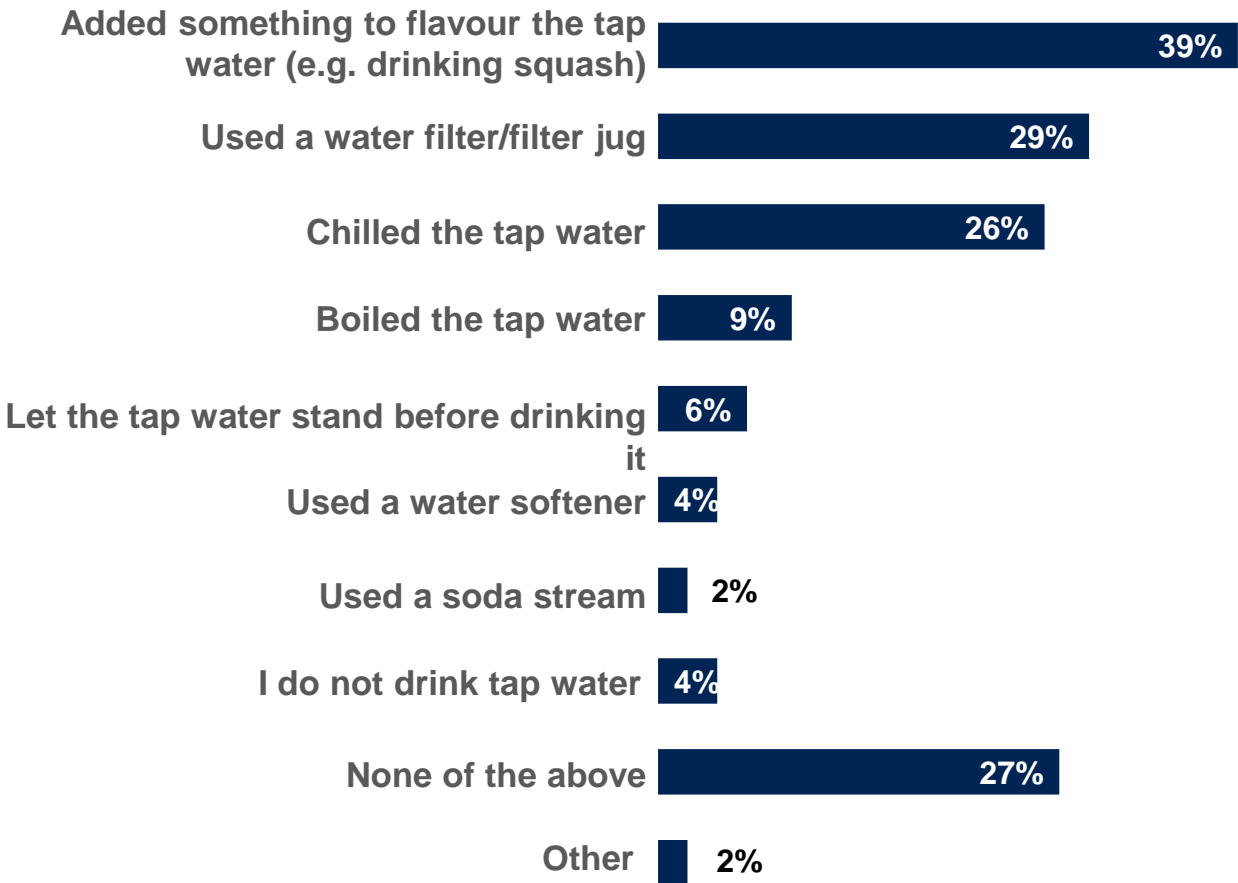
Views of how well the water company dealt with the query

- Over half of those who had contacted their water company said they **received the advice, help or support they needed** to resolve the query (15/26 said 'yes', 10/26 said 'no').
- Overall satisfaction with how water companies dealt with the query** was mixed: half were satisfied, but some were not (13/26 very/fairly satisfied, 10/26 very/fairly dissatisfied).

Base: All who had contacted their water company (26). Figures (n) rather than percentages are presented due to the small base size.

Improving the taste of drinking water

Which of the following, if any, have you ever personally done to improve the taste of the drinking water from your taps?



For each of the things you have done to improve the taste of the water from your taps, please tell us how effective this was.

- Participants found **adding squash or cordial** effective at improving the flavour of tap water.
- Some found **water filters/filter jugs effective** at improving water flavour, but mentioned they had stopped using them because they found them **expensive, slow, or a hassle to use**.

“ I started using a filter jug system which improved the taste of the water but was also too much hassle.”

“ The filter jug works well; I can happily drink tap water on its own if it's been filtered. Our water is so hard it has tattoos, piercings and a mohawk! However, filtered, it's fine.”

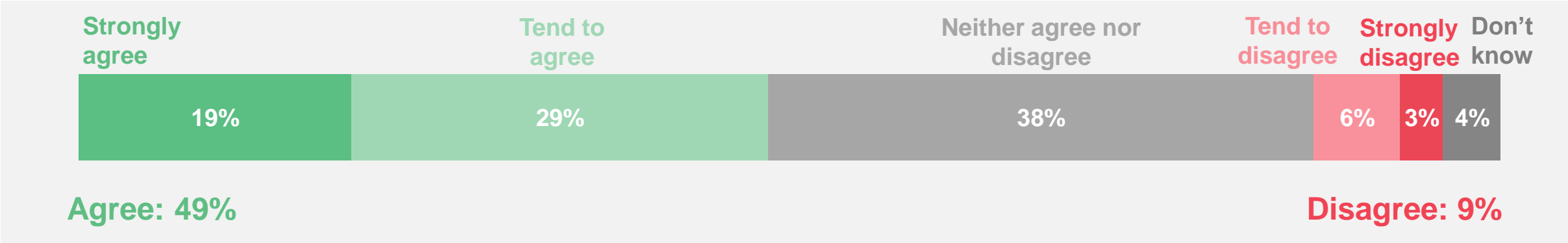
“ Tried using a soda stream and jug filter. I still cannot drink the water due to its after-taste but if a cordial is added then it is possible as it disguises the taste.”

Base: All participants responding 21 May – 2 June 2020 (187).

Improving the taste of drinking water

The taste of tap water may vary in different parts of the UK. This may be related to the geology of the area, the source of the water or the way it is processed. There is also variation in the way different people discern the taste of tap water. To what extent do you agree or disagree with the following statement?

Water companies should do more to improve the taste of the tap water their customers receive



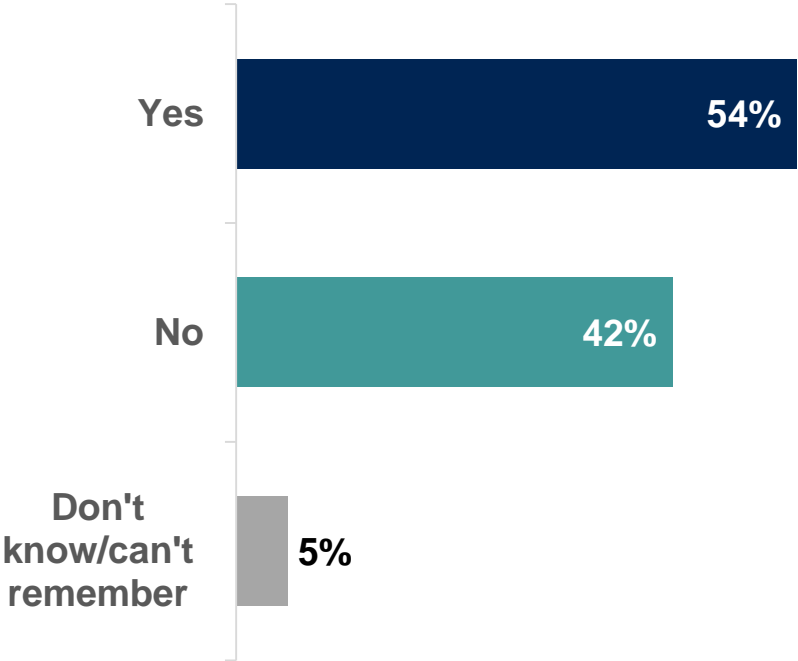
Q16: Please explain your answer:

- Participants who **agree**: some mentioned disliking the taste of their tap water, in particular that it was too hard or tasted of chlorine, and felt better tasting water would encourage people to drink less bottled water, with associated environmental benefits.
- Participants who **disagree**: tended to be happy with the taste of their own tap water; a couple of participants were worried that improving the taste in some way would involve the use of more chemicals, or higher water prices.
- Participants who **neither agree nor disagree** (or don't know) explained they were unsure what water companies could realistically do to improve the taste of tap water.

