

WaterVoice

Views of current customers on water resources

Summary report
October 2021



The voice for water consumers
Llais defnyddwyr dŵr

Foreword

One of the biggest challenges of our time is making sure that there is enough water for people and for the environment – now and into the future. Population growth, climate change and our own water use mean that the balance of water resources is shifting, to a point where, unless we take urgent action, the demand for water will outstrip available supplies.

We wanted to understand if customers are aware of the pressures on water resources in England and Wales, particularly in areas classified as being in serious water stress. This is important because understanding the challenges is a first step for people valuing water and taking action to reduce their personal water use. This research confirms that 4 in 10 customers living in water stressed areas think that water is plentiful where they live. This means that we all need to do more to improve customers' knowledge and understanding of these issues.

Water companies have a key role to play in managing water resources and raising awareness. But more than half of customers have not heard about the actions their water company is taking to manage water resources, and just 1 in 4 are aware of being asked by their water company to use less water. A key area of focus for CCW is how those in the sector can engage with customers more effectively, across a range of issues, including the need to use water wisely.

We want to see water companies, alongside others in the sector, taking all opportunities to raise awareness of the water resource pressures we face. In particular, the upcoming water resources management plans present an opportunity to raise awareness of the regional and national water challenges and their solutions. The sector must work together to share best practice on the most effective ways to engage with customers in order to achieve reductions in personal water use.

We all have a collective responsibility to take consumers with us on this journey as they are an important part of the solution to many of the challenges ahead.

Dr Mike Keil
Director of Policy, Research and Campaigns

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Executive summary



Executive summary



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Awareness of the availability of, and pressures on, water resources

- Half (50%) of respondents believe that water resources are plentiful where they live, while about a third (32%) think that water resources are limited in some way (either to a great or small extent) while nearly one in five (18%) simply don't know
- Those in water stressed areas are more likely to identify water resources as somewhat/very limited (39%) than those in other resource areas. However, 41% in water stressed areas felt that water is plentiful where they live, and 20% don't know.
- Similarly, respondents in areas which are not water stressed are more likely to say water is plentiful (58%) than those in other water resource areas.
- When asked to say why they rated their area as having plenty of water, nearly half (48%) did not select any particular reason, saying instead it was something they did not really know about. Those who said that water resources where they lived were limited were most likely to base this on a specific reason with 26% saying they had seen messages from their water company asking people to use less water, although a further 20% said it was something they didn't really know about.
- Those who perceive their area to have plenty of water resources, give the main reason for their answer as it not being something they really know about (48%), followed by it rains/floods a lot in my area (30%)



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What customers would be prepared to do to help

- Respondents were asked, if they were to live in an area of limited water resources, what would they be prepared to do to help to use less water. There are high levels of willingness to help in a number of ways (>80%); but customers are least likely to say they would help by fitting and trialing a water meter (56%) and accepting a community challenge to use less water in return for a community reward (56%)
- Metered customers (88%) and those in Wales (89%) were more likely to say they would help by making sure there were no leaks from the pipework they are responsible for
- Unmetered customers are significantly less likely (14%) than metered customers to say they would make sure there were no leaks from the pipework they are responsible for
- Metered customers are also more likely to say they would fit water saving devices (83%) compared to unmetered customers (22%)
- Those who live in areas which are not water stressed are much more likely to say they would change their habits to use less water (85%), than those in potentially water stressed areas (78%). 83% in water stressed areas would be willing to change their habits to use less water
- Older age groups are more likely than younger to be willing to help to conserve water if they lived in a limited water resource area



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Preferences and expectations for how water companies should manage water resources

- If water resources were limited and there was a risk in the future of more hosepipe bans and restrictions on water use, the top three expectations for water company actions are to 'fix more leaks, more quickly' (56%), 'ask people to use less water and give water saving tips and advice' (37%) and 'reward households that save water with a special discount off their bill*' (29%)
- Almost one-third (30%) of those living in water stressed areas expect water companies to fit more water meters, whereas one-quarter in potentially water stressed areas (26%) and not water stressed areas (25%), would want water companies to do this
- Metered customers are more likely than unmetered customers, to expect water companies to fit more water meters (31% vs 23%) and charge more for households that use a lot more water than other similar sized households (17% vs 12%)
- Unmetered customers are more likely than metered customers to expect water companies to engage with communities to use less water and give them community incentives like free swimming lessons for children (15% vs 10%)
- Customers in Wales are slightly less likely than those in England to expect more leaks to be fixed more quickly (51% vs 57%) but are more likely to say they expect to get more water in other ways e.g. build more reservoirs (33% vs 23%)
- To help customers use less water more than 6 in 10 customers would want their water company to offer a special discount off their bill if they saved water (69%), offer free or discounted water saving devices (61%) and over half would like a free visit to check their home and supply pipe for leaks (54%)
- Metered customers compared to unmetered customers are more strongly in favour of being offered a special discount off their bill (74% vs 63%) and being offered free or discounted water saving devices (64% vs 57%) by water companies to help customer use less water



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Awareness of social media campaigns to save water

- More than one-in-four (28%) are aware of being asked to use less water by their water company
- More than half (53%) are not aware of any measures that water companies take to manage water resources
- When it comes to awareness of social media campaigns, less than one-in-ten recall having seen water saving tips on social media (9%). Of those who have seen these type of adverts, metered customers are more likely to recall them (12%) than unmetered customers (7%)
- Many mention Facebook, Twitter and YouTube as sources of these adverts with ads mainly from water companies advising on water and money saving tips, water saving devices and mentions of community challenges
- More than six-in-ten of those that recall them, report they took action after seeing the social media adverts (63%)
- Metered customers (14%) are more likely to recall messages from their water company that their areas has limited water resources than those who are unmetered (6%)



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Views on supply pipe leak repair policies

- Views on water companies' policies for the repair of leaks on customer owned supply pipes differ by age groups
- Respondents were shown the types of help typically offered by water companies to customers with leaks on pipework they are responsible for. Customers most preferred having the first leak repaired for free and being shown how to check for leaks in the future (56%), followed by the company and customer each paying towards the cost of the repair (14%)
- Nine-in-ten agree that every water company should (in principle) offer the same level of help to all customers with water supply leaks (89%)
- Agreement with this statement declined, though was still high at 85%, once customers were made aware that some water companies offer more help than others and in setting one consistent level of help, some customers may get less help than before and others more
- There were mixed views amongst those who felt help should be consistent, as to how this should be done, The top three reasons were: 'only if they offer the higher levels of help though I wouldn't be prepared to pay a bit more on my bill for this' (24%), 'I'd rather see companies offer the same high level of help but just for people in vulnerable circumstances' (22%) and 'only if they offer the higher levels of help and I'd be prepared to pay a bit more on my bill for this' (22%)



Background, objectives and methodology



Background and Objectives



Key objective – Gain an understanding of water customers’ awareness of the water resources situation where they live, their preferences to help manage water resources and water use, and understand views on water company leak repair policies.

This research will help inform CCW’s policy-making activity , for example responses to consultations, interaction with water companies and other stakeholders. Information shared with water companies and other relevant parties will help to inform their future plans.

This research looks to answer five key objectives which have been outlined below:

1

To identify awareness of water resources and pressures on water resources

2

Identify preferences and expectations for how water companies should manage demand for water, to help water resources and the availability of water for public supply

3

Determine what customers would be prepared to do to help to save water e.g., fit water saving devices

4

Gauge awareness of social media (Facebook, twitter, other) campaigns to save water in the last 12 months

5

Get in principle views on water company supply pipe leak repair policies

Overview



Online survey of 1,870 adults (aged 18+) in England and Wales



Fieldwork conducted 9-11th April 2021



The full sample has been weighted to be representative of England and Wales combined based upon the 2011 census profile. The boost sample has been weighted down to be representative of Wales

Approach

CCW commissioned Yonder to undertake an online omnibus survey in England and Wales.

Yonder own and manage a highly engaged online panel of 180,000 UK adults and this resource was used as the primary source of sample for the online survey.

Yonder conducted 1,870 online interviews with consumers in England and Wales. Boost interviews were conducted among consumers in Wales to allow for robust analysis and weighted back into the overall sample at the correct proportions.

The first question in the survey identified responsibility for paying water bills. All respondents with responsibility, were asked all questions in the survey. 60% pay for their water bill solely and 40% pay for it jointly.

Sampling

A stratified sampling technique was employed using multiple demographic groupings to select respondents randomly from Yonder's online panel. This approach helps to minimise selection bias and ensure certain segments of the population are not over- or under-represented.

Quotas were set on age, gender, region and social grade. The data was then weighted based upon the 2011 Census profile of England and Wales combined. Rim weighting was applied for age, gender, government office region, social grade, taken a foreign holiday in the last 3 years, number of cars in the household, and working status. Tenure was weighted based upon the England and Wales profile as individual nations. The boost sample was weighted down to match the 2011 Census profile of Wales. See appendix for further details.

Background to key sub-groups used for analysis



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In February 2021 the Environment Agency published a consultation about changing the water resource classification of some water company areas in England from not water stressed to water stressed. For the analysis in this report, water company areas have been broken down into 'water stressed', where they have previously been classified as this and there is no plan to change from this classification, 'potentially water stressed' where the water company area is part of the Environment Agency consultation above (the consultation had not concluded at the time of this survey), and 'not water stressed' where they have previously been classified as this and there are no plans to change. The sub-group analysis slide which follows explains more about this analysis.

Defining whether an area is classified as being in 'serious water stress' provides an indication of the availability of water resources. This takes into account rainfall, how much of it reaches rivers, streams or underground storage, how much water is taken to meet everyone's needs, and expectations around population growth. In areas classified as being in 'serious water stress', rainfall may not be enough to meet the demands of households now or in the future.

Even in areas that are not considered to be in 'serious water stress' is important to think about how we use water and how our water can affect the environment in a negative way.

Key sub-groups used for analysis

Water resources areas analysis

Throughout the report data is analysed by those who live in a water stressed, potentially water stressed and not water stressed parts of England and Wales. The group was assigned based on responses to the following question:

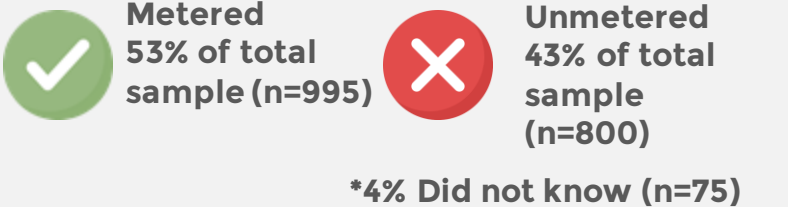
Which water company provides your water services?

Water stressed areas (WS)	Potentially water stressed areas (PWS)	Not water stressed areas (NWS)
Thames Water	Cambridge Water	Bristol Water
Southern Water	Portsmouth Water	Northumbrian Water
Affinity Water	Wessex Water	Yorkshire Water
Anglian Water (East Anglia)	Severn Trent Water	United Utilities
Essex and Suffolk Water	South Staffs Water	South West Water (Devon and Cornwall)
SES Water	South West Water (Scilly Isles)	Welsh Water
South East Water		Anglian Water (Hartlepool)
South West Water (Bournemouth area)		Hafren Dyfrdwy (formerly Dee Valley Water)
= 40% of total sample (n=720)	= 21% of total sample (n=342)	= 39% of total sample (n=808)

Bill type analysis

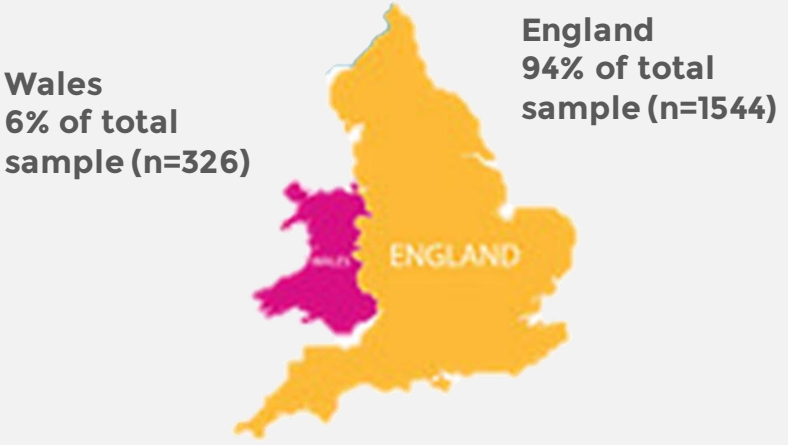
The findings are also analysed by those who have a water meter installed.

Does your household have a water meter?*



Country analysis

The findings are also analysed by country:



Scope and Limitations of this Report



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Scope

This report aims to establish attitudes and behaviours of the overall England and Wales population and highlights results at an overall level as well as by the key sub-groups as outlined in the Table 1. It provides a robust sample to be able to analyse the data on this basis.

The statistical reliability of the data at 95% confidence level is outlined in Table 1

In addition to highlighting key subgroups significantly different to the total, results are also charted for other sub-group categories of interest when data is significantly different to the total.

Statistical differences legend (at 95% confidence)

- ↑ Statistically **higher** than the **total**
- ↓ Statistically **lower** than the **total**
- ★ Statistically **higher** than **all other lower scoring options**
- ★ Statistically **lower** than **all other higher scoring options**
- + Statistically **higher** than all other categories **within the subgroup**
- Statistically **lower** than all other categories **within the subgroup**

Table 1	Key subgroups	Sample Size	Margin of Error for response of 50%
	Total sample	1,870	+/- 2.3%
Region	England	1,544	+/- 2.4%
	Wales	326	+/- 5.3%
Water resource area	Water stressed	720	+/- 3.7%
	Potentially water stressed	342	+/- 5.3%
	Not water stressed	808	+/- 3.4%
Bill type*	Metered	995	+/- 3.1%
	Unmetered	800	+/- 3.5%

*Bill type excludes those who didn't know if they had a water meter or not (n=75)

Limitations

This research was completed online. In general, online respondents are more technically knowledgeable and are more likely to be early adopters of new technology products and services.

Online survey respondents are also incentivised to complete surveys. To counter this, rigorous quality control procedures were implemented to maximise the attention paid by respondents when participating in the survey and avoid 'happy clicking' or rushing through surveys to reach the reward at the end.

General profile of key subgroups

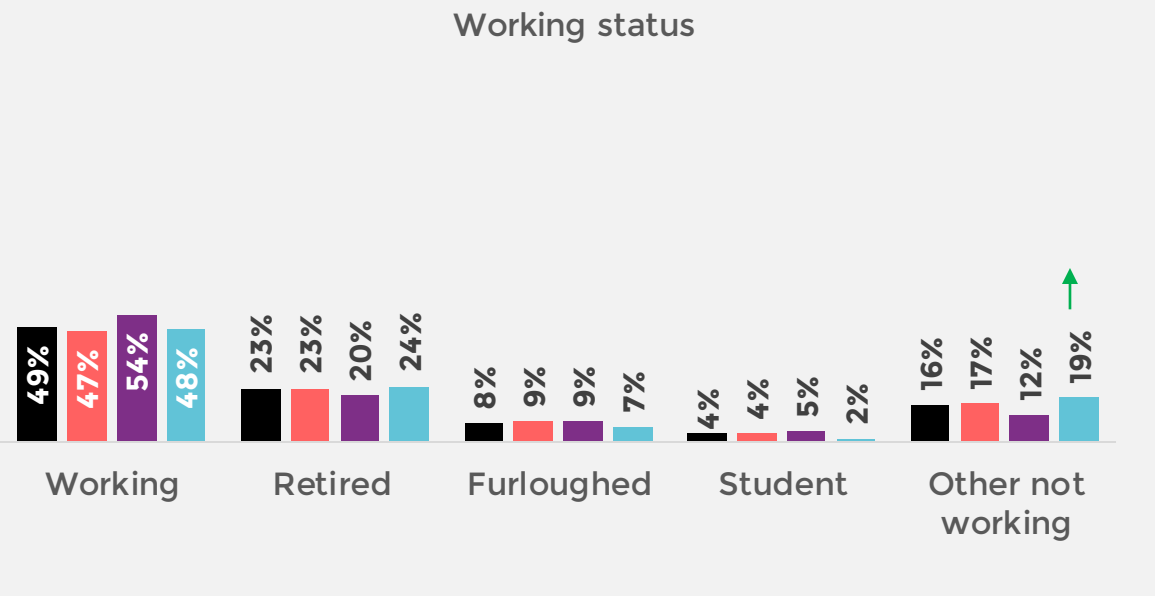
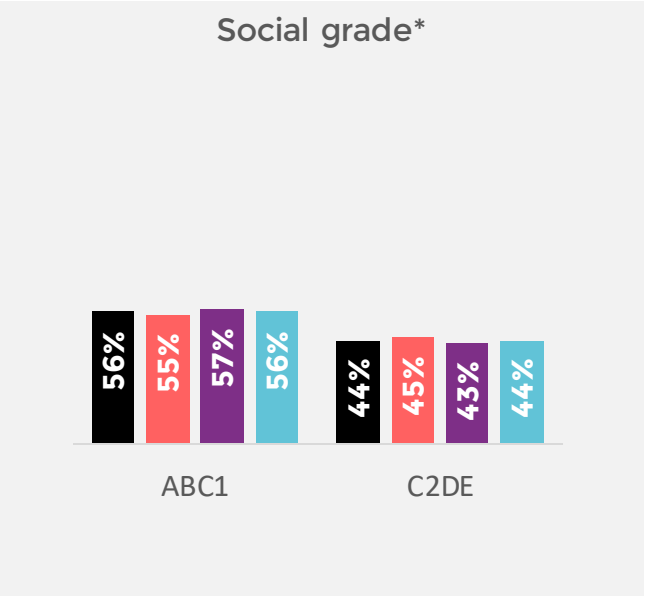
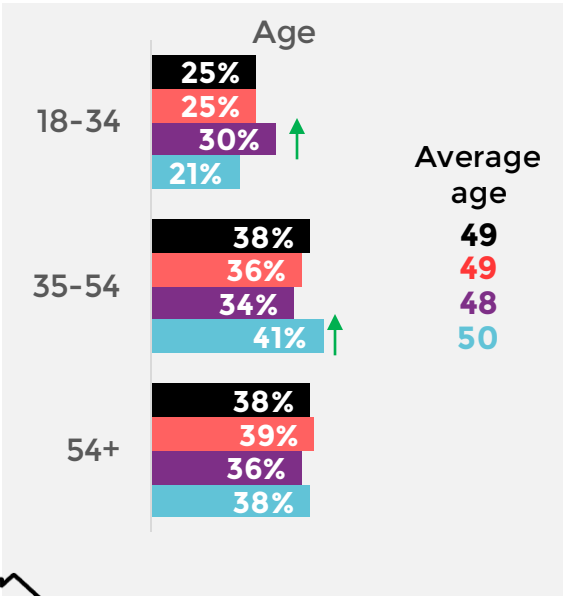
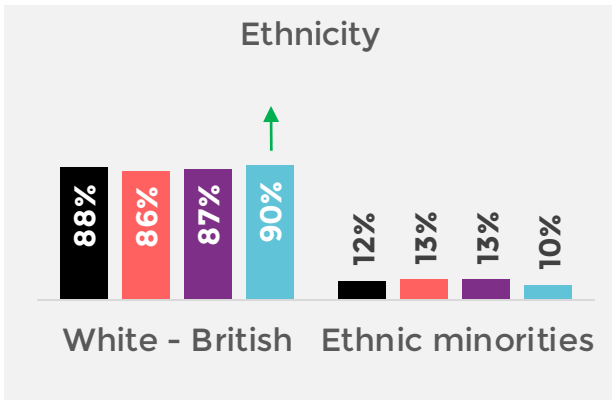
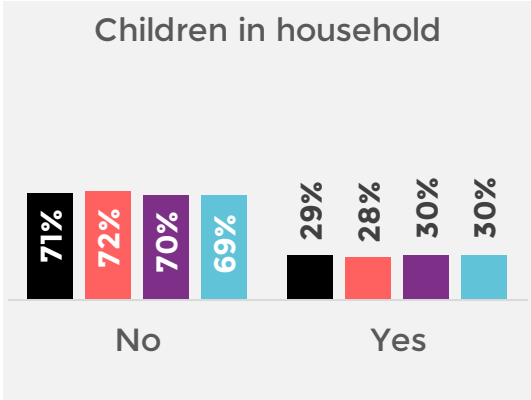
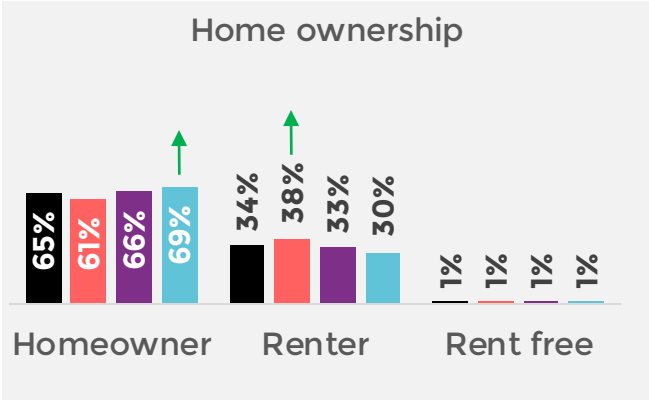
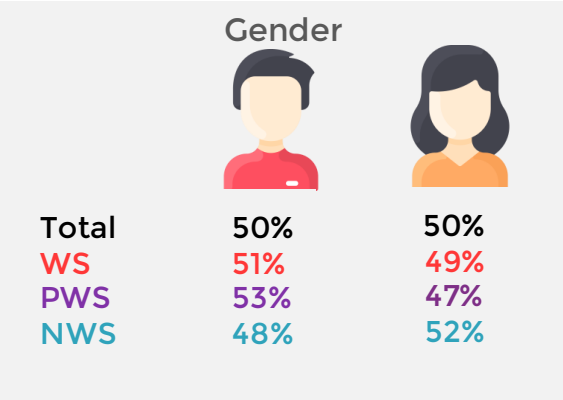
Breakdown of sample by water resource area