'Refill' scheme

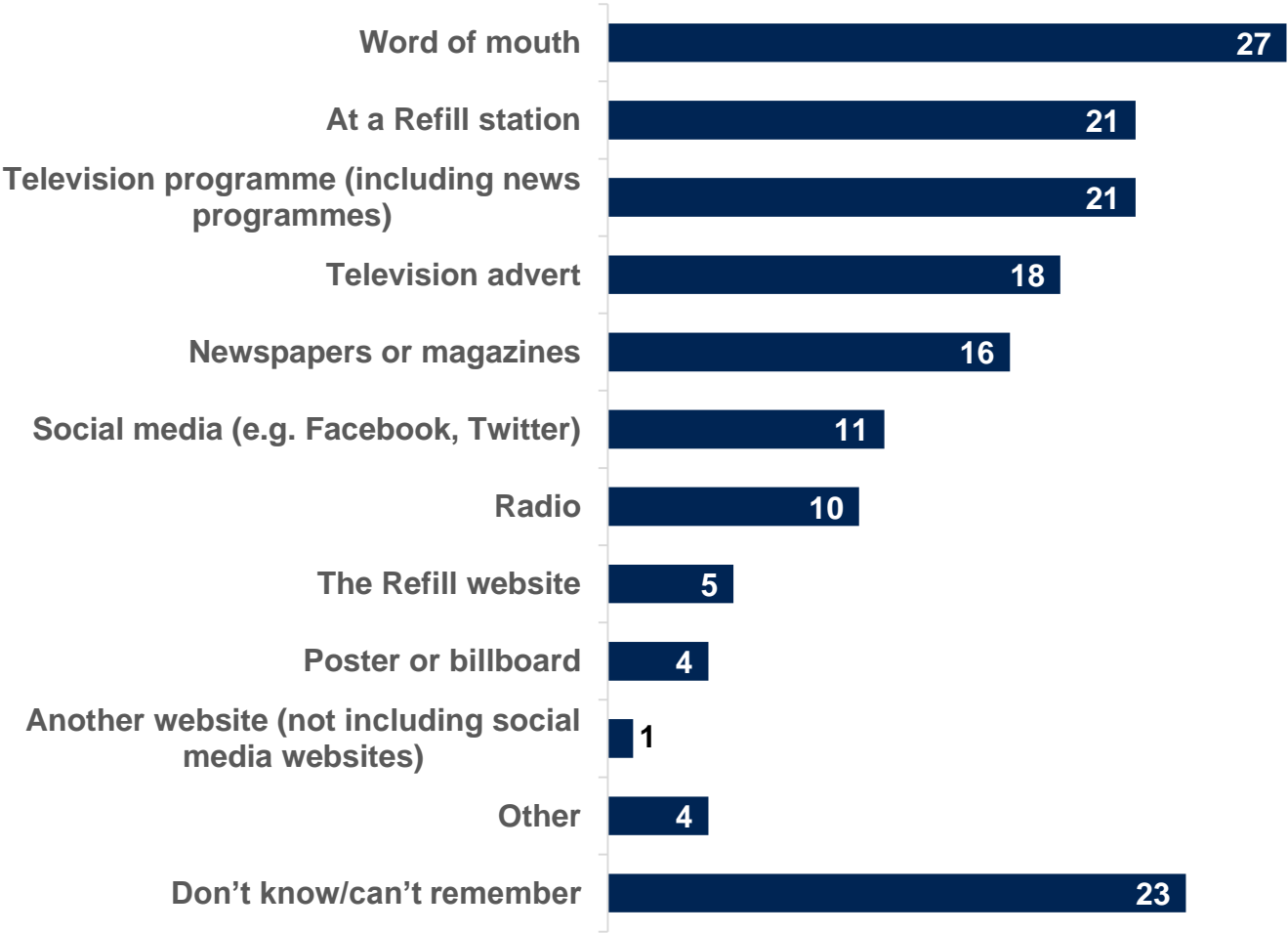
'Refill' is a nationwide scheme in the UK which provides a network of points offering free tap water to the public.

Before today, had you heard of the Refill scheme?



Base: All participants responding 21 May – 2 June 2020 (185).

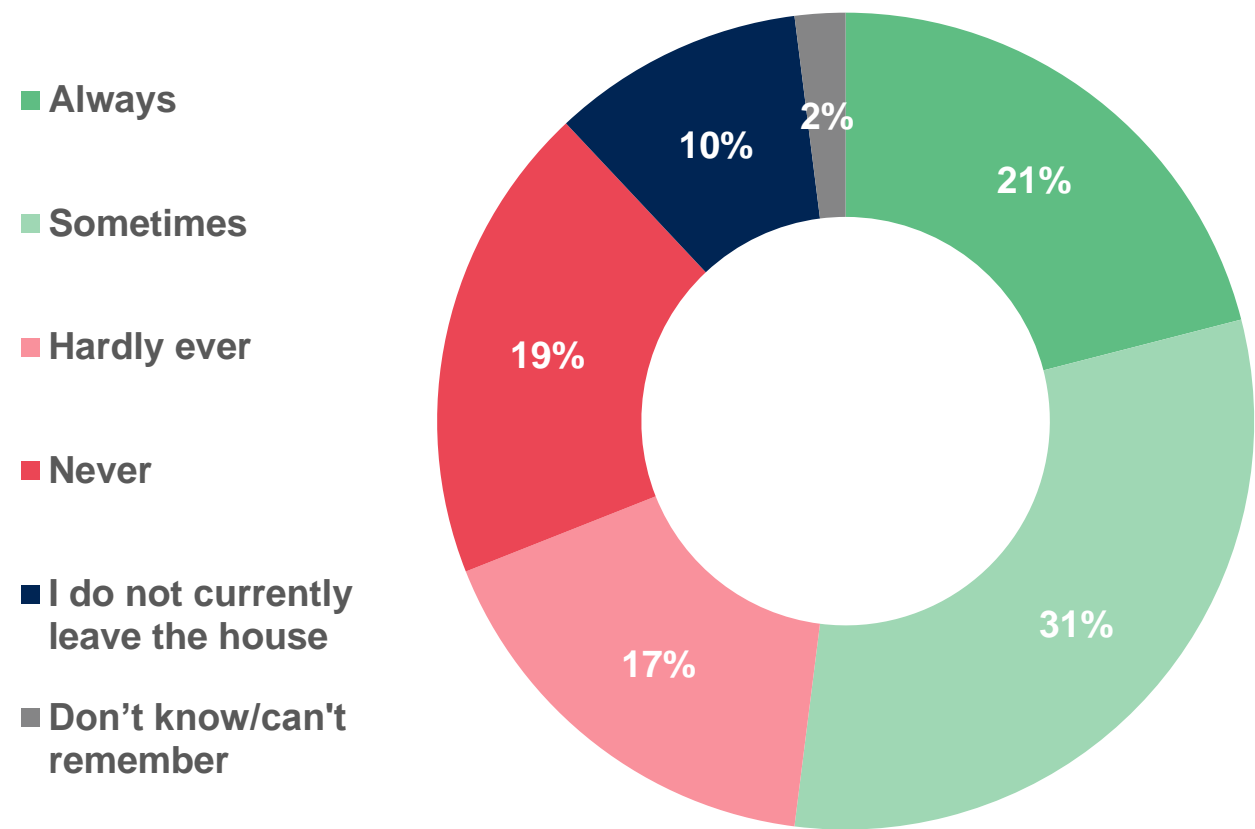
Where have you seen or heard about the Refill scheme?



Base: All participants who had heard of the Refill scheme (99). Figures (n) rather than percentages are presented due to the small base size.

Refillable water bottles

How often, if at all, do you personally carry a refillable water bottle with you outside the house?



Carry a refillable water bottle always/ sometimes: 52%

Carry a refillable water bottle hardly ever/ never: 36%

Why do you hardly ever/ never carry a refillable bottle with you outside the house?

Reasons given:

- Not being outside long enough to need one.
- Preferring to buy bottled water or drinks from cafés when outside.
- Difficulties finding taps to refill water bottles when out and about.
- It is a hassle.
- Not needing one in general / not being thirsty enough when outside.

Base: All participants responding 21 May – 2 June 2020 (185).

Base: All who hardly ever/never carry a refillable water bottle (66).

Activity insights

- Nearly four in five participants **(78%) rate the quality of the drinking water from their taps at home as (very or fairly) good**, while one in ten (11%) say it is poor. The **taste of tap water was the most common reason** for both good and poor ratings.
- **Drinking tap water is more common than drinking still bottled water at home, but over a third drink both.** Compared to bottled water, tap water is seen as being cheaper, better for the environment, more convenient, more of a habit and more socially acceptable. Meanwhile participants say still bottled water smells better, has a better colour/appearance and is cleaner than tap water (though large proportions say these apply to both, equally). Views were fairly mixed, however, on which tastes better, is better in terms of hardness/softness and is safer to drink.
- **Three in ten participants say they are drinking less still bottled water than before COVID-19**, with a similar number drinking more tap water (29%). Reasons include going to grocery shops less often, avoiding queues for bottled water, going out less in general and being less willing to pay for it.
- **One in seven (14%) have contacted their water company with a query** about their tap water. Nearly all queries were about the colour, taste, and smell of tap water, particularly cloudy or discoloured water. Over half received the advice, help or support they needed but not all were satisfied with how the water company dealt with the query.
- The **most common measure taken to improve the taste of tap water is adding something to flavour it – 39%** have tried this, and most found it effective. Twenty nine per cent have used a water filter/filter jug, but some found this too slow, expensive or too much of a hassle to continue doing.
- **Views are mixed as to whether water companies should do more to improve the taste of tap water** (49% agree with this statement), and agreement tends to be linked to whether or not participants like the taste of their own water at home. However, many were unsure what companies can be expected to do to improve the taste of their customers' water – a couple were concerned this might entail higher prices or the use of more chemicals.
- **Over half of participants always or sometimes carry a refillable bottle (52%).** The 36% who hardly ever or never carry one explain they either do not need one, prefer to buy drinks while out, find it difficult to refill while out or it is generally too much of a hassle. A similar proportion (54%) say they had heard of the Refill scheme, most commonly via word of mouth, a refill station, or on television.

Tell us about your tap water!: Responses and key demographics

- **Invited to take part:** all registered community members.
- **Activity dates:** 21 May – 2 June 2020.
- **Responses:** 194 members participated, representing 31% of *WaterVoice* members in Window Four.
- **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%	4	2%
	30-44	19%	36	19%
	45-59	36%	73	38%
	60-74	27%	69	36%
	75+	14%	12	6%
Gender	Male	47%	85	44%
	Female	53%	109	56%
	In another way	-	-	-
Tenure	Owner occupier	65%	142	73%
	Renter	35%	52	27%

Tell us about your tap water!: Responses by water company

Water Company	Number of participants	% participants
Affinity Water Central	5	3%
Affinity Water East	11	6%
Affinity Water South East	6	3%
Anglian Water Services Ltd	16	8%
Bournemouth Water Plc	3	2%
Bristol Water Plc	4	2%
Cambridge Water Company Plc	1	1%
Dŵr Cymru (Welsh Water)	14	7%
Essex & Suffolk Water	11	6%
Hafren Dyfrdwy	1	1%
Hartlepool Water Plc	1	1%
Northumbrian Water Ltd	13	7%
Portsmouth Water Plc	3	2%
SES Water Plc	1	1%
Severn Trent Water Ltd	12	6%
South East Water Plc	15	8%
South Staffs Water Plc	8	4%
South West Water Ltd	7	4%
Southern Water Services Ltd	14	7%
Thames Water Utilities Ltd	11	6%
United Utilities Water Plc	11	6%
Wessex Water Services Ltd	10	5%
Yorkshire Water Services Ltd	16	8%

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

What does climate change mean for the water industry?

Activity aims & questions asked

This survey explored participants' views on climate change and its implications for the water industry.

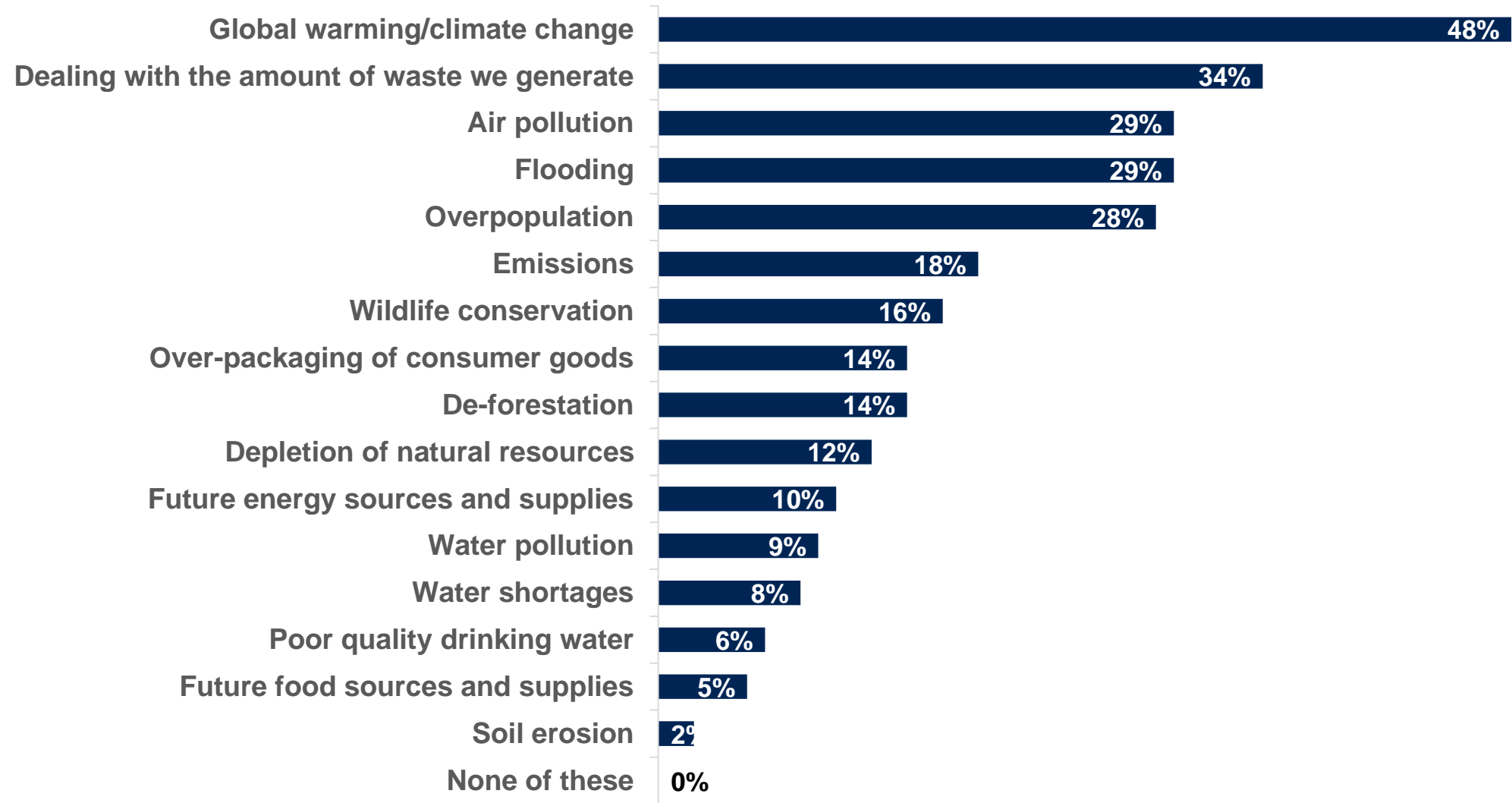
Participants were asked questions on the following topics:

- The **most important environmental issues** facing Britain today.
- The **impact of climate change** on the UK and on water companies, including expectations of the impacts of climate change on specific aspects of water supply over the next ten years.
- How **water companies may impact climate change** in the way they supply water to customers.
- Estimations of the **percentage of the UK's carbon emissions** that water companies are responsible for.
- How **consumers can help reduce the contribution of water companies** to climate change, and awareness of any **existing measures taken by water companies**.
- Views on the UK's '**net zero**' target and confidence it will be met by water companies.
- Views on **who should take responsibility for reducing carbon emissions** related to water and its supply.