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■ Total ■ Water stressed (WS) ■ Potentially water stressed (PWS) ■ Not water stressed (NWS)

* Social grade is a demographic classification based on the occupation of a household's chief income earner. AB is higher or intermediate, managerial, administrative or professional; C1 is supervisory or clerical and junior managerial, administrative or professional; C2 is skilled manual workers; DE is semi-skilled and unskilled manual workers, state pensioners, casual workers and unemployed with state benefits only



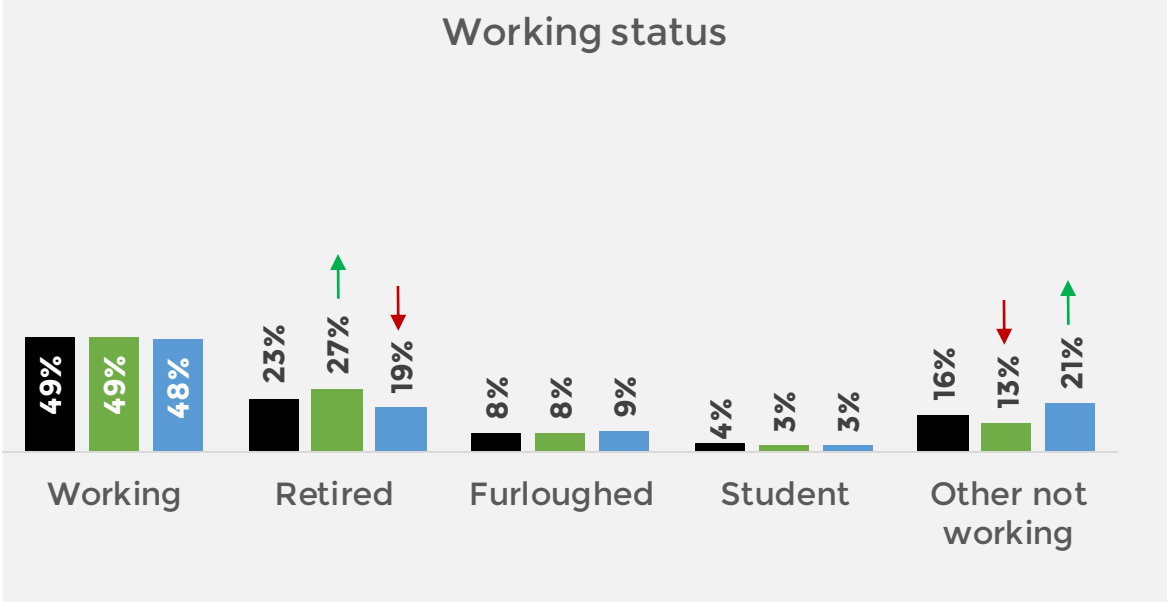
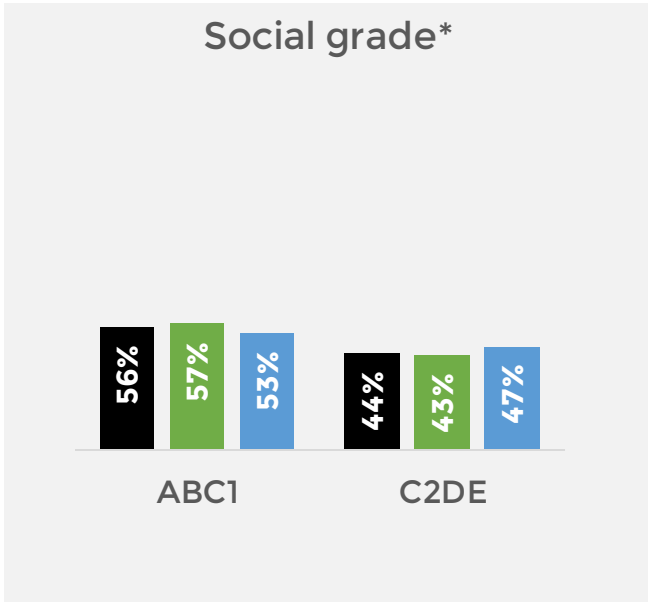
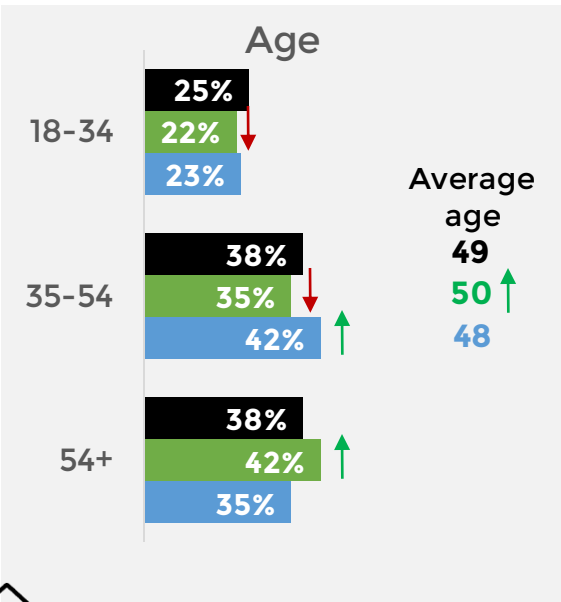
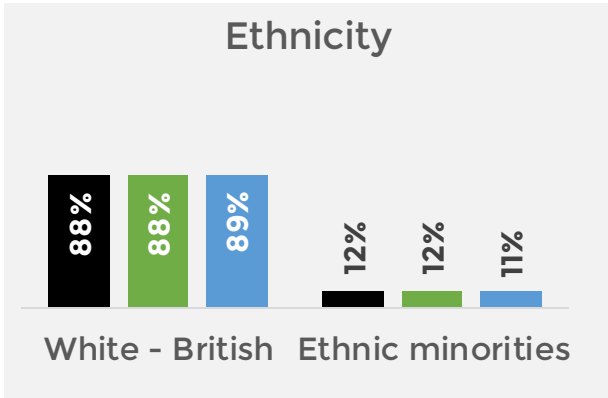
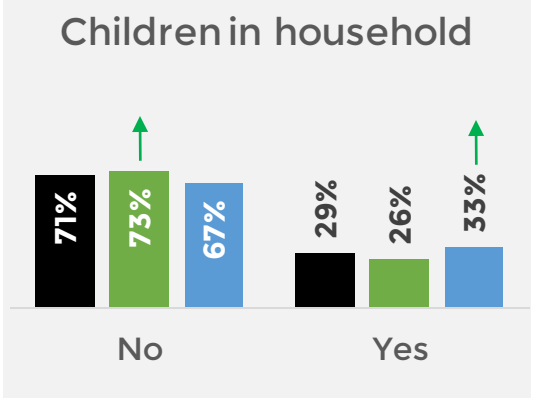
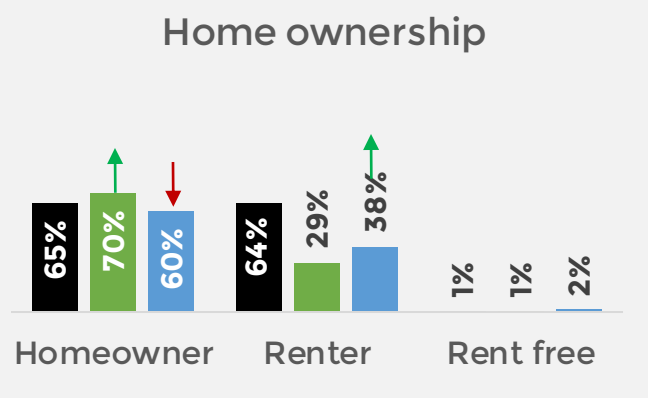
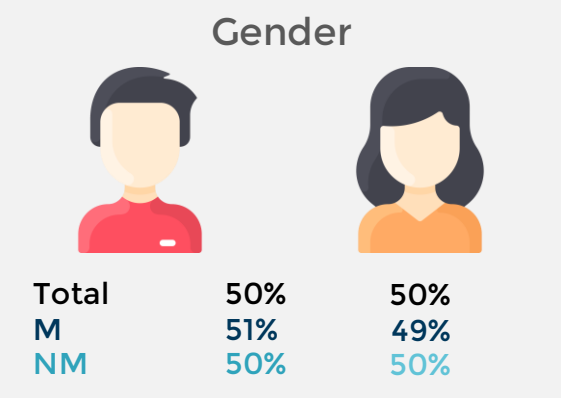
Demographics of metered and unmetered samples



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■ Total ■ Metered customers (M) ■ Unmetered customers (NM)

* Social grade is a demographic classification based on the occupation of a household's chief income earner. AB is higher or intermediate, managerial, administrative or professional; C1 is supervisory or clerical and junior managerial, administrative or professional; C2 is skilled manual workers; DE is semi-skilled and unskilled manual workers, state pensioners, casual workers and unemployed with state benefits only

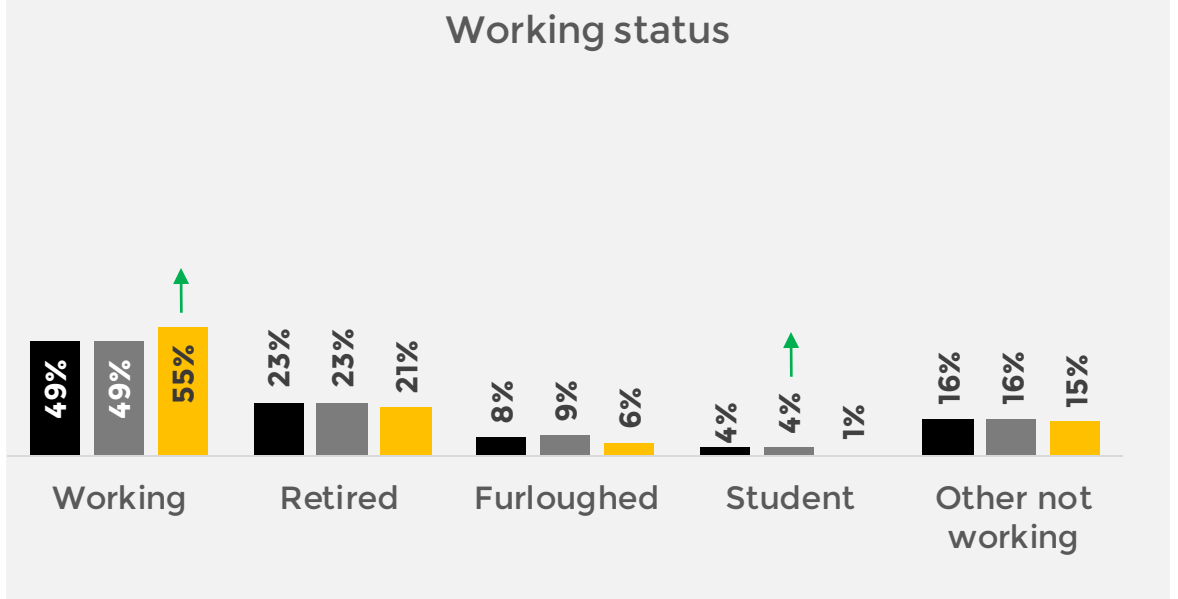
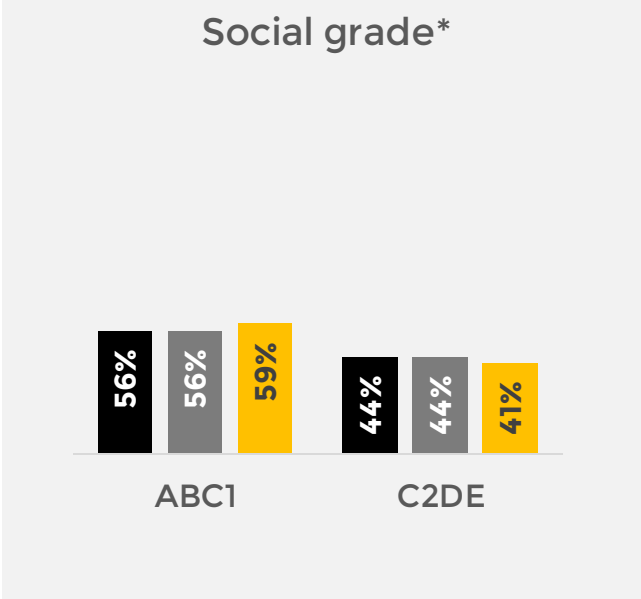
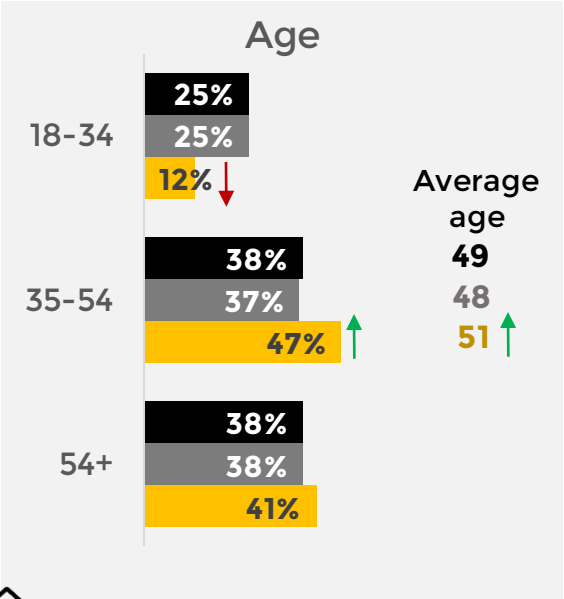
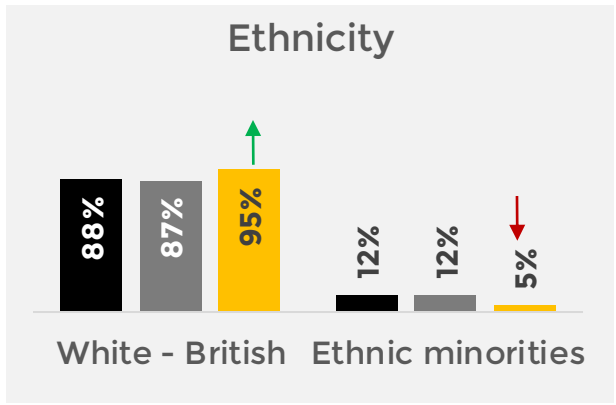
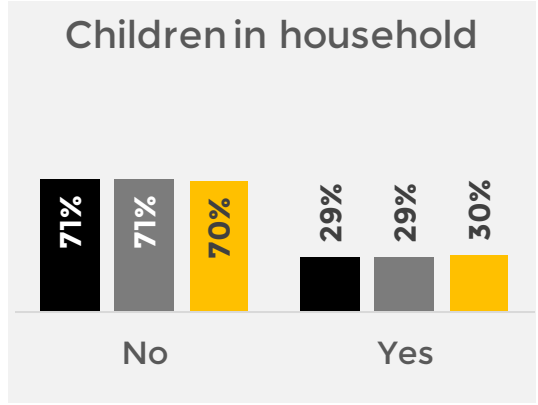
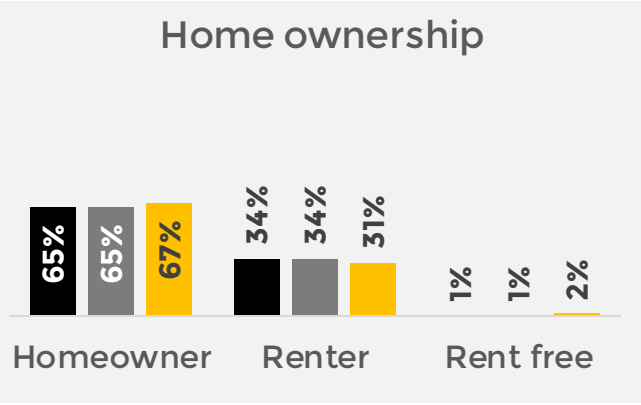
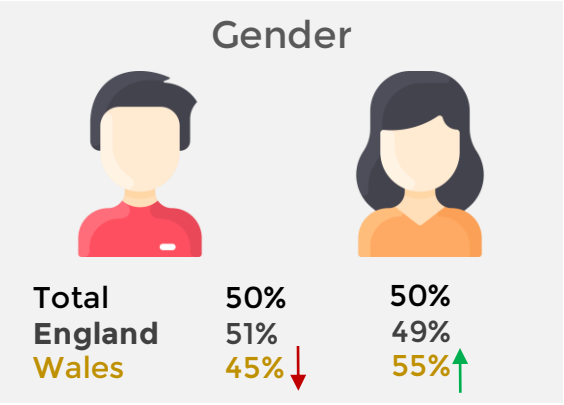