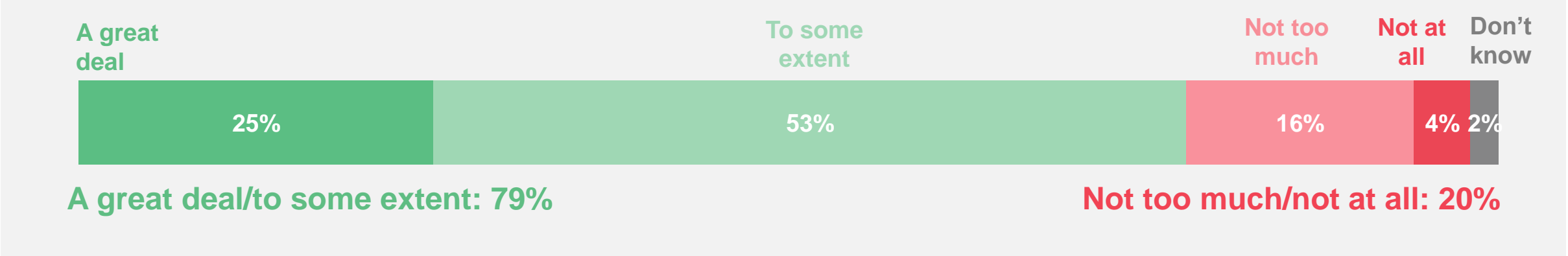
Environmental issues facing Britain

In your view, what are the two or three most important environmental issues facing Britain today?

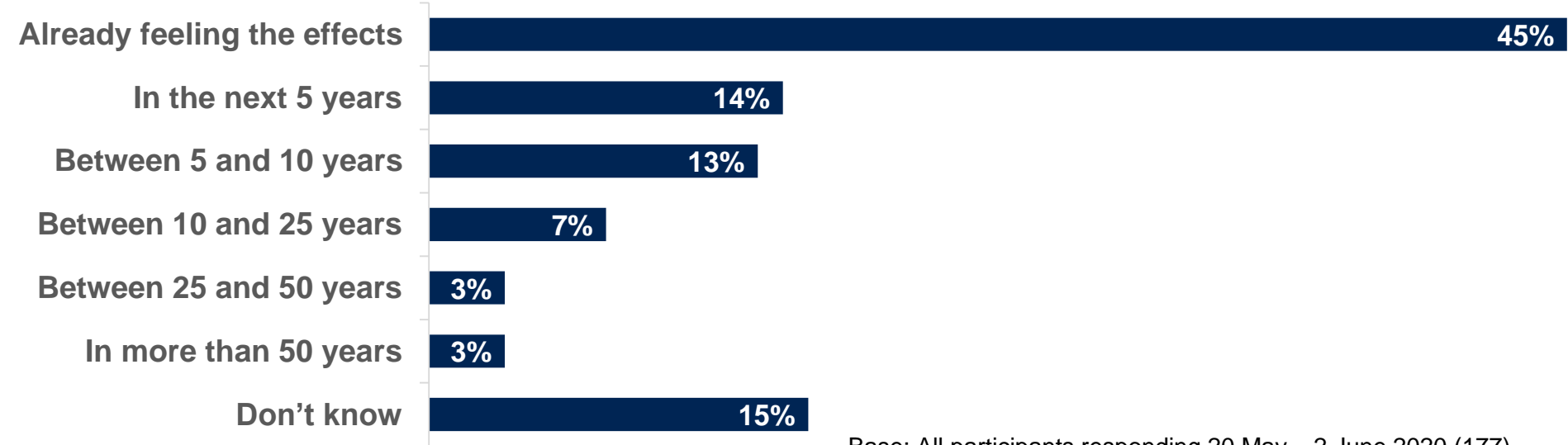


Environmental issues facing Britain

How much, if at all, do you think climate change is currently affecting people in the UK as a whole?



Q3: When, if at all, do you think UK water companies will start feeling the effects of climate change?



Base: All participants responding 20 May – 2 June 2020 (177).
%s and combinations e.g. 'a great deal/to some extent' might not sum to 100%/the sum of constituent figures due to rounding.

The relationship between climate change and water supply

How if at all, might **climate change** have an impact on **the ways water companies supply water to consumers in the future?**

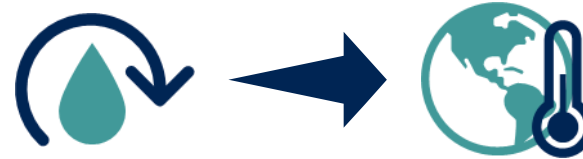


Responses (to this open question) highlighted:

- Greater water shortages due to less rain
- Greater demand for water for commercial and household use
- Limits on water supply, e.g. hosepipe bans, water rationing
- Higher water prices
- Increased flooding
- Increased pollution causing a reduction in water quality.

“There will be less water in summer months, leading to possible water restrictions, and more flash floods in winter months.”

And how, if at all, might **the way water companies supply water to consumers** impact on **climate change in the future?**



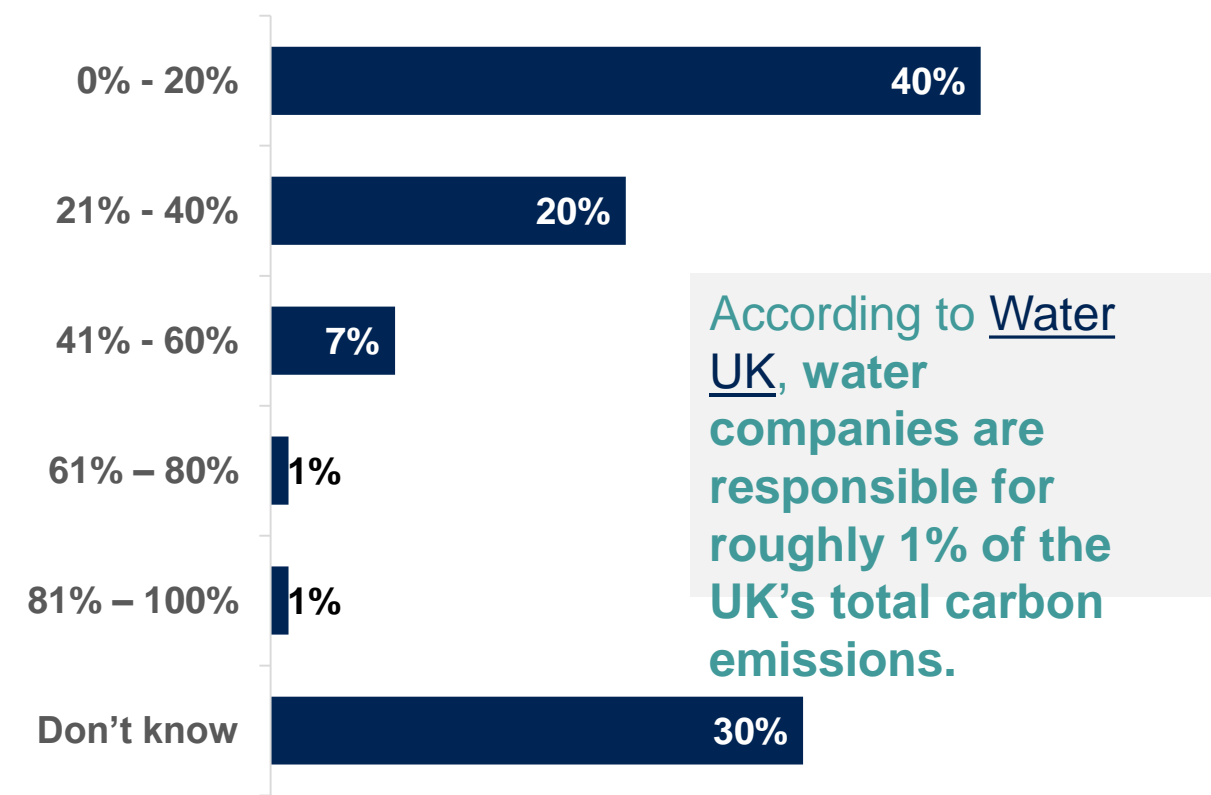
Participants were generally less sure about how water companies might impact climate change. One mentioned emissions from the water industry, but most tended to comment on what companies should do in *response*. Comments included:

- Future planning for droughts and better storage and management of water to maintain supply
- Improved piping to prevent leaks
- Restricted and reduced consumption, for example through raising awareness of water waste and installing water meters.

“Water companies should make sure that supplies are well managed to protect our water supply.”

Carbon emitted by UK water companies

What percentage of the UK's total carbon emissions do you think that the UK's water companies are responsible for?