Breakdown of sample for England and for Wales**



■ Total ■ England ■ Wales **NB: See appendix for further details on weighting profiles

* Social grade is a demographic classification based on the occupation of a household's chief income earner. AB is higher or intermediate, managerial, administrative or professional; C1 is supervisory or clerical and junior managerial, administrative or professional; C2 is skilled manual workers; DE is semi-skilled and unskilled manual workers, state pensioners, casual workers and unemployed with state benefits only

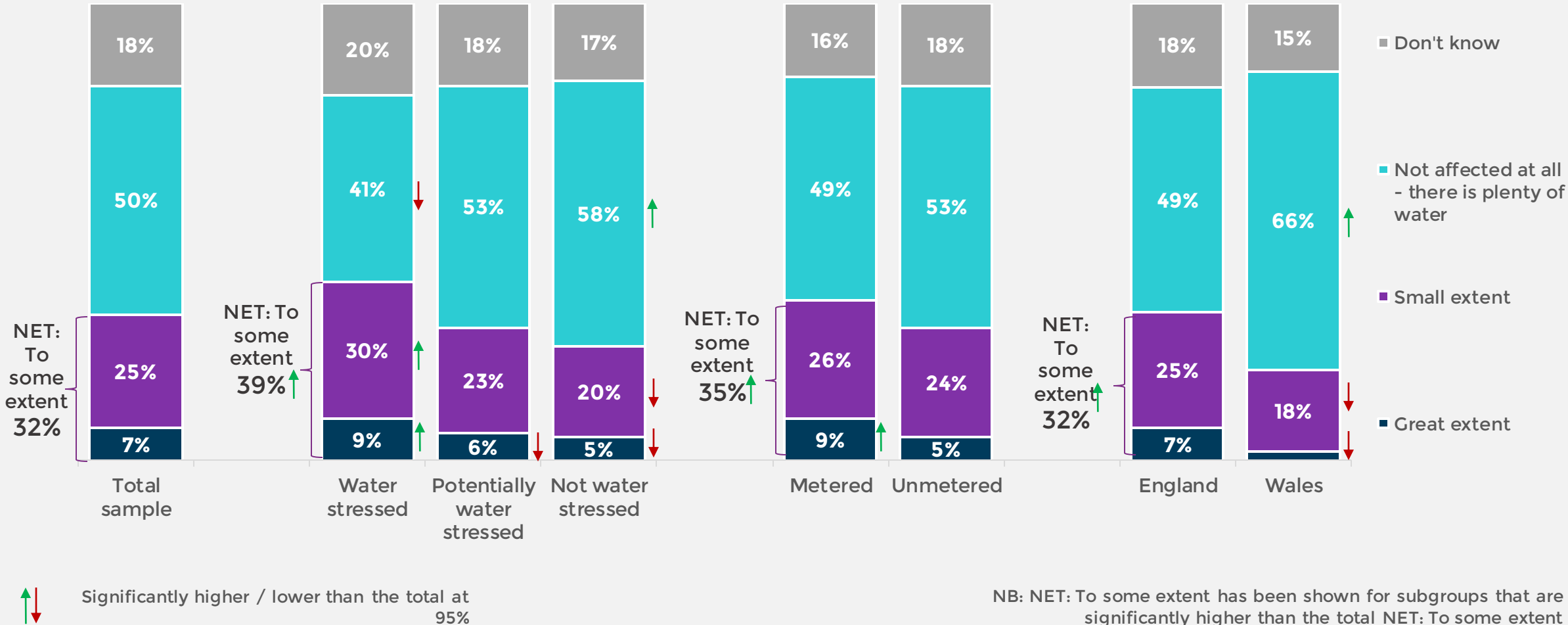


Awareness of the availability of, and pressures, on water resources



41% of customers in water stressed areas think water resources are plentiful

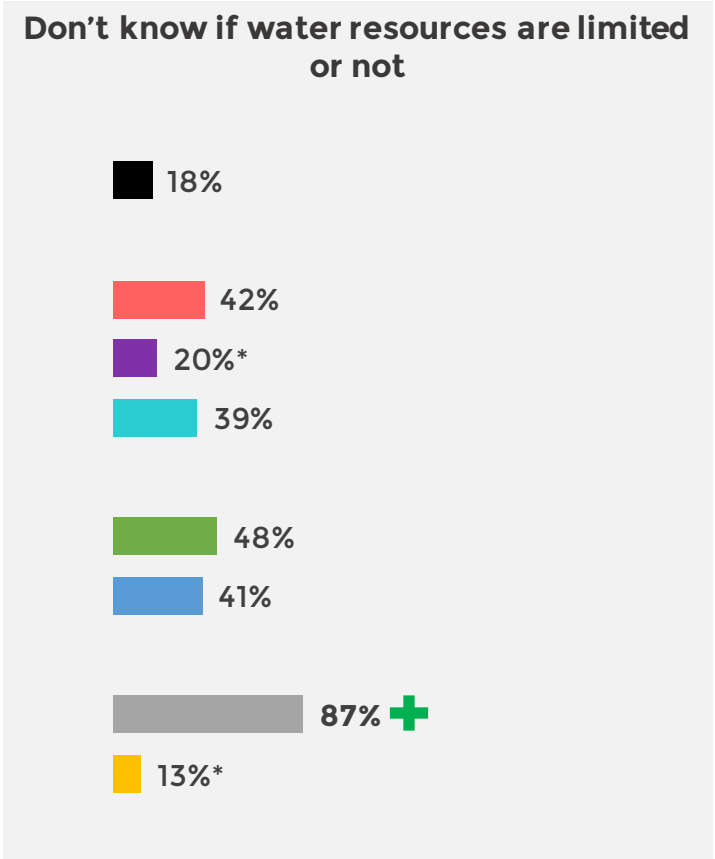
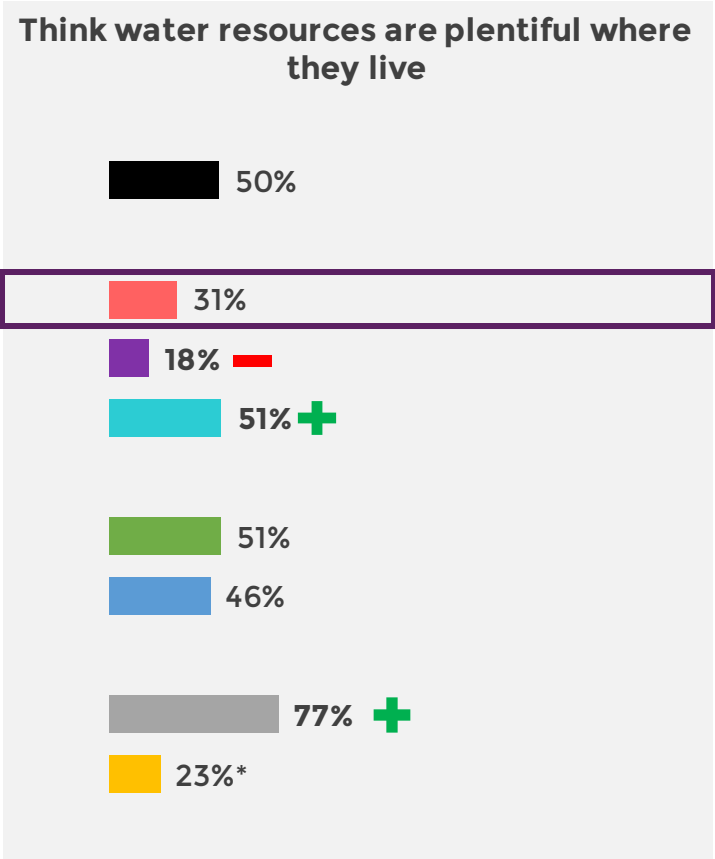
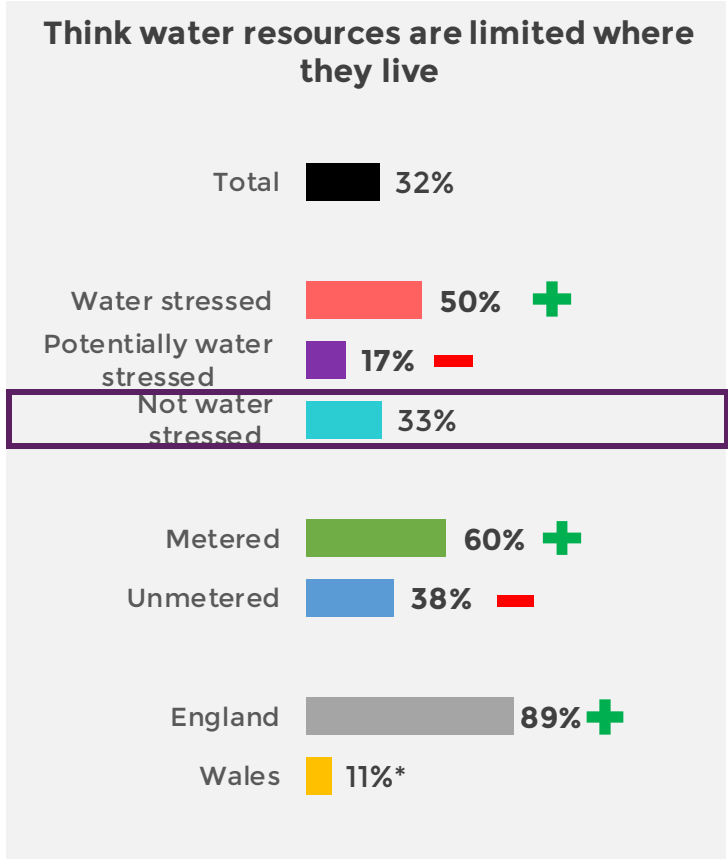
Claimed awareness of current water resource situation:



Nearly a third (31%) of people who think water resources are plentiful where they live are in water stressed areas

Claimed awareness of current water resource situation by key subgroups

+ Statistically higher than all other categories within the subgroup
- Statistically lower than all other categories within the subgroup
*Caution low base



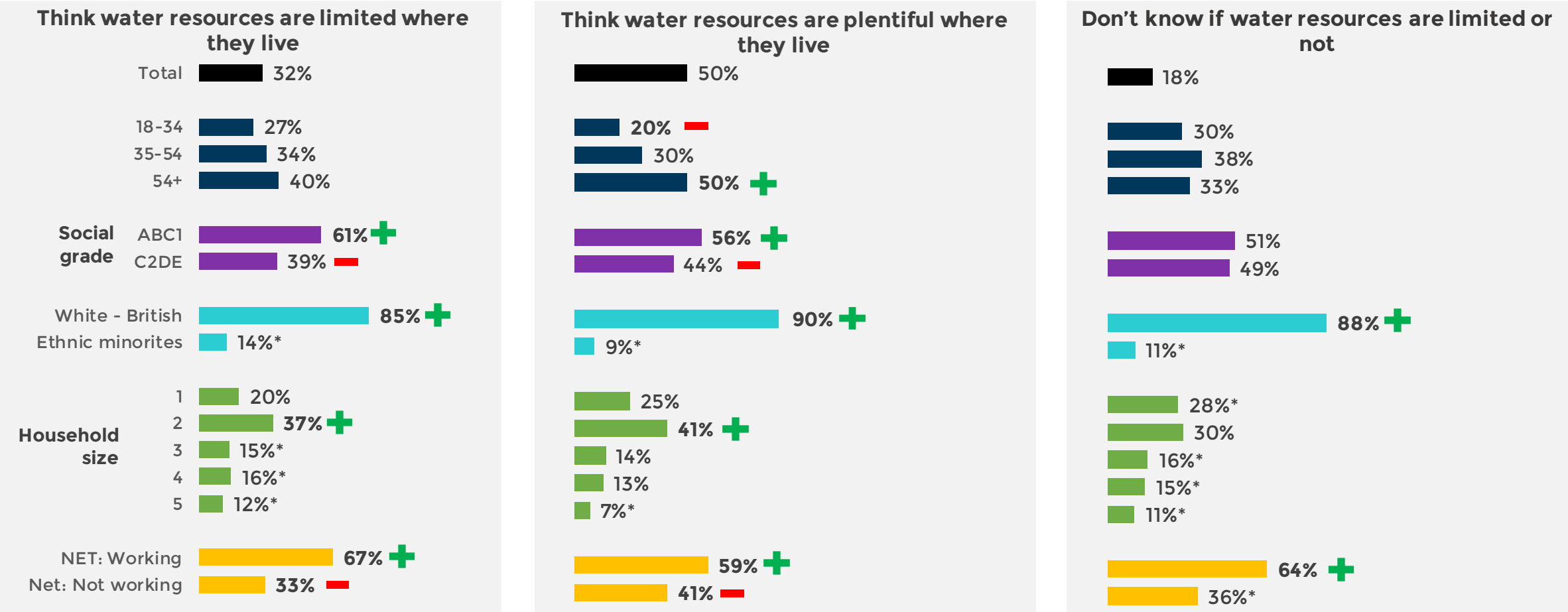
Those who think water resources are limited where they live are more likely to be social grade ABC1s (61%), those who are white - British (85%) and those who are working (67%)



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Claimed awareness of current water resource situation by demographic subgroups

+ Statistically higher than all other categories within the subgroup
- Statistically lower than all other categories within the subgroup
*Caution low base



The water company is the main influence driving perceptions of a limited water resource situation (44%). Perceptions of plenty of water resources are linked to it not being something people really know about (48%) and lots of rain or flooding in the area (30%)



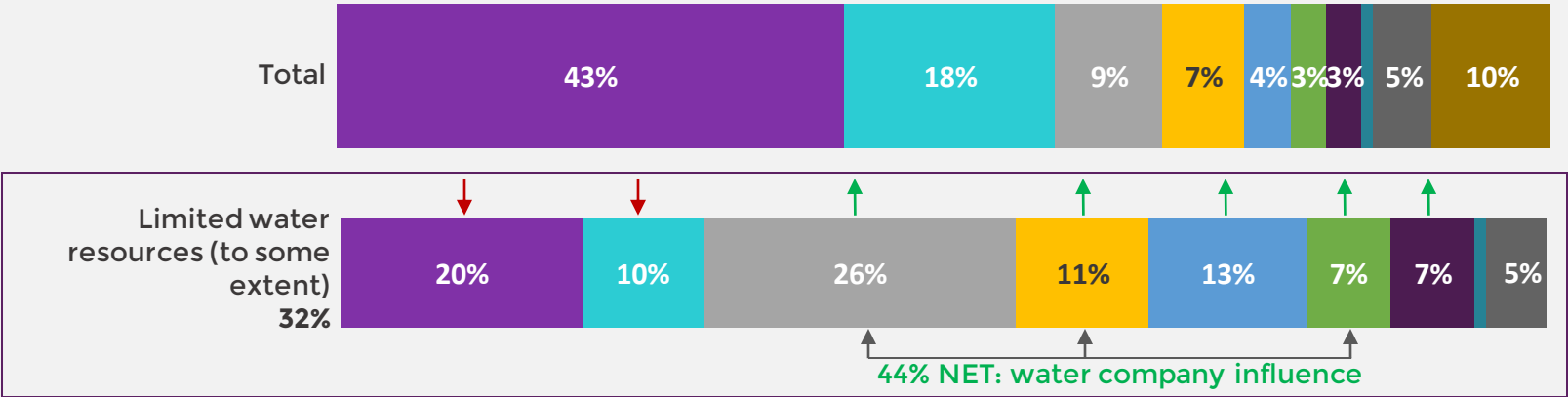
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% Main reason given for perceived water resource situation – by awareness of water resources

- It's not something that I really know about
- It rains/floods a lot in my area
- I've seen messages from my water company asking people to use less water
- Heard it from my water company
- I've noticed dried up streams, low river levels or other evidence of these issues in my local area
- My water company fitted a water meter for my home because of local water resource issues
- I've been affected by a hosepipe ban
- Heard it from somewhere other than my water company
- Other
- Don't know

Water company influence

Significantly higher / lower than the total at 95%



12% NET: water company influence

2% NET: water company influence

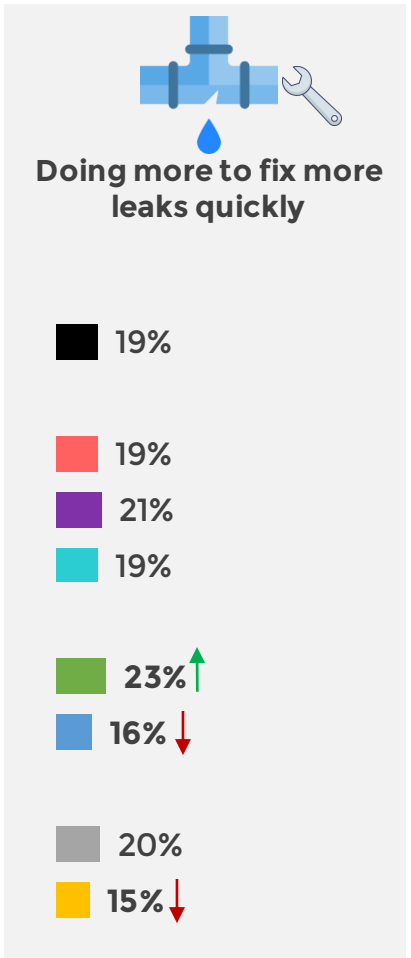
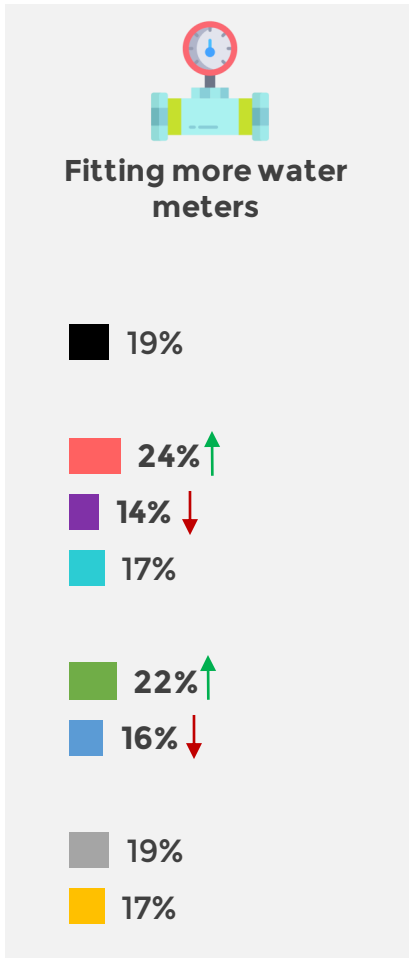
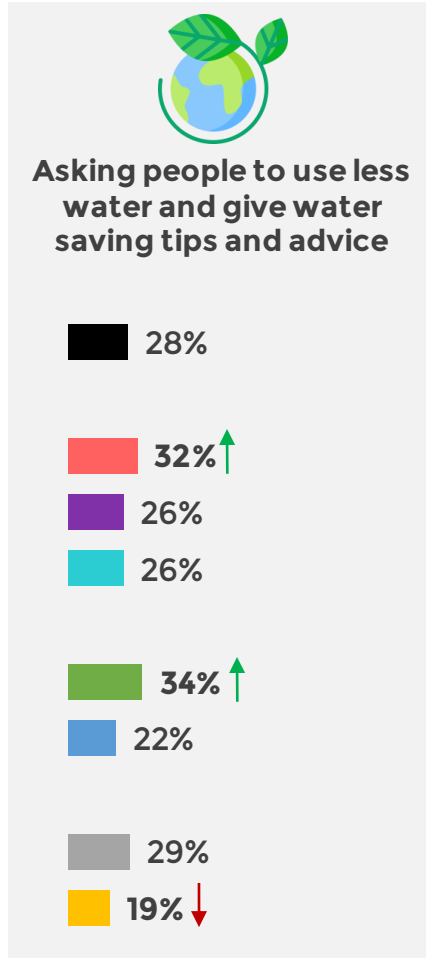
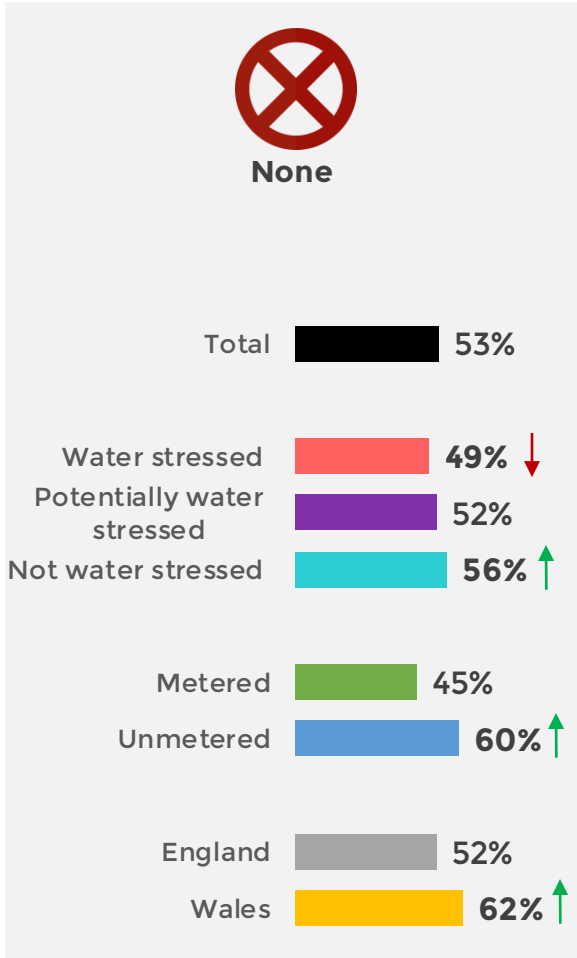


More than half (53%) have not heard their water company do anything to manage water resources, however more than 1 in 4 are aware of being asked by their water company to use less water (slide 1 of 2)



% Awareness of water companies managing resources by subgroups

Significantly higher / lower than the total at 95%



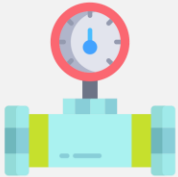
The following options all at 5% or lower awareness:

- Getting more water e.g., plans to build more reservoirs
- Engaging with communities to use less water and give them incentives like free swimming
- Charge more for households that use a lot more water than other similar sized households
- Rewarding households that save water with a special discount off their bill

Unmetered customers are more likely to lack awareness of measures being taken by water companies to manage water resources than metered customers (slide 2 of 2)



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Metered customers are more likely to be aware of their companies asking people to use less water, fitting more meters and fixing leaks



Unmetered customers are much more likely to be unaware of any of these things that their water company could be doing to balance the demand and supply of water with 60% saying they had not heard of any of these things compared to 45% of metered customers



Customers in water stressed areas are specifically more aware of water companies asking people to use less water and fitting more meters but overall are less aware of the wider measures being taken by water companies.

This shows many customers don't pick up on information about what companies are doing to manage water resources. It is a bigger issue for unmetered customers than metered, though water companies may need to do more to help engage all of their customers



What customers would be prepared to do to help companies manage water resources



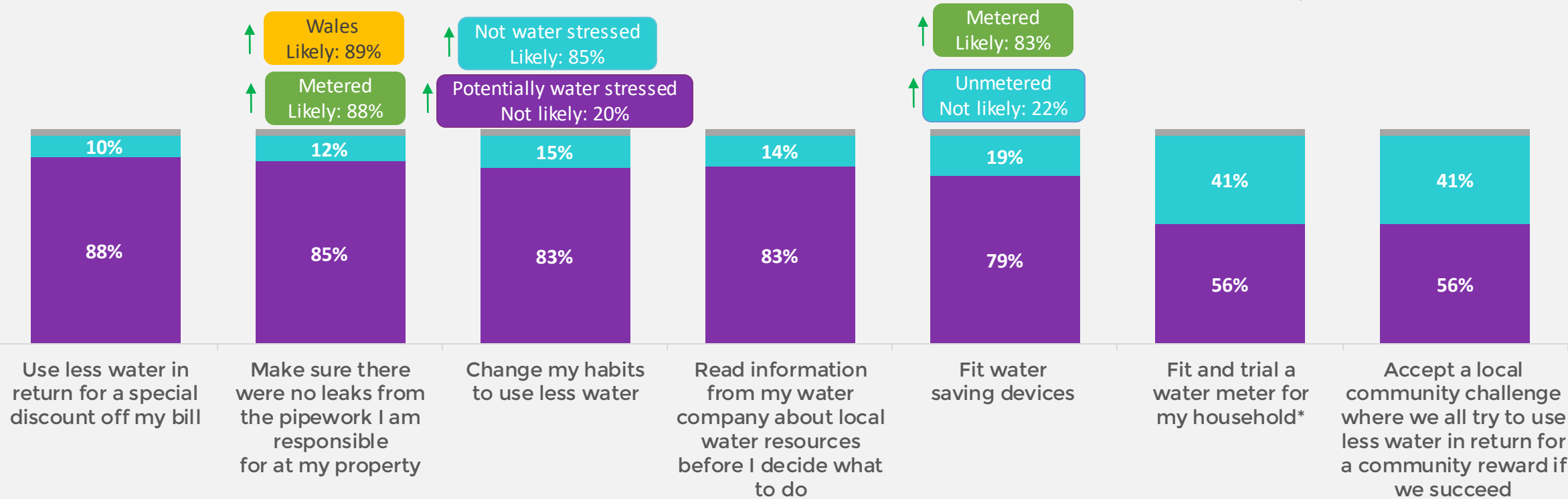
Customers generally show high levels of willingness to use less water; they are least likely to want to help by having a water meter fitted or by joining a community water saving challenge



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Likelihood to help conserve water

- Would not do anything to help
- Not likely (NET)
- Likely (NET)



↑ Significantly higher / lower than the total at 95%

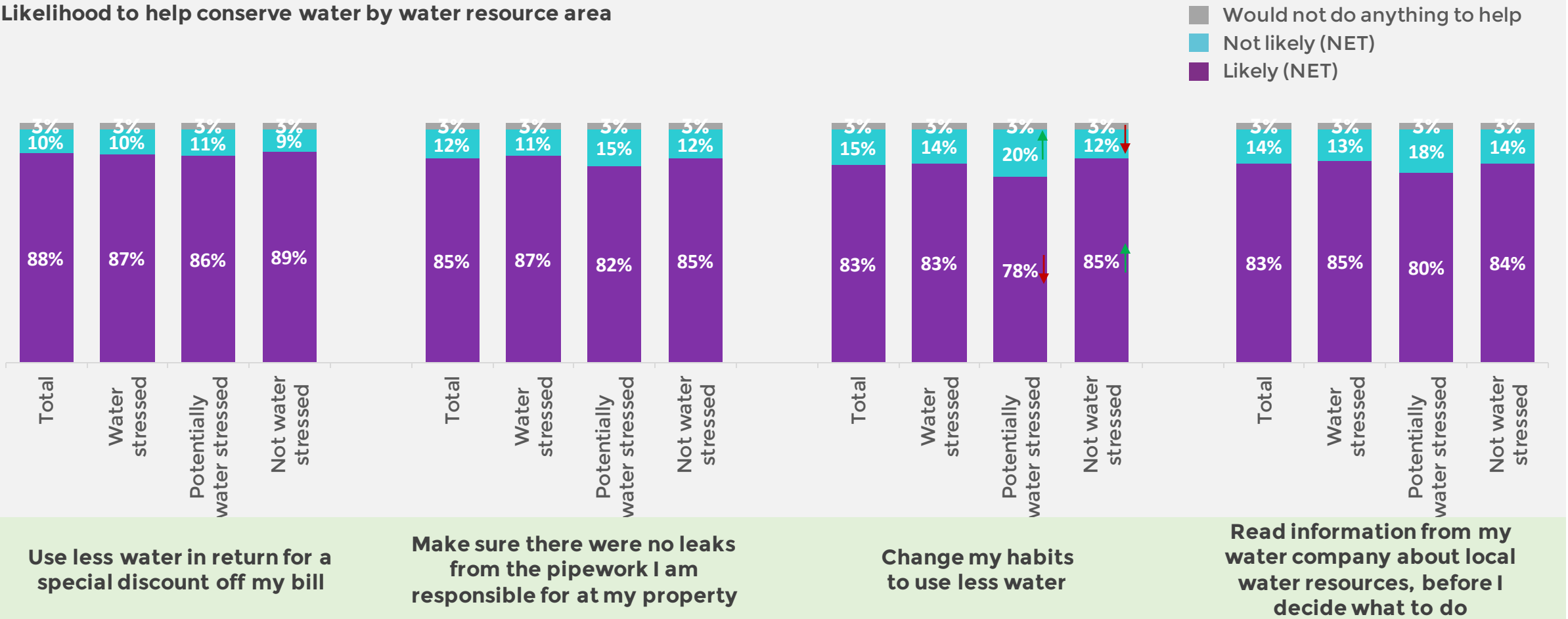
*Question asked of those who do not have a water meter

More than 8 in 10 customers who are not living in water stressed areas are much more likely to change their habits to use less water compared to customers who live in areas that are potentially water stressed or water stressed. Almost 1 in 4 customers living in potentially water stressed areas would not do anything or would be unlikely to help



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Likelihood to help conserve water by water resource area



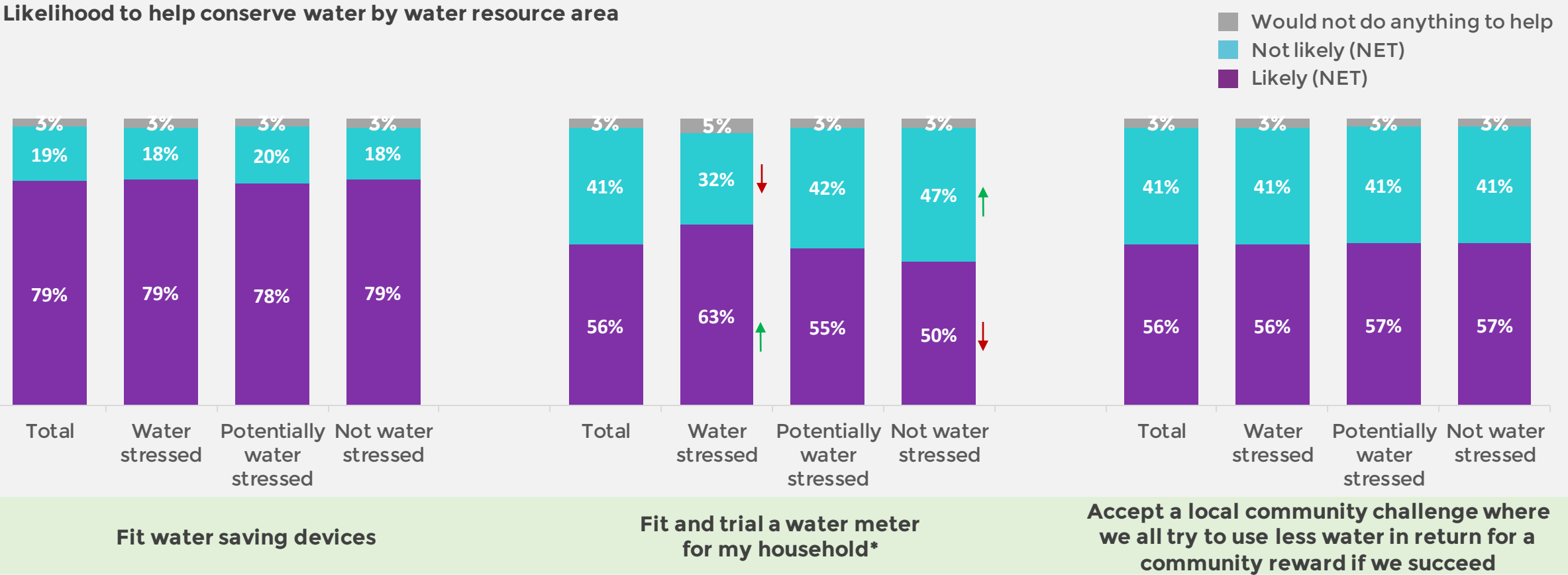
Significantly higher / lower than the total at 95%

Customers who live in water stressed areas are more likely to fit and trial a water meter for their household to help conserve water (63%) than those who are not living in water stressed areas (50%)



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Likelihood to help conserve water by water resource area



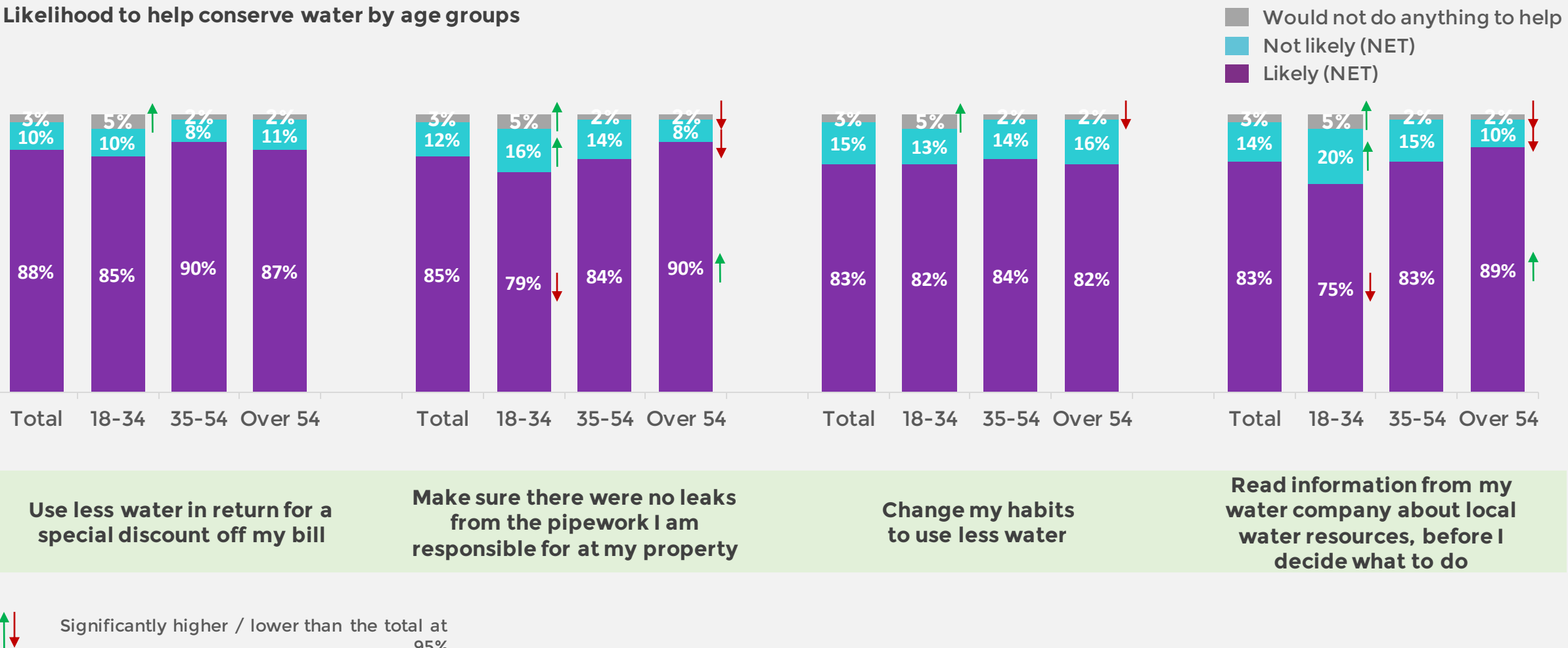
↑ ↓ Significantly higher / lower than the total at 95%