Now that you've read this information, please tell us any thoughts you have about the percentage of the UK's total carbon emissions that UK water companies are responsible for.

“ I thought it would be much higher, so it is good to see it is not as high as I thought.”

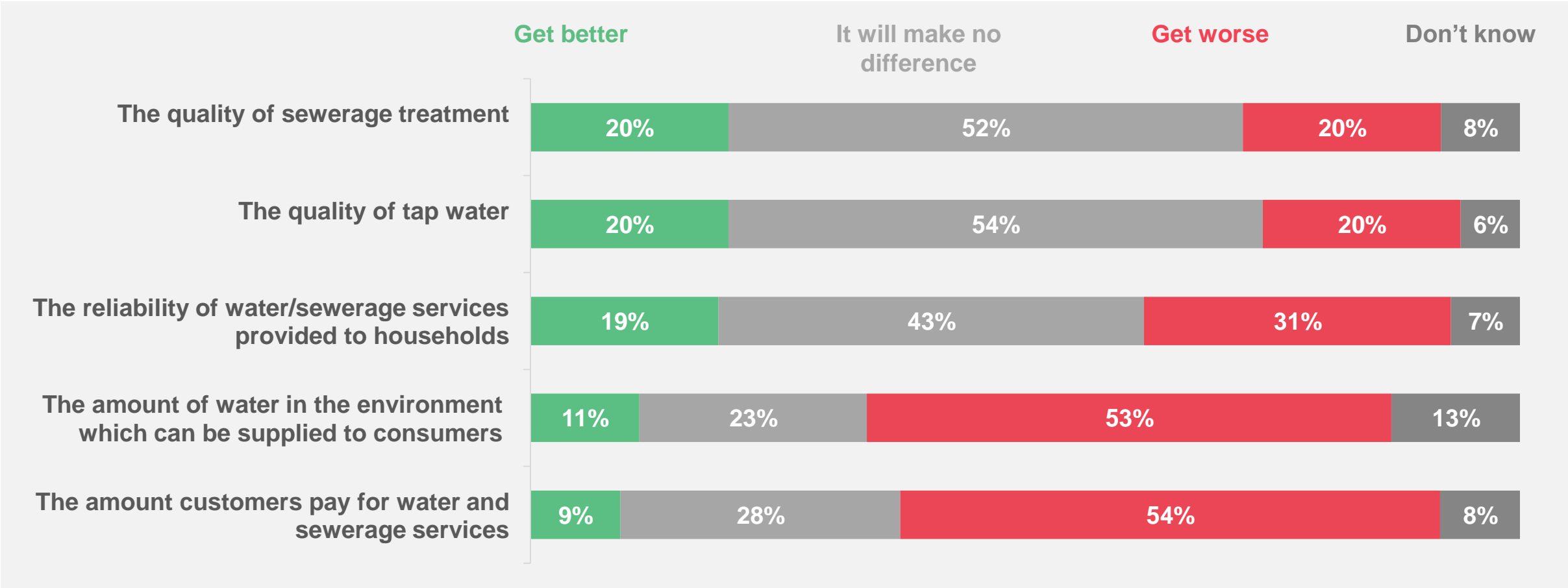
“ It's a low percentage but all emissions count and they should do as much as possible to reduce emissions.”

“ I don't care about water companies' carbon emissions. They need to concentrate on building a sustainable water network that captures water in reservoirs, rivers and aquifers, and ensure that flood management schemes work to divert excess water to reservoirs to maintain water stocks across the UK.”

Base: All participants responding 20 May – 2 June 2020 (168).

Climate change impacts on water services in the future

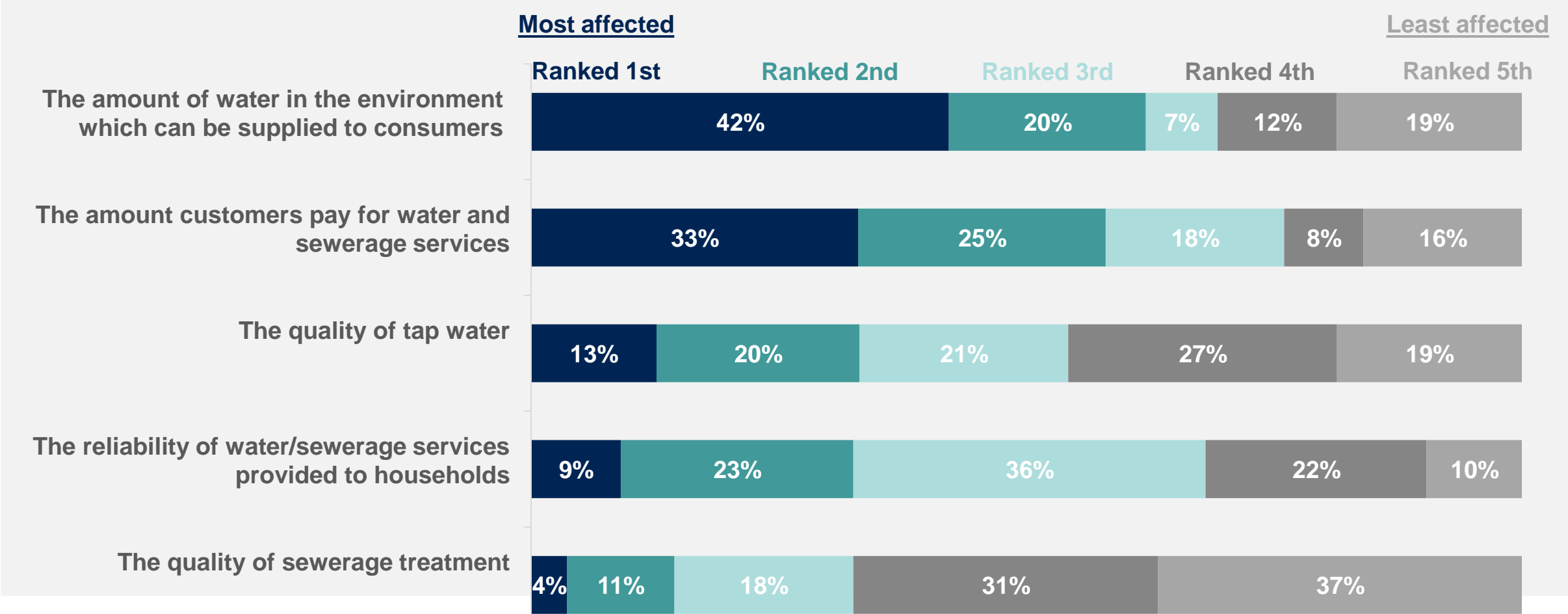
Over the next ten years, do you think that climate change will mean the following will get better, get worse, or will it make no difference?



Base: All participants responding 20 May – 2 June 2020 (167).

Climate change impacts on water services in the future

Please rank the following in the order that you think they will be affected by climate change over the next ten years, from most affected to least affected.



Base: All participants responding 20 May – 2 June 2020 (166).

Climate change impacts on water services in the future

Please tell us why you ranked the items in this order.

- Participants who think the **amount of available water** in the environment will be most affected by climate change explained this is likely to be due to **lower or variable rainfall levels**, **greater demand** and **hotter weather reducing the size of reservoirs**.
- Those who think the **amount consumers pay** will be the most affected by climate change tended to link this to **reduced supply** of water relative to demand. They anticipate this will mean water companies **increase prices** for consumers to deliver the same services.
- Reasons given for ranking the **quality of tap water** as likely to be amongst the most affected by climate change included **increased pollution levels**, and water companies needing to **cut quality to save costs**.

“ I think the availability of water (rainfall) will be variable and will seriously affect supply. I trust the suppliers to maintain the standards they have. Costs will probably increase to maintain that quality of service in a climate change scenario.”

“ I think costs will increase with higher demand on services, this may impact on reliability of water and sewerage services to households. I don't think water quality and sewerage will be negatively affected.”

“ I believe the price will increase and the quality of tap water and sewerage treatment will be the most affected.”

Consumer actions to reduce climate change impacts

Can you think of any ways that consumers can help to reduce the contribution of water companies to climate change?

Participants' suggestions tended to focus on **reducing water usage**, including:

- Getting a water meter fitted
- Taking showers rather than baths
- Turning off the tap when brushing teeth
- Fixing leaks quickly
- Recycling used water for watering plants rather than using fresh water, and using grey water in the home (e.g. for toilets)
- Collecting rainwater in water butts
- Not over-filling kettles
- Using shorter washing machine cycles
- Avoiding use of hosepipes or sprinklers.