*Question asked of those who do not have a water meter

Customers aged under 35 are less likely to check for leaks on their pipework or read information to help conserve water, compared to those aged 55 and over



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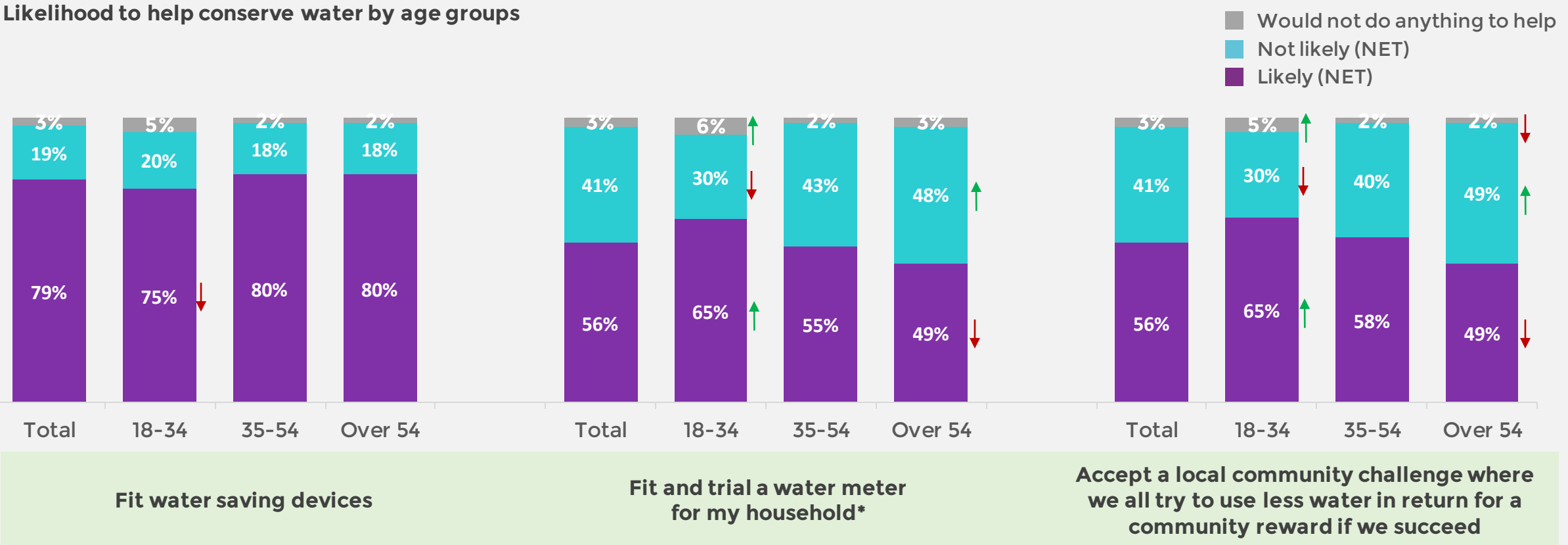


Younger customers aged under 35 are less likely to fit water saving devices than those over 55 to help conserve water, but more likely to trial a water meter or take up a community challenge



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Likelihood to help conserve water by age groups



↑↓ Significantly higher / lower than the total at 95%

*Question asked of those who do not have a water meter

Customers were most likely to use less water in return for a special discount on their bill (88%), followed by making sure there were no leaks in the pipework at their property (85%) (slide 1/2)

Overall, customers aged 18-34 years were more likely than older groups to say that they wouldn't do anything to help water companies conserve water.



Make sure there are no leaks from the pipework I am responsible for at my property



Older customers over 54 are more likely than the average to check for leaks in the pipework at their property (90%), whereas customers aged 18-34 were less likely (79%) to check



Change my habits to use less water



Customers living in areas that are not water stressed are more likely to change their habits to use less water (85%), while those in potentially water stressed areas are less likely (78%)



Read information from my water company about local water resources, before I decide what to do



Customers over the age of 54 (89%) were more likely than younger respondents to make an informed decision after reading information provided by their water company, especially when compared to those aged 18-34 (75%)

Customers who are older are less likely to want to fit and trial a water meter or accept a local community challenge in return for a community reward. Water resource area and household size also has an impact on what customers are willing to do (slide 2/2)



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Customers were least likely to want a water meter fitted on a trial basis to help save water (56%) and accept a local community challenge to try to use less water in return for a community reward if they succeeded (56%)



Fit water saving devices



Those aged 18-34 were significantly less likely to say they would fit water saving devices to help conserve water (75%) when compared to the average (79%)



Fit and trial a water meter for my household



Customers living in water stressed areas are more likely to take part in a water meter trial (63%) compared to customers who are not living in water stressed areas (50%)



Likelihood to fit a trial water meter is significantly higher for households with 18-34s (65%) than 35-54s (55%) and over 54s (49%)



Accept a local community challenge where we all try to use less water in return for a community reward if we succeed e.g., free swimming lessons for local primary school children



Community engagement appeals to younger customers (65% - 18-34s) who were significantly more likely to like this idea and take part than older customers (58% - 35-54s and 49% - over 54s)



The appeal of community engagement increases with the size of the household, with 42% of single person households likely to take part compared to 72% for households with more than 5 occupants



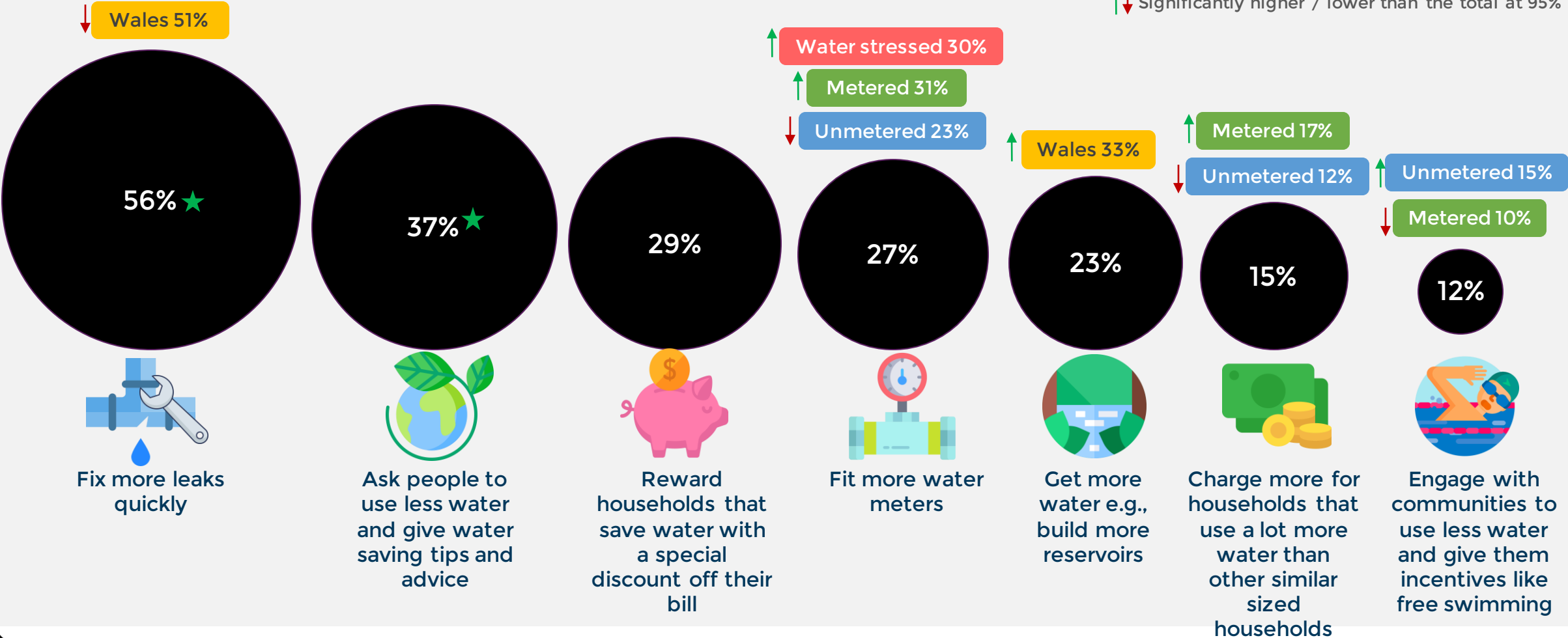
Preferences and expectations for how companies should manage water resources and water for public supply



To help manage water resources, over half of customers expect water companies to fix leaks more quickly and over a third expect them to ask people to use less water and give water saving tips. 1 in 3 also expect companies to offer customers a discount off their bill for saving water

Most important issues – % rank in top 2 (all respondents)

★ Significantly higher than all other lower scoring options at 95%
★ Significantly lower than all other higher scoring options at 95%
↑ Significantly higher / lower than the total at 95%



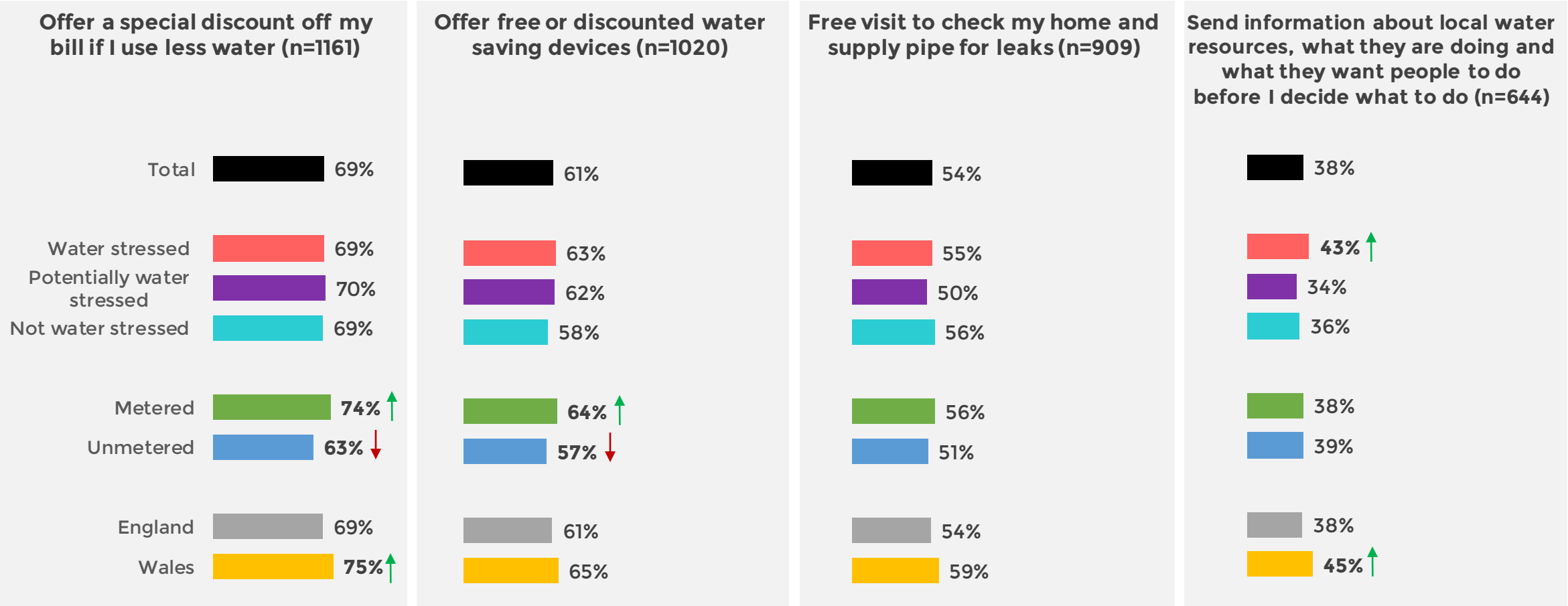
To help them use less water, customers would most prefer water companies to offer them a special discount off the bill (69%), give free or discounted water saving devices (61%), or a free visit to check for leaks (54%) (slide 1 of 2)



% Water company assistance to help customers use less water by subgroup

↑↓ Significantly higher / lower than the total at 95%

Metered customers are more engaged with what their water companies could offer to help save water than unmetered customers

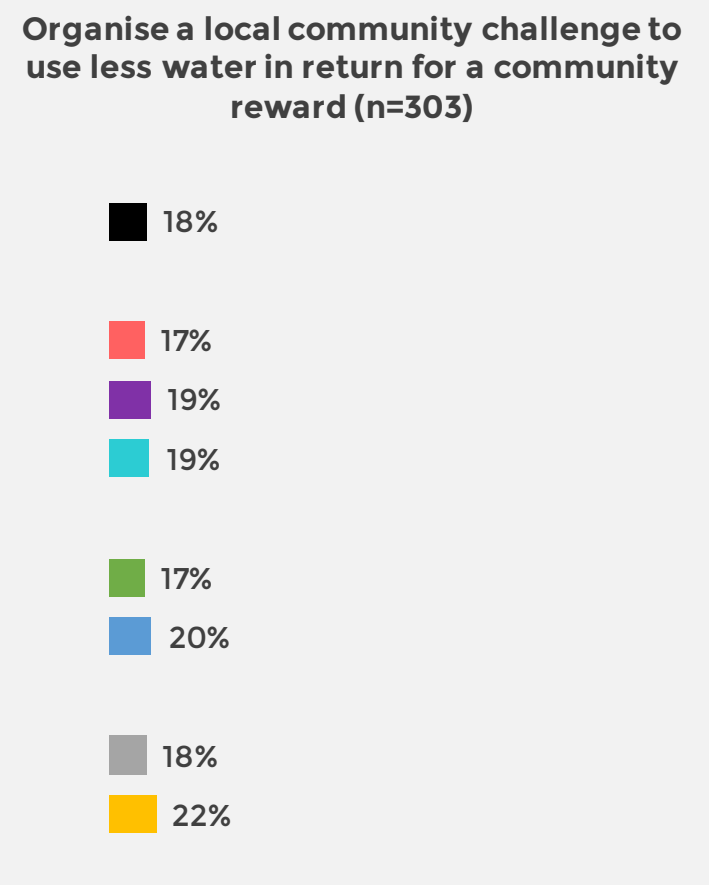
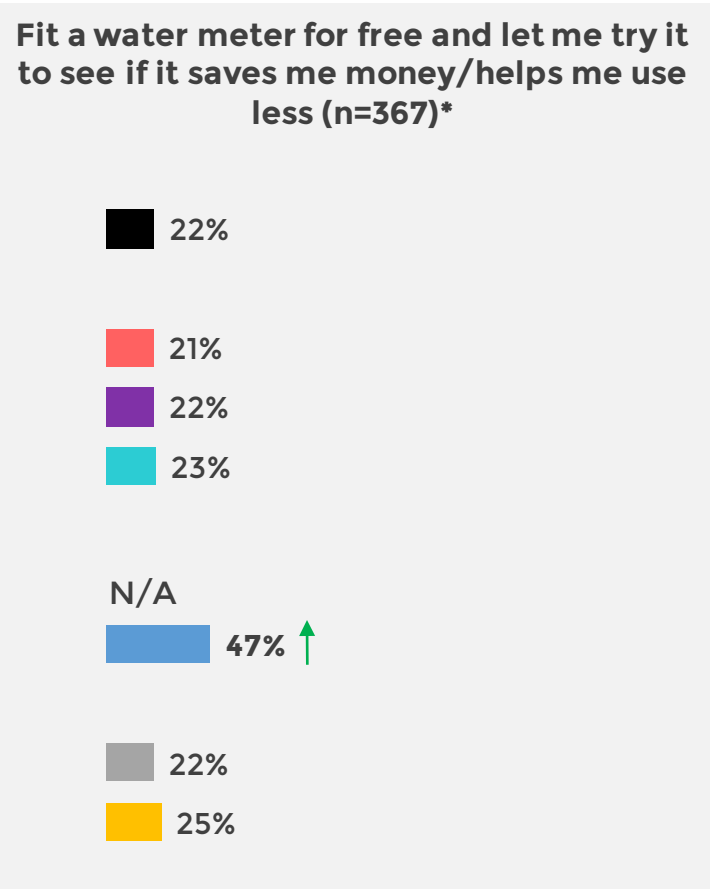
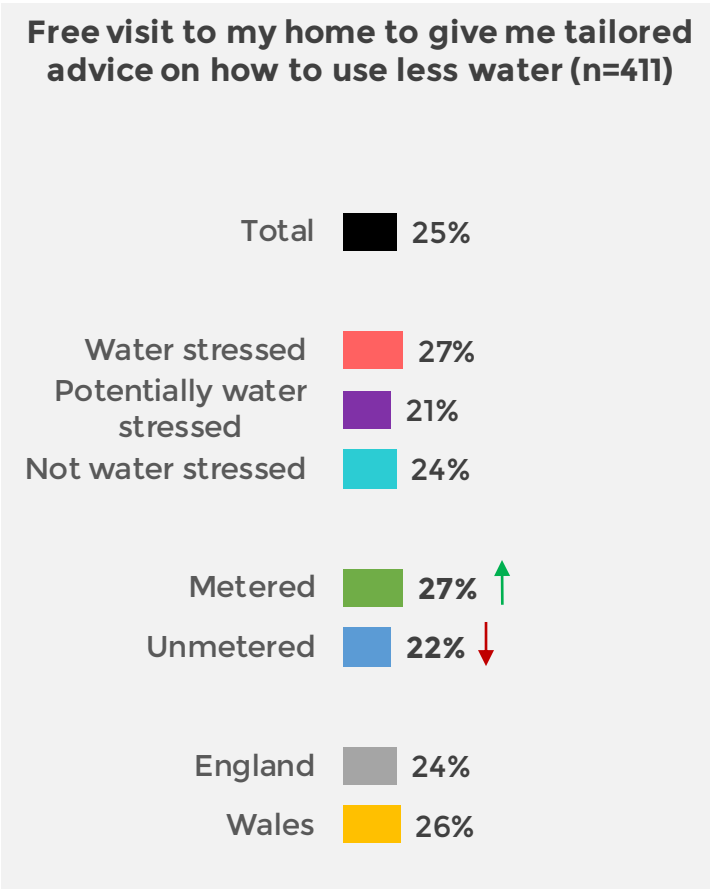


Over a quarter (27%) of metered customers felt that a free home visit to receive tailored advice would help them to use less water and more than 2 in 5 unmetered customers felt that a free water meter trial would be useful (slide 2 of 2)



% Water company assistance to help customers use less water by subgroup

↑↓ Significantly higher / lower than the total at 95%



*Question asked of those who do not have a water meter

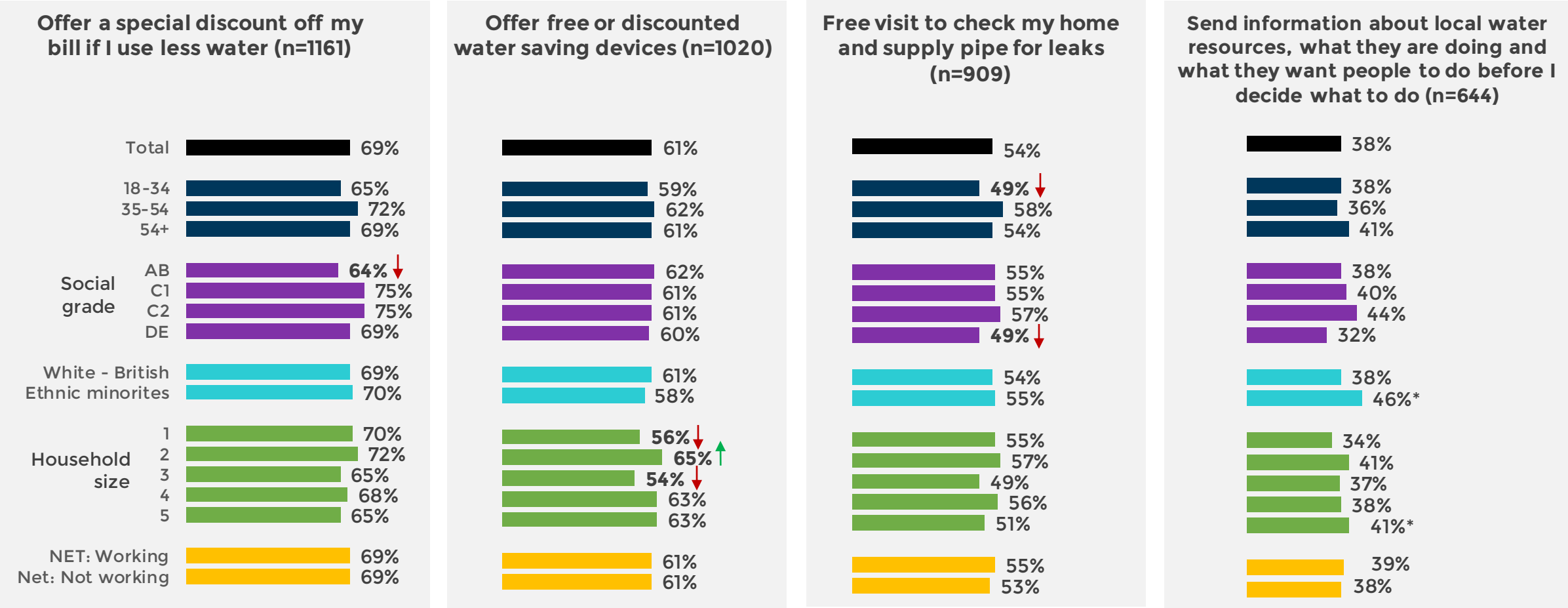
Older customers are slightly more engaged than younger customers, with 18-34-year-olds especially less likely to opt for a free visit to check their home and supply pipe for leaks (49%) (slide 1 of 2)



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% Water company assistance to help customers use less water by subgroup

Significantly higher / lower than the total at 95%
*Caution low base



Older customers are less likely to opt for a free water meter trial to see if it saves money (19%) and 35-54 years are more likely to want water companies to organise community challenges in return for a community reward (23%) (2 of 2)

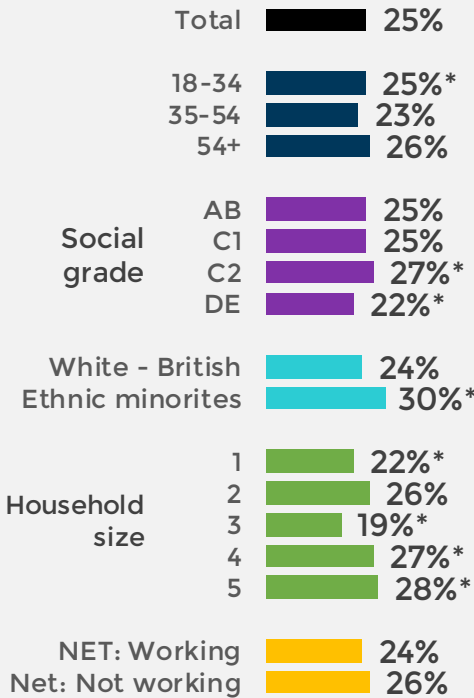


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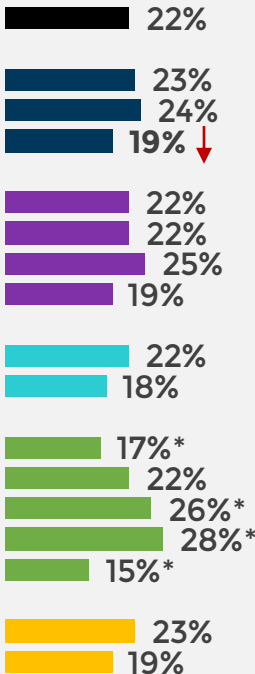
% Water company assistance to help customers use less water by subgroup

Significantly higher / lower than the total at 95%
*Caution low base

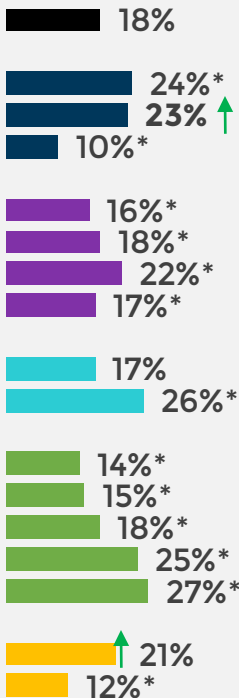
Free visit to my home to give me tailored advice on how to use less water (n=411)



Fit a water meter for free and let me try it to see if it saves me money/helps me use less (n=367)*



Organise a local community challenge to use less water in return for a community reward (n=303)



*Question asked of those who do not have a water meter

Those on higher incomes are less likely than the average income household to save water as a result of a discount on their bill. Age and household size also have an impact on the measures customers are likely to opt for (slide 1/2)

Customers were most likely find a special discount on their bill (69%) as well as free or discounted water saving devices (61%) helpful measures by their water company that would encourage them to save water



Offer a special discount off my bill if I use less water



Those on higher incomes in the AB socio economic group (64%) are less likely than the average income household (69%) to be encouraged to save water if their water company offered a special discount off their bill



Offer free or discounted water saving devices



Free/discounted water saving devices are more likely to appeal to customers from a two-person household (65%) compared to the average (61%), and less likely to appeal to those from a single-person household (56%) or three-person household (54%)



Free visit to check my home and supply pipe for leaks



Younger respondents aged 18-34 (49%) were less likely than the average (54%) to opt for a free visit from their water company to check their home and supply pipe for leaks

Older, unmetered customers over 54 are less likely than the average to be interested in a free water meter for trial as well a local community challenge organised by their water company (slide 2/2)



Customers were least likely to want water companies to install a free water meter for trial (22% - specifically unmetered customers) and organise local community challenges (18%). There were no significant differences between subgroups amongst customers that were likely to opt for information about local water resources (38%)



Free visit to my home to give me tailored advice on how to use less water



Metered customers (27%) are more likely than unmetered customers (22%) to want a free visit to their home to receive tailored advice on how to use less water



Fit a water meter for free and let me try it to see if it saves me money/helps me use less



Those over the age of 54 (19%) are less likely than the average (22%) to opt for a free trial for a water meter that would allow them to test its effectiveness



Organise a local community challenge to use less water in return for a community reward



Customers aged 35-54 (23%) are more likely than the average (18%) to be interested in a local community challenge organised by their water company

Working individuals (21%) are also more likely to be interested in local community challenges, when compared with those who do not work (12%)

Customers are more willing to use less water if they receive a special discount off their bill (88%) which is also the top preference in how they want water companies to assist them (69%). This shows that offering this incentive is more likely to encourage customers to change their behaviour to conserve water



The smaller the gap between the preference for water companies to offer assistance and the customer appetite for this assistance, the more likely customers are to change their behaviour if water companies were to offer this incentive.

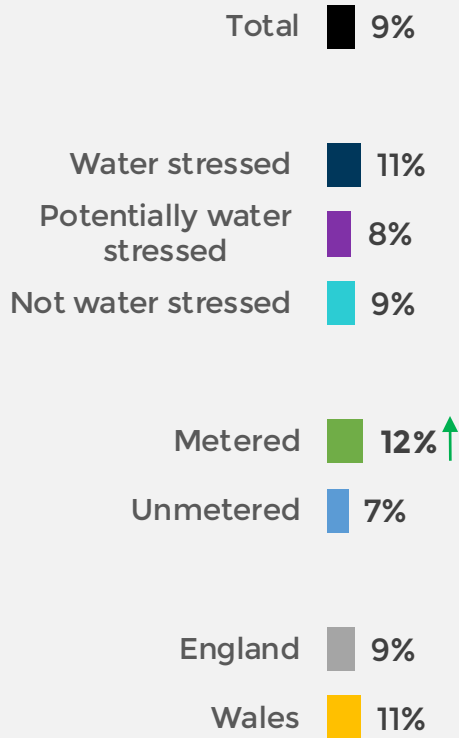
(Q8) Customer appetite to help to conserve water		(Q9) Preference for water company assistance to help customers conserve water		Gap (between customer appetite to conserve water and preference for water company assistance)
Likely (NET)		Preference		
Use less water in return for a special discount off my bill	88%	Offer a special discount off my bill if I use less water	69%	19
Make sure there were no leaks from the pipework I am responsible for at my property	85%	Free visit to check my home and supply pipe for leaks	54%	31
Change my habits to use less water	83%	Free visit to my home to give me tailored advice on how to use less water	25%	58
Read information from my water company about local water resources before I decide what to do	83%	Send information about local water resources, before I decide what to do	38%	45
Fit water saving devices	79%	Offer free or discounted water saving devices	61%	18
Fit and trial a water meter for my household*	56%	Fit a water meter for free and let me try it to see if it saves me money/helps me use less	22%	34
Accept a local community challenge where we all try to use less water in return for a community reward	56%	Organise a local community challenge to use less water in return for a community reward	18%	38

Awareness of social media campaigns to save water



Less than 1 in 10 recall seeing water saving tips on social media in the last year with those on water meters more likely to recall them

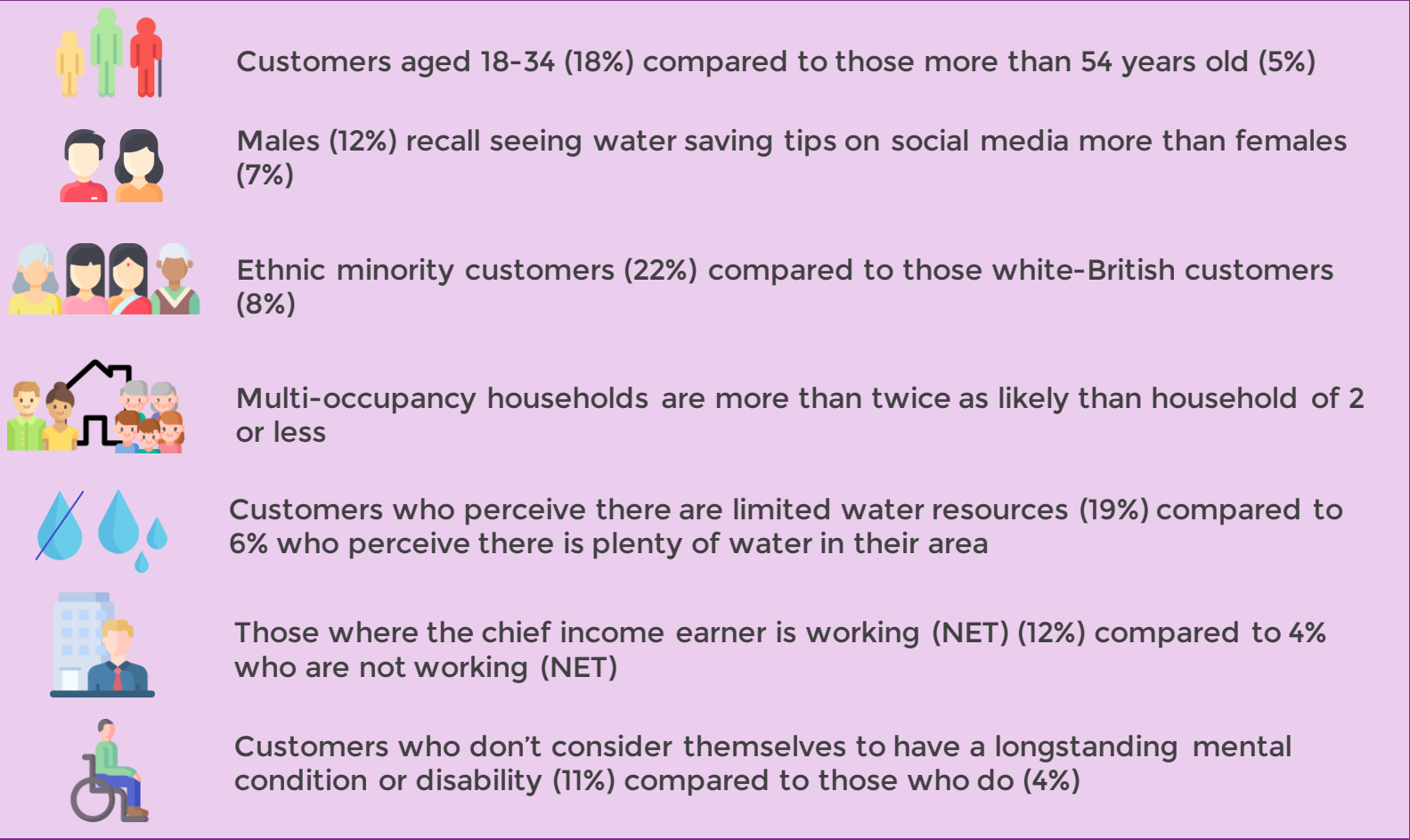
% who recall having seen water saving tips on social media



↑ Significantly higher / lower than the total at 95%



Types of customers that are more likely to recall seeing water saving tips on social media:



Most social media messages are from water companies advertising water saving tips on Facebook, Twitter and YouTube



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Respondents spontaneously mention social media such as **Facebook, Twitter and YouTube** as places that they've seen **adverts for water saving tips**, which mostly come from water companies but a few mentioned other places such as **WWF, Money Saving Expert**. Advertisements range from **water saving tips, money saving advice, community challenges and offers for water saving devices**:

“ Social media information on how much water is used every time we flush a toilet or take a shower/bath, and suggestions on an optimal length of shower for water use and hygiene ”

“ Anglian Water advertised a link to their website for tips on how to save water in the home ”

“ It was from Martin Lewis Money Saving advice. There was a link to my water supplier where I could claim free water saving devices. ”

“ WWF to use water from washing fruits and veggies to water plants ”

“ Thames Water offering airing device for taps and shower heads. ”

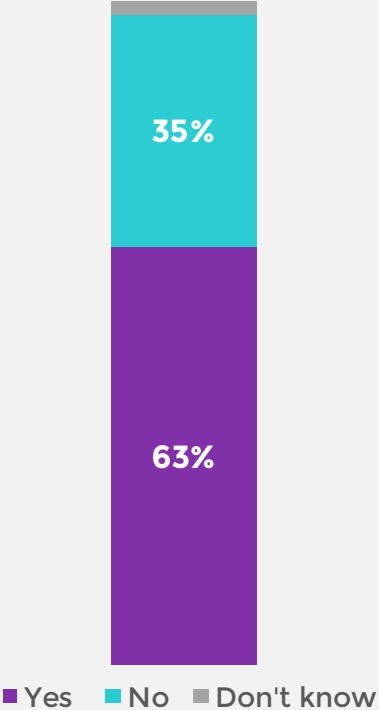
“ Yorkshire water challenges our community to use less water ”

“ From Anglian Water- suggesting using a float in the toilet system to reduce the amount of water used each time it flushed Turn taps off while brushing teeth and preparing vegetables ”

“ We had a visit from a representative of Affinity Water to check our usage and suggest ways to conserve water such free shower heads, tiers and hippos. We also have a water meter and this year they noticed an increase in our usage and asked if we could explain why in case there was a leak ”

Just over 6 in 10 claim to have take action after seeing water saving tips on social media and are more conscious of not wasting water

% doing anything different after seeing water saving tips on social media



As a result of the water saving tips on social media respondents spontaneously mention specific examples such as **taking showers instead of having baths**, **conserving and reusing water for watering the garden or flushing toilets**, many use **water saving devices** and **turn off taps** as a result of the advertisements and some are more conscious of not wasting water

“Using the devices and fixtures provided to me.”