“One idea would be for Government and water companies to engage in a long term advice and education strategy aimed at reducing water usage in general.”

“... Husbanding a resource in as many ways as possible makes sense, whether it's efficient washing machines, grey water toilet cisterns, showers rather than baths or drought friendly gardens (and a lot more). Many of these are available now, some need building regulation encouragement. Others need simple education.”

“Get meters installed that can be read bi-monthly with an accurate bill for actual water usage.”

Water company actions to reduce climate change impacts

Are you aware, or not, of any existing measures that the UK's water companies are taking to reduce carbon emissions?

Few had heard of any such measures. The twelve participants who provided a responses mentioned:

- Influencing general information presented on the television about ways of avoiding water wastage.
- Avoiding water wastage which occurs in the process of water supply (e.g. leaking pipes)
- Using electric vehicles
- Generating renewable energy from sewerage
- Focussing on the energy efficiency of processes involved in water supply
- Installing water meters.

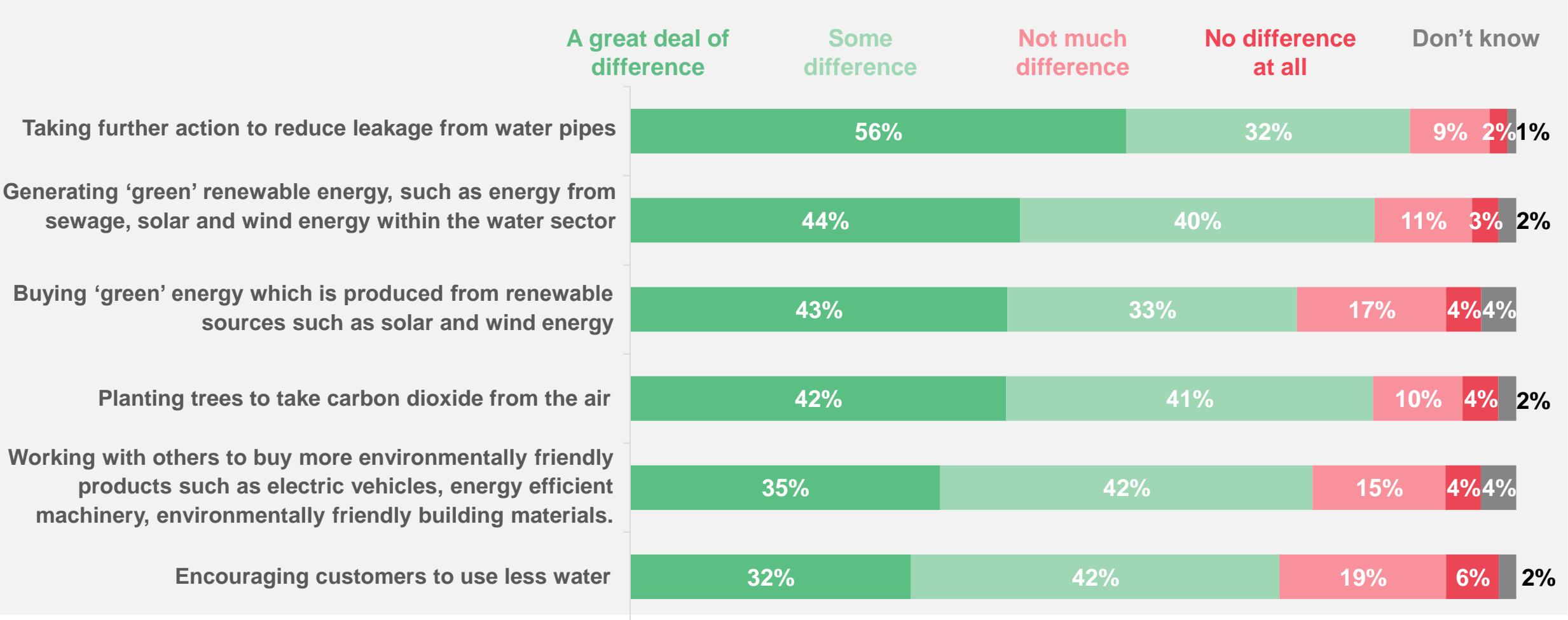
“None other than they are repairing old water and sewage pipes.”

“No I'm not aware of any as I thought the [water company] emissions were quite low anyway.”

“Water companies process sewage and then use what is left to generate clean energy. Many companies use this to help power sewage treatment plants (helping to save costs), some use it to create electricity and pass this back to National Grid to power your home.”

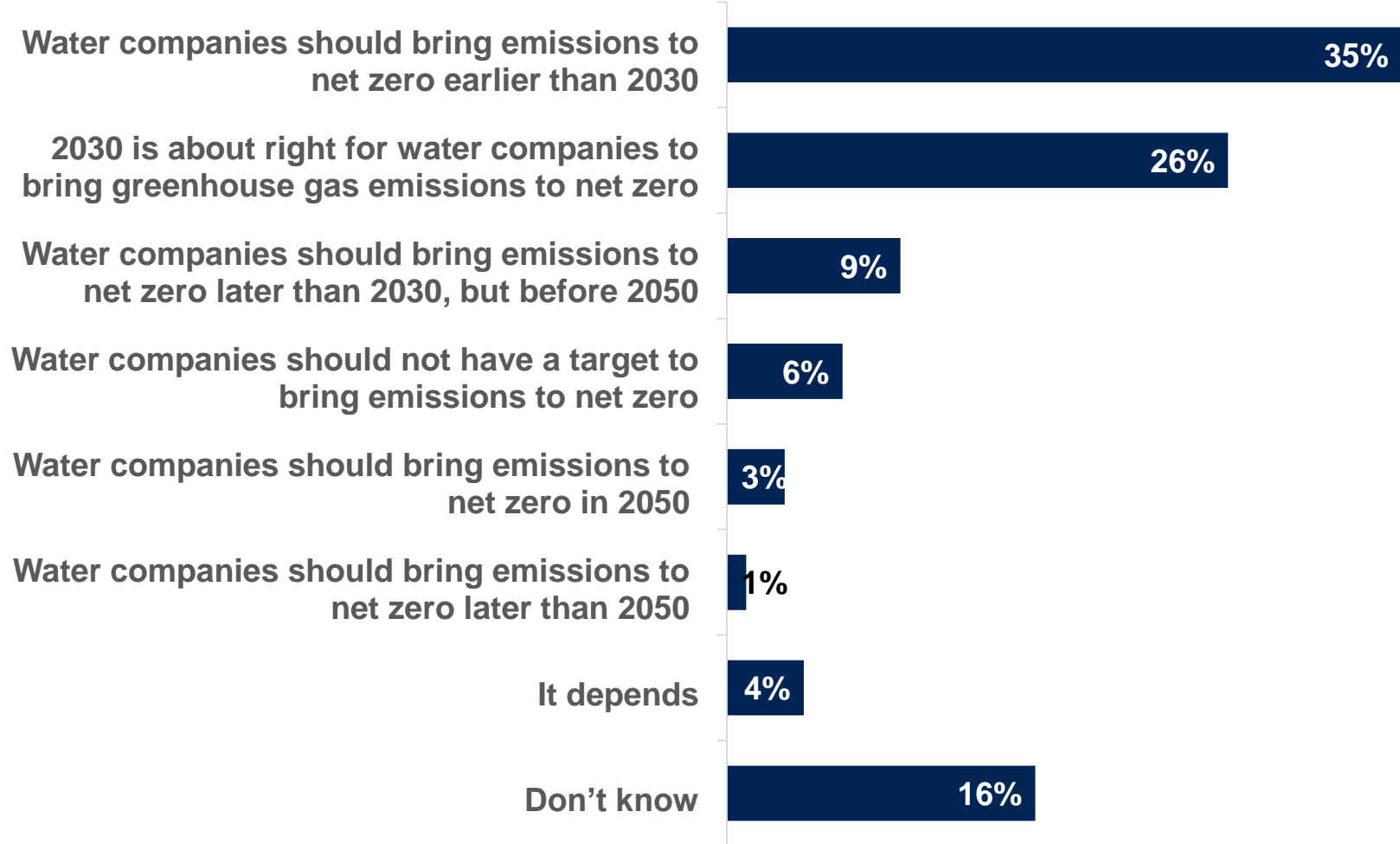
Water company actions to reduce emissions

Pumping and treating water is a process which uses energy, resulting in the emission of carbon dioxide, although water companies can take various measures to reduce their emissions. For each of the following, please tell us how much of a difference, if at all, you think they can make to reducing carbon emissions.