“Using the Washing Up Water on the Garden.”

“After watching videos from YouTube, I always make sure I turn off the water tap. I wash my clothes when the washing machine is full.”

“Using the shower rather than taking a bath because there is less water consumption and much cheaper”

“I use a bucket to catch the water from the shower head until the water runs hot and use this to water the garden. I had a Camel shower head fitted which uses much less water. The spare Camel head I gave to my son-in-law to fit on their shower to save water. I use a kettle of water to wash up crockery instead of running the hot water.”

“Using it when needed and keeping an eye on the water flow”

“I have a water butt that I collect water to water my garden and a water saving device in the toilet.”

“Using a more efficient water saving shower head with an egg timer. Reducing the capacity of the toilet system to flush less water.”

↑↓ Significantly higher / lower than the total at 95%

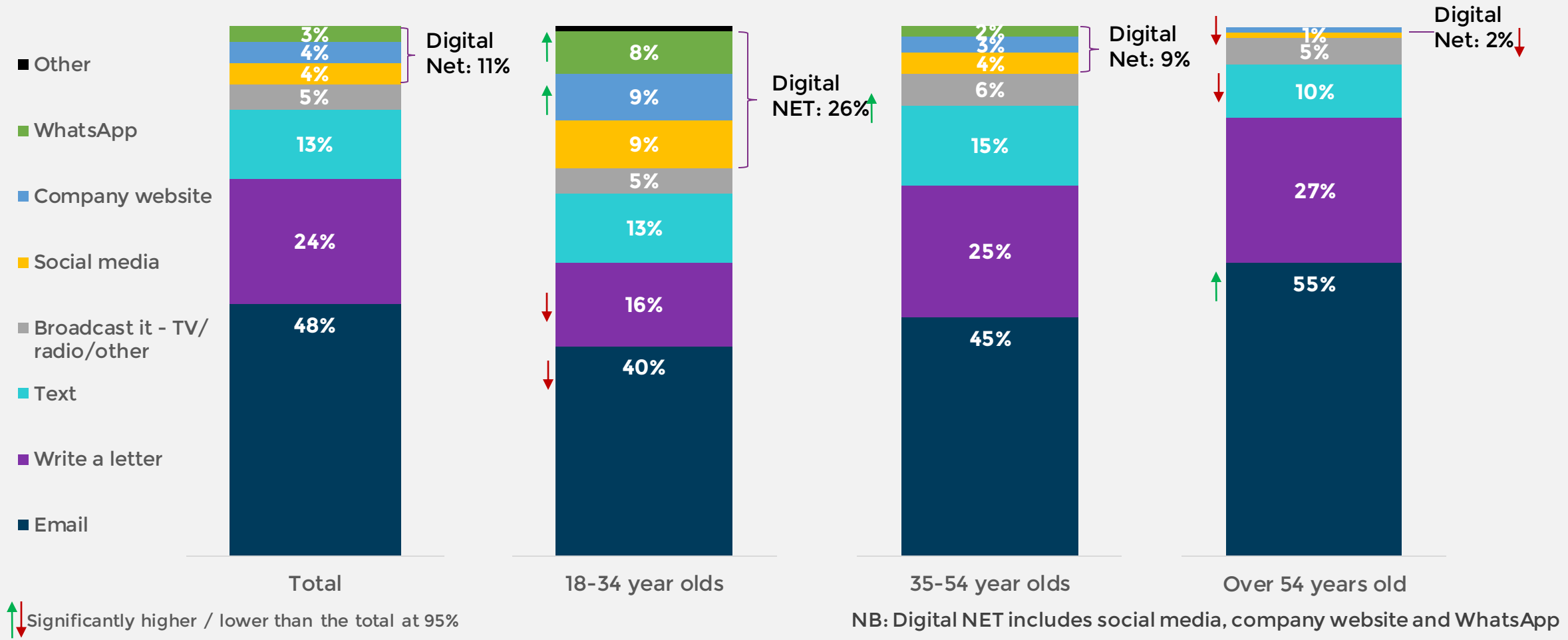
If their water company wanted to let customers know about something important, the best way is by email; however younger customers under 35 are more likely to prefer flexible digital channels than older age groups



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Preference on important communication method – % ranked 1st

No significant differences found by water resource area or metered or unmetered



Views on water company supply pipe leak repair policies

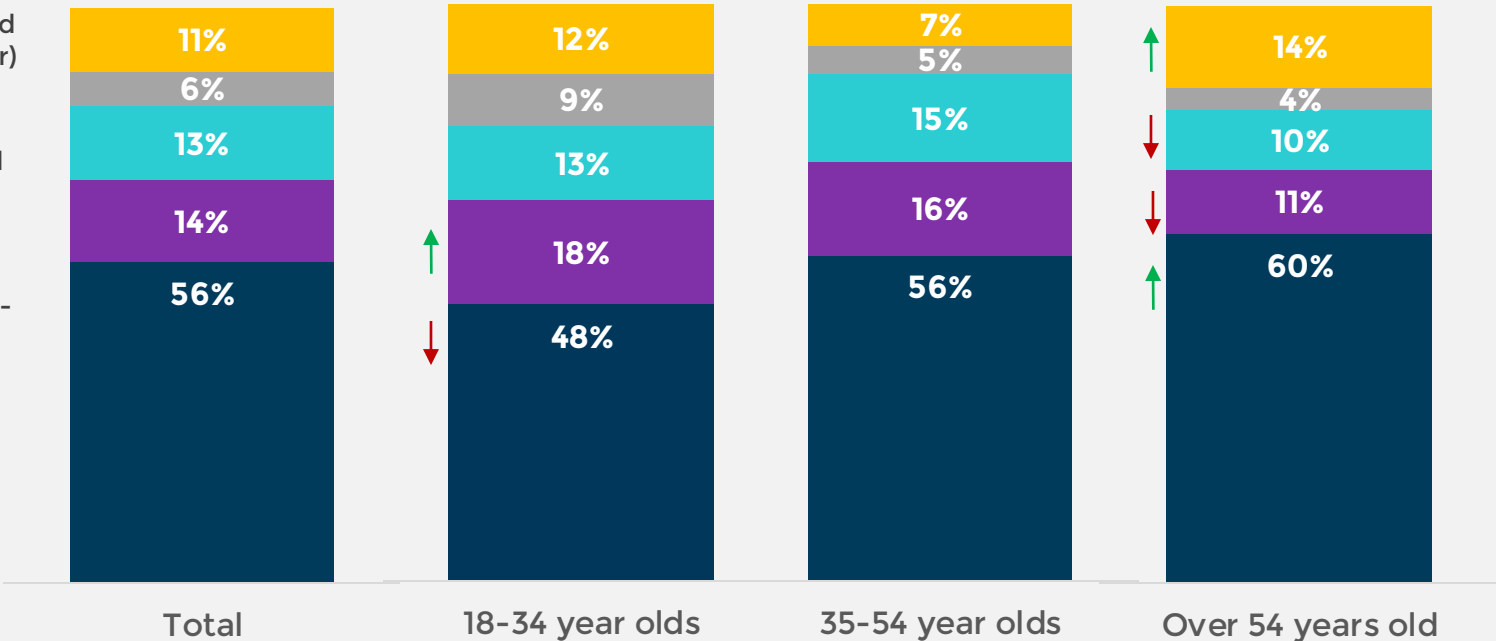


The preferred customer supply pipe leakage policy is for the first leak to be repaired for free and show how to check for leaks in future (56%). However preference on the type of assistance differs by age group.

Preference for type of assistance from water companies when there's a leak from the supply pipe on their property

- Preference on the type of assistance differs by age;
- Customers under 35 are less likely than older age groups to want the leak to be repaired for free and then shown how to check for future leaks but more likely to offer to pay for part of the costs if the pipe needs replacing
 - Customers older than 54 years old would prefer to choose who does the repair and either pay for the work themselves or through their insurance. They are also less likely than customers under 35 to offer to pay for part of the costs if the pipe needs replacing and less likely to prefer water companies to offer comprehensive help to people in vulnerable circumstances

- None of these - I'd rather choose who does the work and pay for it (either myself or through my insurance provider) to make sure it is done to the standard I expect
- Give me a list of approved plumbers/ contractors to call to find and repair the leak at my cost
- Offer comprehensive help but only to people in vulnerable circumstances such as those living with long-term health conditions or who struggle to afford their water
- If the pipe needs replacing, offer to pay for part of the costs (costs could amount to several hundreds of pounds)
- Repair the first leak for free and show me how to check for leaks in future



Significantly higher / lower than the total at 95%

No significant differences found by region, water resource area and whether metered or unmetered

9 out of 10 agree that help with leaks should be the same across all water companies; this falls slightly if help might be 'less' than now



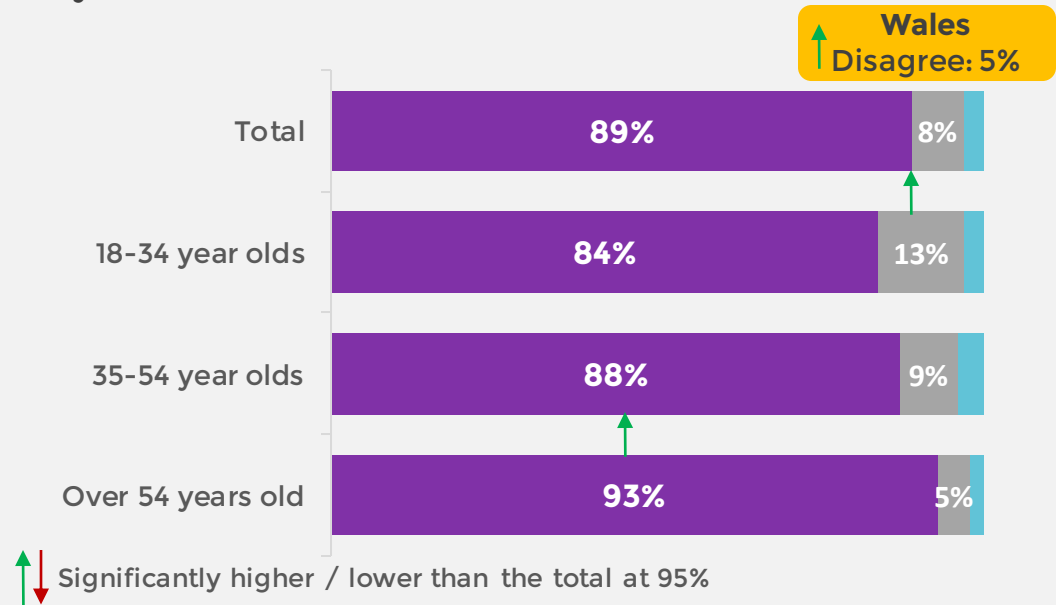
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% Agreement that help from water companies should be consistent across all

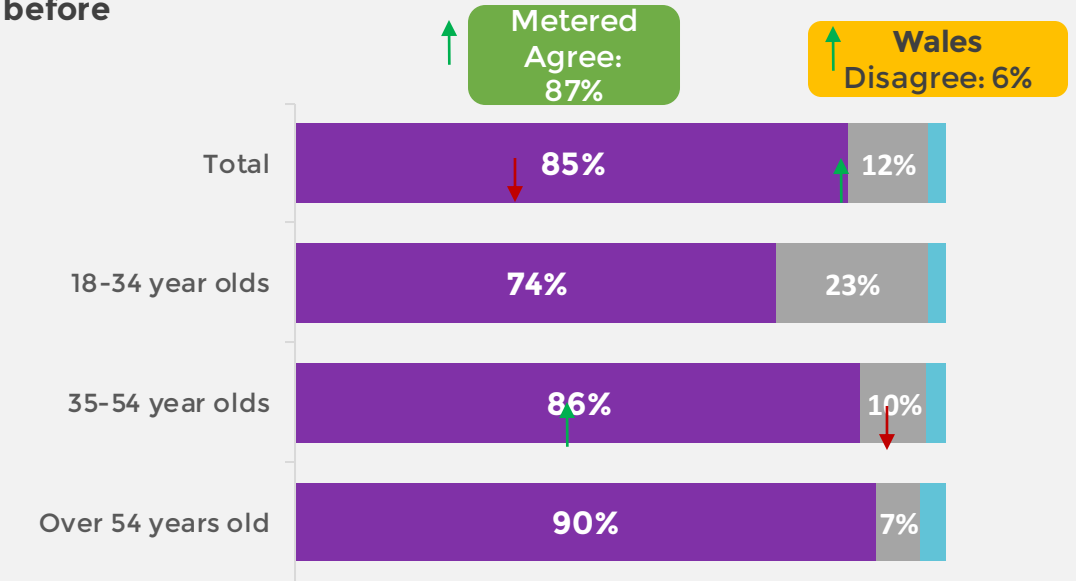
NET: Agree Neither agree nor disagree NET: Disagree

- Preference on the type of assistance differs by age;
- Those aged over 54 years old are more likely to agree that water companies should offer the same help to all customers with leaks, regardless of where they live, whilst younger age groups are more likely to be indifferent to the kind help offered to all customers
 - If offering the same help to all customers means a change in the kind of help some customers currently receive, then younger age groups are less likely to agree that help should be the same for all customers and are more likely to be indifferent, whereas older age groups are more likely to agree with this

Every water company should offer the same help to all customers with leaks on customer water supply pipes, regardless of where they live



The same level of help should be offered to all customers - even if it means a change in the kind of help to make it the same for everyone and some customers may get more or less help than before

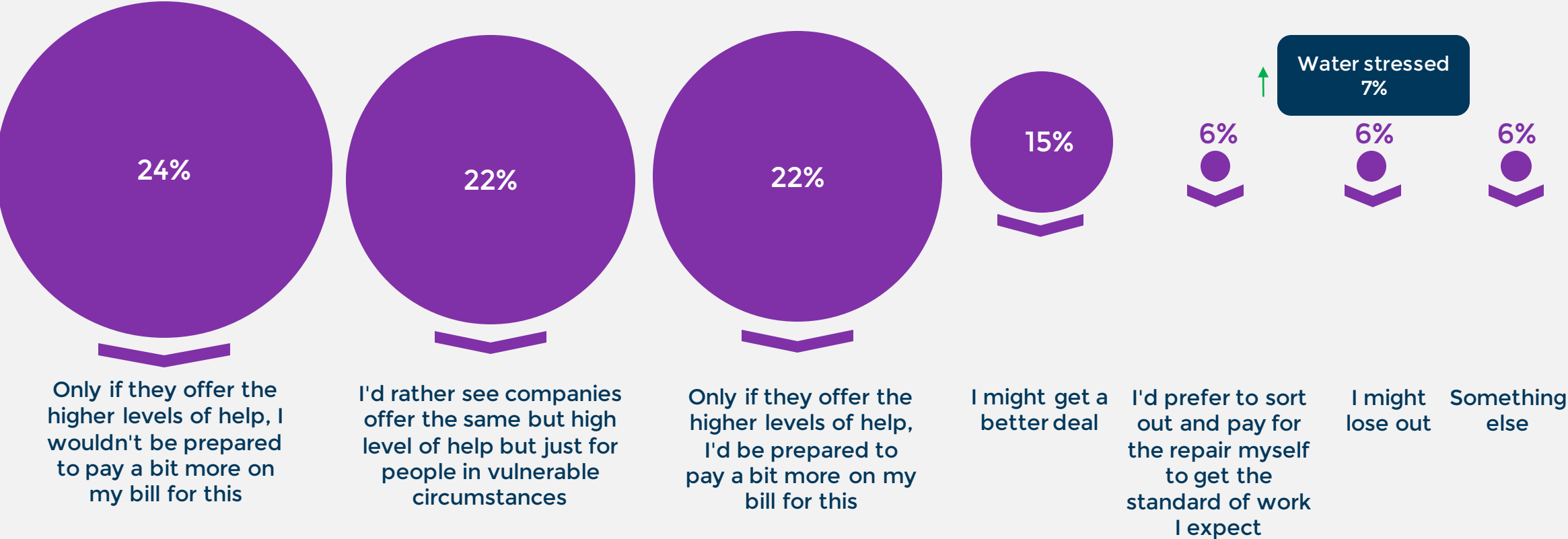


Amongst those who felt that help should be consistent across water companies, there were mixed views as to how this should be done



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Main reasons for those in agreement that water supply pipes help should be offered to all customers



Significantly higher / lower than the total at 95%



Conclusions



Conclusions

- **Overall, there is low public awareness of the water resources situation in England and Wales.** Half of respondents believe water is plentiful where they live, although large parts of England are now classified as being ‘seriously water stressed’, by the Environment Agency*.
- **Perceptions of the availability of water resources are not generally well informed.** Over two-fifths of respondents said this isn’t something they know about. When people gave specific reasons, those who said water resources are plentiful are most likely to say this is because it rains/floods a lot. And, those who said water resources are limited where they live say this is because they are likely to have seen requests from their water company to use less water. Water companies have an important role in informing customers.
- **If customers know they live in an area where water resources are limited, there are high levels of willingness to reduce water use in a number of ways.** But, having a meter fitted or taking part in a community challenge to reduce water use in exchange for a community reward were the least favoured options. However, those living in a water stressed areas are more likely to be willing to conserve water by fitting a water meter, than those who live in not water stressed areas.
- **Metered customers are more likely to help to reduce their water use, compared to unmetered customers.** This includes checking for leaks in their property or fitting water saving devices.