Views of the 2030 ‘net zero’ target for UK water companies

The UK’s water companies have set a target to become net zero by 2030. Which of the following statements best describes how you feel?



Q17: Please explain your answer:

“ Ten years should be more than enough time for companies to change some of the ways they operate.”

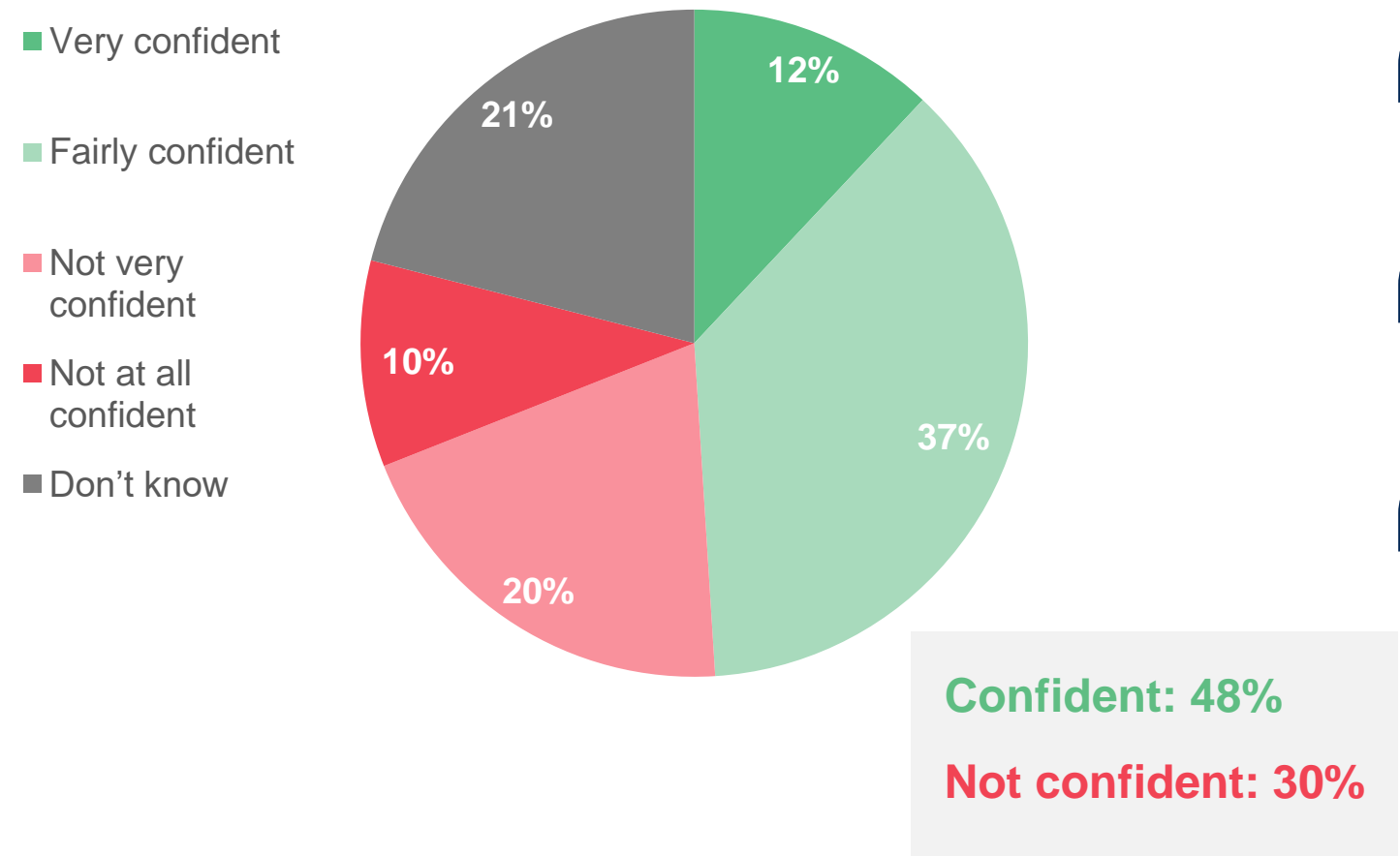
“ This sounds a tough target to meet but should be achieved within 10 years.”

“ If their emissions are as low as they say then it should be easier for them to reduce it further.”

“ This is an extremely urgent situation and needs to be effectively addressed immediately.”

Confidence in UK water companies meeting ‘net zero’ by 2030

How confident, if at all, are you that the UK’s water companies will meet their target of net zero by 2030?

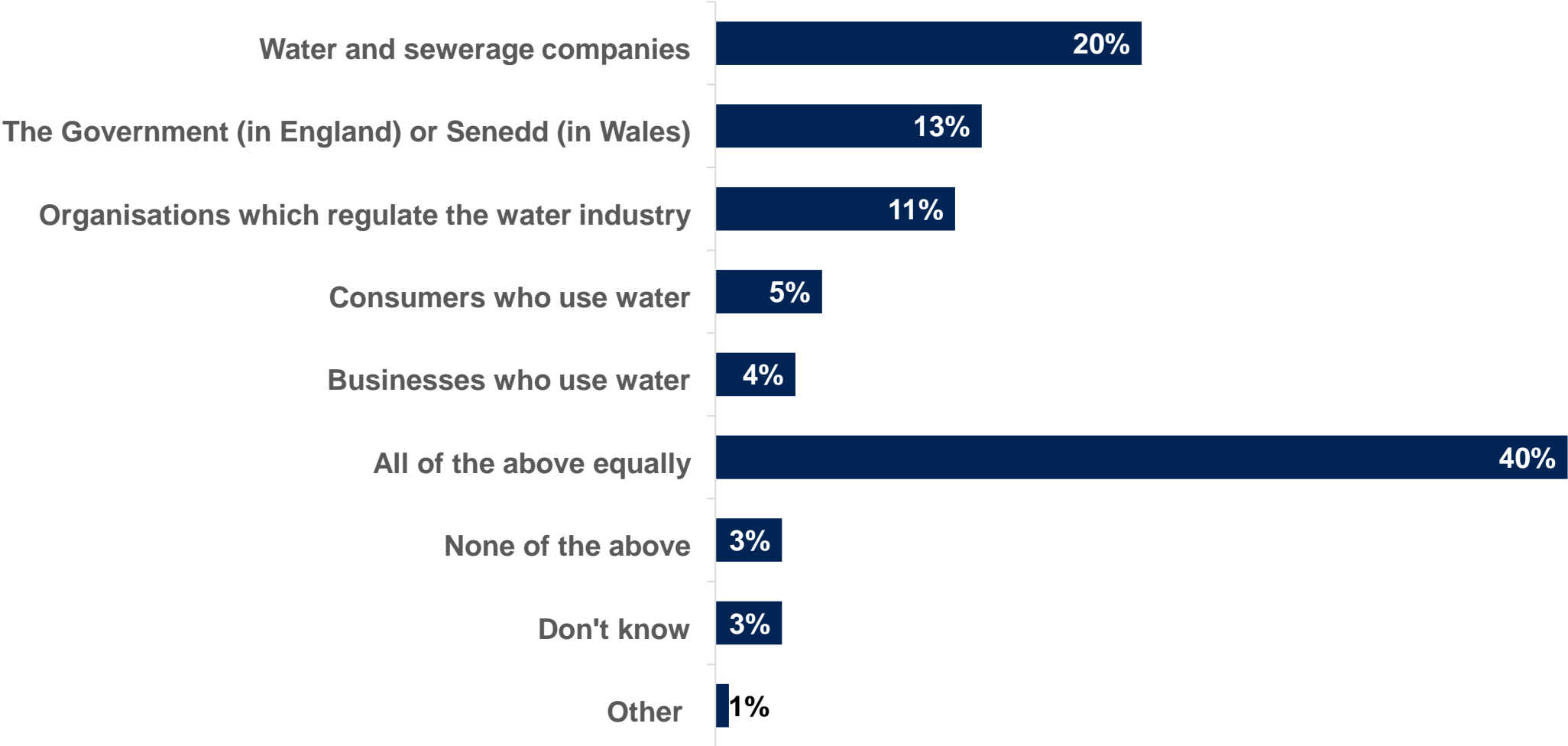


Please explain your answer:

- “ They are already at a low level which must have [taken] a lot of work on their part, and now [to] have the expertise to reduce further...”
- “ There are so many unpredictable factors involved, and cooperation from other bodies is required.”
- “ I'm not very confident in water companies, based on their mishandling of other projects.”

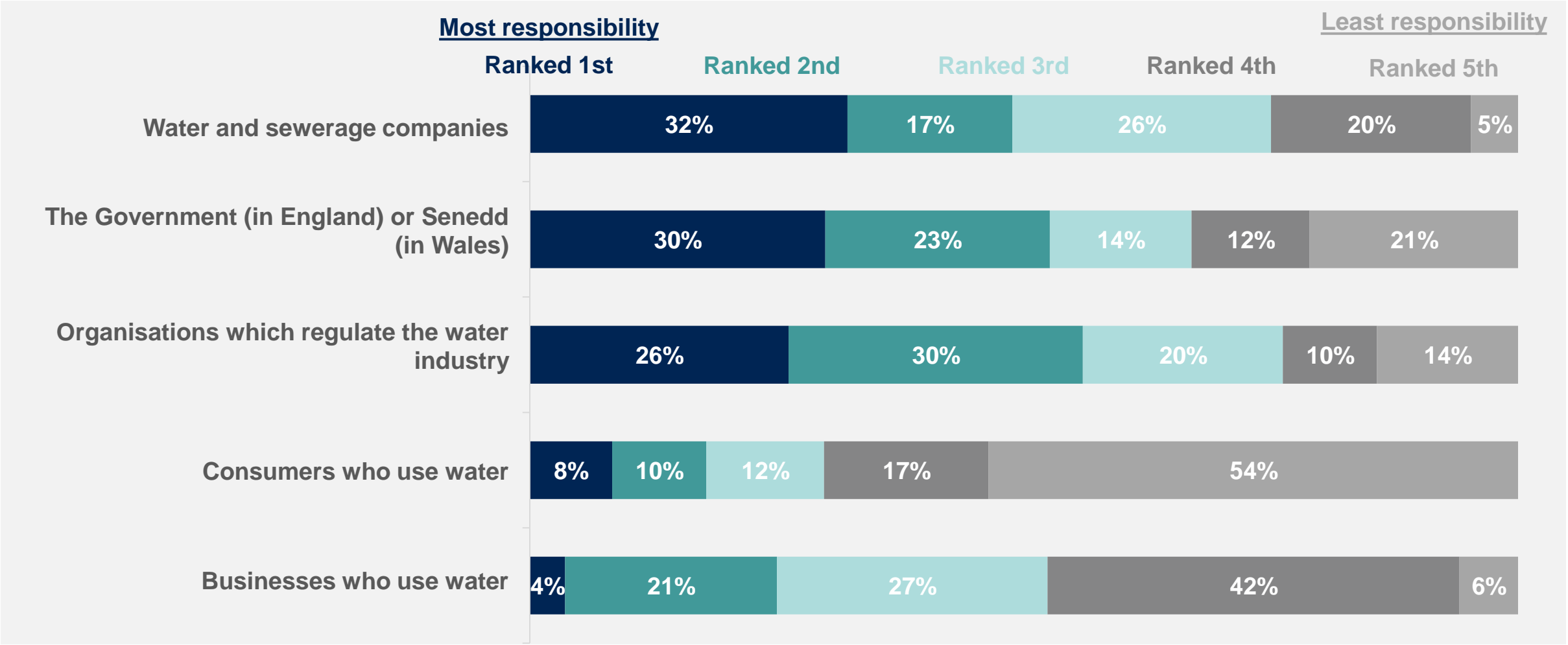
Responsibility for reducing carbon emissions related to water

Which of these, if any, do you believe should take most responsibility for reducing carbon emissions related to water and its supply? Please select one response.



Responsibility for reducing carbon emissions related to water

Please rank the following in the order that you think they should take responsibility for reducing carbon emissions related to water and its supply, from ‘most responsibility’ to ‘least responsibility’.



Activity insights (1)

- **Climate change is seen as the most important environmental issue facing Britain today** (from a list of issues presented). Forty eight per cent selected climate change, above waste generation (34%), air pollution and flooding (both 29%). By comparison, other environmental problems related to water are less likely to be seen as the most important – for example water pollution (9%), water shortages (8%) and poor quality drinking water (6%).
- **A much greater proportion say climate change is already affecting people in the UK (79%), and 45% think UK water companies are already feeling the effects** (although 15% say they don't know). Examples given of how climate change might affect the way water companies supply water in future include issues related to supply (e.g. water shortages due to lower rainfall) and (increased) demand, with impacts on water prices. Flooding and pollution were also linked to climate change. Participants **found it more difficult to explain how water companies themselves may impact climate change in the future** – only one mentioned companies' emissions.
- **Three in ten participants cannot estimate the percentage of the UK's carbon emissions that UK water companies are responsible for** (30% say 'don't know'), while 40% think the figure is between 0% and 20%. The correct figure is 1%, and once informed, many of those who commented consider this to be low.
- Echoing participants' spontaneous concerns about the impacts of climate change on water supply, **over half expect the amount of water in the environment which can be supplied to consumers, and the amount customers pay for it, to get worse over the next ten years** (53% and 54% say this, respectively). Participants are also more likely to think these will be most affected overall by climate change. Meanwhile, one in five think the quality of sewerage, quality of tap water and reliability of water and sewerage services may get better (20%, 20% and 19%, respectively). However, larger proportions think climate change will make no difference to these issues, and some think it will have a negative impact.

Activity insights (2)

- Suggestions for how **consumers** can help to reduce the contribution of water companies to climate change focused largely on **measures to reduce water consumption** in the home. **Few could think of any measures taken by water companies to reduce emissions** – those who could mentioned avoidance of water waste and renewable energy.
- Despite low initial awareness of the link between water company processes and climate change, participants are **optimistic that measures to reduce water companies' emissions can make a difference**. When presented with specific measures – including generating and buying renewable energy – a majority (at least 70% for each) think these could help reduce carbon emissions.
- **Twenty six per cent** think the 2030 'net zero' target for UK water companies is **about right**, and **35%** think companies should bring their emissions to zero **earlier** than 2030 (16% don't know), explaining the issue is urgent, and tackling it seems achievable in a ten year period.
- However, **less than half (48%) are confident that water companies will achieve net zero by 2030**, 30% are not confident and a significant proportion don't know (21%).
- Participants are most likely to say that **water and sewerage companies, the Government (or Senedd in Wales) and regulators should take most responsibility for reducing carbon emissions related to water and its supply** – above consumers and businesses. However, **40%** of participants think all of these actors take **equal responsibility**.

What does climate change mean for the water industry?: responses and key demographics

- **Invited to take part:** all registered community members.
- **Activity dates:** 20 May – 2 June 2020.
- **Responses:** 177 members participated, representing 28% of *WaterVoice* members in Window Four.
- **Incentive:** prize draw entry for ten £20 Amazon vouchers.

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

	Quotas	% Population Incidence*	Number of participants	% participants**
Age	18-29	4%	4	2%
	30-44	19%	36	19%
	45-59	36%	73	38%
	60-74	27%	69	36%
	75+	14%	12	6%
Gender	Male	47%	85	44%
	Female	53%	109	56%
	In another way	-	0	0%
Tenure	Owner occupier	65%	142	73%
	Renter	35%	52	27%

*Based on bill payers in England and Wales

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

What does climate change mean for the water industry?: responses by water company

Water Company	Number of participants	% participants
Affinity Water Central	5	3%
Affinity Water East	11	6%
Affinity Water South East	6	3%
Anglian Water Services Ltd	16	8%
Bournemouth Water Plc	3	2%
Bristol Water Plc	4	2%
Cambridge Water Company Plc	1	1%
Dŵr Cymru (Welsh Water)	14	7%
Essex & Suffolk Water	11	6%
Hafren Dyfrdwy	1	1%
Hartlepool Water Plc	1	1%
Northumbrian Water Ltd	13	7%
Portsmouth Water Plc	3	2%
SES Water Plc	1	1%
Severn Trent Water Ltd	12	6%
South East Water Plc	15	8%
South Staffs Water Plc	8	4%
South West Water Ltd	7	4%
Southern Water Services Ltd	14	7%
Thames Water Utilities Ltd	11	6%
United Utilities Water Plc	11	6%
Wessex Water Services Ltd	10	5%
Yorkshire Water Services Ltd	16	8%

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