Conclusions

- **Customers who live in areas where water resources are limited or under pressure would like water companies to take action to help manage water resources.** The top three actions water companies should take are: fix more leaks, ask people to use less water and give water saving help and advice, and reward customers who reduce their water use with a special discount off their bill.
- **Customer preferences for what water companies do are affected by whether they are metered or not.** Metered customers are more likely to prefer their company to fit more meters or charge more for households that use a lot more water than similar sized households, when compared to the views of unmetered customers.
- **Awareness of social media campaigns to save water is very low.** Only one in ten customers recall seeing water saving tips on social media. Metered customers are more likely to recall these messages than unmetered customers.
- **There is a high level of agreement amongst customers that water companies should (in principle) offer the same level of help to customers with supply pipe leaks.** This was even when customers were made aware that companies do not offer help in a consistent way, and if a consistent level of help were to be implemented some customers could get less help than before.

Appendix



Weighting profiles (1)

- The results of this report have been weighted based upon the UK 2011 Census profile for England and Wales combined. Rim weighting was applied for age, gender, government office region, social grade, taken a foreign holiday in the last 3 years, number of cars in the household and working status. The boost conducted in Wales has had rim weighting applied to weight the data down to be representative of Wales and tenure has been weighted to represent the profile of each nation. The weighting efficiency of using these weights are 72%.
- The Office of National statistics carry out a census every ten years to collect population data from each household in England and Wales via an online or postal survey. Population estimates are then made to predict the future demographic profile of England and Wales until the next census data is available. Although the UK 2011 Census data provides us with robust population statistics and is widely used source, it is a snapshot of the population at that time and therefore over the course of the decade, some demographic data can become outdated.
- An alternative to the UK census data is the Publishers Audience Measurement Company (PAMCo) data (www.pamco.co.uk). PAMCo is the governing body which oversees audience measurement for the published media industry. They are responsible for the new joint industry currency (JIC) called PAMCo – Audience Measurement for Publishers in place of National Readership Survey data.
- PAMCo is based on a continuous survey of 35,000 people which takes place 12 months of the year, 7 days a week. Up to two individuals aged 15 plus from randomly selected addresses are invited to take part either by online or paper self-completion questionnaire. Those who do not complete an online questionnaire or paper self-completion questionnaire are invited to take part with a field facilitator recruiting participants to complete the survey. Prior to the COVID-19 pandemic PAMCo was entirely based upon a face-to-face methodology.

Weighting profiles (2)

- PAMCo is highly reputable and is used by a wide range of companies. We find that the PAMCo data is more accurate and reliable because their data covers a wide range of demographics and is updated annually, whereas the profiles of the census data are outdated. When comparing the demographics profiles between the data used in this report and PAMCo, we can see there are differences especially between age groups.

	PAMCo	Data tables	PAMCo	Data tables
	England		Wales	
Gender				
Male	49%	51%	49%	45%
Female	51%	49%	51%	55%
Age				
18-34	28%	25%	25%	12%
35-54	33%	37%	31%	47%
55+	39%	38%	44%	41%
Social Grade				
ABC1	56%	56%	54%	59%
C2DE	44%	44%	46%	41%
Ethnicity				
White	85%	87%	96%	95%
BAME	15%	12%	4%	5%
Home Ownership				
Owner	69%	65%	73%	67%
Renter	31%	34%	27%	31%
Working status				
Working	58%	49%	49%	55%
Unemployed	42%	51%	51%	45%

Differences between England and Wales: Total sample (1 of 2)



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Question	Total	England	Wales
Q4. To what extent do you think the area where you live has limited water resources?			
To some extent (NET) (is limited)	32%	32%	19%
Q5. You said that the area where you live has [limited/ plenty of water/ don't know if water resources where you live are limited or not], which ONE of the following are reasons for that?			
It's not something that I really know about	43%	43%	30%
It rains/floods a lot in my area	18%	16%	48%
Don't know	10%	10%	4%
I've seen messages from my water company asking people to use less water	9%	9%	5%
My water company fitted a water meter for my home because of local water resource issues	3%	3%	1%
I've been affected by a hosepipe ban	3%	3%	1%
Q6. If you knew that you lived in an area where water resources were limited , and there was a risk in the future of more hosepipe bans and restrictions on water use, what would you expect your water company to do to help manage this situation? - NET: Top 2 preference			
Fix more leaks, more quickly	56%	57%	51%
Get more water e.g. build reservoirs, transfer water from areas that have more water to go around	23%	23%	33%
Q7. Have you heard of your water company doing any of the following things?			
None of these	53%	52%	62%
Asking people to use less water and giving water saving tips and practical advice to save water	28%	29%	19%
Doing more to fix leaks, more quickly	19%	20%	15%



Differences between England and Wales: Total sample (2 of 2)

Question	Total	England	Wales
Q16. To what extent do you agree or disagree that every water company should offer the same help to all customers with leaks on customer water supply pipes? This would mean that where someone lived wouldn't make a difference to the help they could get.			
Disagree (NET)	3%	3%	5%
Q17. Some water companies offer more help than others. For example, help can be sending a list of approved plumbers/contractors to repairing the first leak free, or offering part payment towards the repair or replacing the old pipe with a new pipe. If help was the same across England and Wales there would be winners and losers. For example, if the help provided was sending a list of plumbers this would be a lower level of help for many customers, or if it was a free repair this would be an improvement for many customers. With this in mind, to what extent do you agree or disagree that every water company should offer the same help with leaks on customer water supply pipes?			
Disagree (NET)	3%	3%	6%

Differences between metered and unmetered: Total sample (1 of 4)



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Llais defnyddwyr dŵr

Question	Total	Metered	Unmetered
Q4. To what extent do you think the area where you live has limited water resources?			
To some extent (NET) (is limited)	32%	35%	29%
Don't know	18%	16%	18%
Q5. You said that the area where you live has [limited/ plenty of water/ don't know if water resources where you live are limited or not], which ONE of the following are reasons for that?			
It's not something that I really know about	43%	44%	48%
It rains/floods a lot in my area	18%	17%	23%
I've seen messages from my water company asking people to use less water	9%	11%	9%
Heard it from my water company	7%	9%	6%
Q6. If you knew that you lived in an area where water resources were limited , and there was a risk in the future of more hosepipe bans and restrictions on water use, what would you expect your water company to do to help manage this situation? - NET: Top 2 preference			
Fit more water meters so that people know how much they use and pay accordingly	27%	31%	23%
Charge more for households that use a lot more water than other similar sized households	15%	17%	12%
Engage with local communities to help them use less water and give them incentives like free swimming lessons for school children if they save water	12%	10%	15%



Differences between metered and unmetered : Total sample (2 of 4)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Total	Metered	Unmetered
Q7. Have you heard of your water company doing any of the following things?			
None of these	53%	45%	60%
Asking people to use less water and giving water saving tips and practical advice to save water	28%	34%	22%
Fitting more water meters so that people know how much they use and pay accordingly	19%	22%	16%
Doing more to fix leaks, more quickly	19%	23%	16%
Q8. If you lived in an area with limited water resources, what would you be likely or unlikely to do to help?			
Fit water saving devices e.g. water butts, bricks to reduce the amount of water flushed in toilets, water saving showerheads			
Likely (NET)	79%	83%	75%
Not likely (NET)	19%	15%	22%
Nothing	3%	2%	3%
Use less water in return for a special discount off my bill			
Nothing	3%	2%	3%
Accept a local community challenge where we all try to use less water in return for a community reward if we succeed e.g. free swimming lessons for local primary school children			
Nothing	3%	2%	3%



Differences between metered and unmetered : Total sample (3 of 4)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Total	Metered	Unmetered
Q9. Which, if any, of the following could your water company do to help you to use less water?			
Offer a special discount off my bill if I use less water	69%	74%	63%
Offer free or discounted water saving devices e.g. water butts, bricks to reduce the amount of water flushed in toilets, water saving showerheads and tap aerators	61%	64%	57%
Free visit to my home to give me tailored advice on how to use less water	25%	27%	22%
Q10. In the last year, have you seen any water saving tips on social media? e.g. Twitter, Facebook, Instagram or anywhere else online.			
Yes	9%	12%	7%
No	83%	82%	86%
Q15. Water companies, at their discretion, offer various ways to help customers who find they have a leak from the supply pipe on their property.			
Offer comprehensive help but only to people in vulnerable circumstances such as those living with long-term health conditions or who struggle to afford their water bill	13%	11%	15%
Q16. To what extent do you agree or disagree that every water company should offer the same help to all customers with leaks on customer water supply pipes? This would mean that where someone lived wouldn't make a difference to the help they could get.			
Agree(NET)	85%	87%	83%



Differences between metered and unmetered : Total sample (4 of 4)



Question	Total	Metered	Unmetered
Q17. Some water companies offer more help than others. For example, help can be sending a list of approved plumbers/contractors to repairing the first leak free, or offering part payment towards the repair or replacing the old pipe with a new pipe. If help was the same across England and Wales there would be winners and losers. For example, if the help provided was sending a list of plumbers this would be a lower level of help for many customers, or if it was a free repair this would be an improvement for many customers. With this in mind, to what extent do you agree or disagree that every water company should offer the same help with leaks on customer water supply pipes?			
Agree (NET)	80%	83%	77%
Neither agree nor disagree	11%	9%	13%

Differences between water resource area : Total sample (1 of 3)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Total	Water stressed	Potentially water stressed	Not water stressed
Q4. To what extent do you think the area where you live has limited water resources?				
To some extent (NET) (is limited)	32%	39%	29%	25%
Not affected at all there is plenty of water	50%	41%	53%	58%
Q5. You said that the area where you live has [limited/ plenty of water/ don't know if water resources where you live are limited or not], which ONE of the following are reasons for that?				
It's not something that I really know about	43%	49%	53%	41%
It rains/floods a lot in my area	18%	11%	15%	30%
I've seen messages from my water company asking people to use less water	9%	13%	8%	8%
I've been affected by a hosepipe ban	3%	4%	3%	2%
My water company fitted a water meter for my home because of local water resource issues	3%	4%	3%	2%
Q6. If you knew that you lived in an area where water resources were limited , and there was a risk in the future of more hosepipe bans and restrictions on water use, what would you expect your water company to do to help manage this situation? - NET: Top 2 preference				
Fit more water meters so that people know how much they use and pay accordingly	27%	30%	26%	25%
Engage with local communities to help them use less water and give them incentives like free swimming lessons for school children if they save water	12%	9%	14%	14%



Differences between water resource area : Total sample (2 of 3)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Total	Water stressed	Potentially water stressed	Not water stressed
Q7. Have you heard of your water company doing any of the following things?				
None of these	53%	49%	52%	56%
Asking people to use less water and giving water saving tips and practical advice to save water	28%	32%	26%	26%
Fitting more water meters so that people know how much they use and pay accordingly	19%	24%	14%	17%
Q8. If you lived in an area with limited water resources, what would you be likely or unlikely to do to help?				
Fit and trial a water meter for my household				
Likely (NET)	56%	63%	55%	50%
Not likely (NET)	41%	32%	42%	47%
Change my habits to use less water				
Likely (NET)	83%	83%	78%	85%
Not likely (NET)	15%	14%	20%	12%
Q9. Which, if any, of the following could your water company do to help you to use less water?				
Send me information about local water resources, what they are doing and what they want people to do before I decide what to do	38%	43%	34%	36%



Differences between water resource area : Total sample (2 of 3)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Total	Water stressed	Potentially water stressed	Not water stressed
Q14. If your water company needs to get in touch about something important - for example about ways to reduce your water bill, a leak in your pipes, or problems with your water supply - what's the best way to make sure you notice this information? (Ranked 1st)				
Write a letter	24%	24%	18%	26%
Text	13%	10%	16%	13%
Company website	4%	5%	3%	3%
Q17. Some water companies offer more help than others. For example, help can be sending a list of approved plumbers/contractors to repairing the first leak free, or offering part payment towards the repair or replacing the old pipe with a new pipe. If help was the same across England and Wales there would be winners and losers. For example, if the help provided was sending a list of plumbers this would be a lower level of help for many customers, or if it was a free repair this would be an improvement for many customers. With this in mind, to what extent do you agree or disagree that every water company should offer the same help with leaks on customer water supply pipes?				
Neither agree nor disagree	11%	10%	16%	11%
Q18. You said that you strongly agree/agree that every water company should offer the same help with leaks on customer water supply pipes. Which ONE of the following is your reason for this?				
I might lose out	6%	7%	4%	4%



Water Resources - questionnaire (1 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
SINGLE CODE Q1. Do you pay the water bill for your household, either by yourself or jointly with someone else?	1	Yes, solely
	2	Yes, jointly
	3	No, I do not pay the water bill [exclude]
SINGLE CODE Q2. Which water company provides your water services?	1	Water stressed: Thames Water, Southern Water, Affinity Water, Anglian Water (East Anglia), Essex and Suffolk Water SES Water, South East Water, South West Water (Bournemouth area)
	2	Potentially water stressed: Cambridge Water, Portsmouth Water, Wessex Water, Severn Trent Water, South Staffs Water South West Water (Scilly Isles)
	3	Not water stressed: Bristol Water, Northumbrian Water, Yorkshire Water, United Utilities, South West Water (Devon and Cornwall), Welsh Water, Anglian Water (Hartlepool) Hafren Dyfrdwy (formerley Dee Valley Water)
	4	Don't know
SINGLE CODE Q3. Does your household have a water meter?	1	Yes
	2	No
	3	Don't know



Water Resources - questionnaire (2 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
Q4. To what extent do you think the area where you live has limited water resources? SINGLE CODE Pressure on water resources occurs when people and businesses use a large proportion of the water that is available in the environment (in rivers, lakes/reservoirs and stored underground in aquifers). High demand for water from households and businesses can put water sources under strain and can affect the natural water environment and the wildlife that depends on it.	1	To a great extent
	2	To a small extent
	3	Not affected at all - there is plenty of water
	4	Don't know
ASK ALL SELECTING CODES 1-3 AT Q4. SINGLE CODE Q5. You said that the area where you live has limited water resources [if code 1 at code Q 4 = to a great extent, code 2 = to a small extent], which ONE of the following are reasons for that? [If code 3 at Q4] You said that the area where you live has plenty of water, which ONE of the following are reasons for that?	1	I've noticed dried up streams, low river levels or other evidence of these issues in my local area
	2	It rains/floods a lot in my area
	3	My water company fitted a water meter for my home because of local water resource issues
	4	I've seen messages from my water company asking people to use less water
	5	Heard it from my water company
	6	Heard it from somewhere other than my water company (specify):
	7	I've been affected by a hosepipe ban
	8	It's not something that I really know about
	9	Other - specify



Water Resources - questionnaire (3 of 11)

Question	Answer code	Answer option
<p><u>If respondent is in England:</u> Several parts of England are classed as being in 'serious water stress'. These are mainly in the south and east of England, although the Government is considering extending the area of serious water stress to include parts of the west of England and the Midlands.</p> <p><u>If respondent is in Wales:</u> Much of Wales is predicted to have reasonable levels of water resources. Only 3% of Wales's rain is captured for public water supply and with limited water stored in the ground the level of water available could change in the future. Some parts of Wales have been identified as having potential water resources issues including Pembrokeshire and Tywyn Aberdyfi areas.</p> <p>ASK RESPONDENTS WHO PAY FOR WATER BILL Q6. If you knew that you lived in an area where water resources were under pressure, and there was a risk in the future of more hosepipe bans and restrictions on water use, what would you expect your water company to do to help manage this situation? (Rank in order of preference)</p>	1	Ask people and also help them to use less water with water saving tips and practical advice
	2	Fit more water meters so that people know how much they use and pay accordingly
	3	Fix more leaks, more quickly
	4	Get more water e.g. build reservoirs, transfer water from areas that have more water to go around
	5	Engage with local communities to help them use less water and give them incentives like free swimming lessons for school children if they do
	6	Charge more for households that use a lot more water than other similar sized households
	7	Reward households that save water with a special discount off their bill

Water Resources - questionnaire (4 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
<p>ASK RESPONDENTS WHO PAY FOR WATER BILL MULTI CODE Q7. Have you heard of your water company doing any of the following things?</p>	1	Ask people and also help them to use less water with water saving tips and practical advice
	2	Fitting more water meters so that people know how much they use and pay accordingly
	3	Fixing more leaks, more quickly
	4	Getting more water e.g. build reservoirs, transfer water from areas that have more water to go around
	5	Engaging with local communities to help them use less water and give them incentives like free swimming lessons for school children if they do
	6	Charge more for households that use a lot more water than other similar sized households
	7	Rewarding households that save water with a special discount off their bill
	8	None of these



Water Resources - questionnaire (5 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
<p>ASK RESPONDENTS WHO PAY FOR WATER BILL SINGLE CODE Q8. If you lived in an area with limited water resources, what would you be likely or unlikely to do to help?</p> <p>1. Very likely 2. Fairly likely 3. Not very likely 4. Not at all likely</p>	1	Fit a water meter for free and let me try it to see if it saves me money/helps me use less [ONLY SHOW RESPONDENTS WHO DO NOT HAVE A WATER METER]
	2	Change my habits to use less water
	3	Fit water saving devices e.g., water butts, bricks to reduce the amount of water flushed in toilets, water saving showerheads
	4	Read information from my water company about local water resources, what they are doing and what they want people to do before I decide what to do
	5	Make sure there were no leaks from the pipework I am responsible for at my property
	6	6Use less water in return for a special discount off my bill
	7	Accept a local community challenge where we all try to use less water in return for a community reward if we succeed e.g., free swimming lessons for local primary school children
	8	Send me information about - please specify
	9	Nothing [exclude]



Water Resources - questionnaire (6 of 11)



The voice for water consumers
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Question	Answer code	Answer option
<p>ASK ALL WHO EXCEPT THOSE WHO SAID NOTHING AT Q8 MULTI CODE Q9. Which, if any, of the following could your water company do to help you to change your behavior to reduce your water use? Select all that apply.</p>	1	Fit a water meter for free and let me try it to see if it saves me money/helps me use less [ONLY SHOW RESPONDENTS WHO DO NOT HAVE A WATER METER]
	2	Free visit to my home to give me tailored advice on how to use less water
	3	Offer free or discounted water saving devices e.g., water butts, bricks to reduce the amount of water flushed in toilets, water saving showerheads
	4	Send me information about local water resources, what they are doing and what they want people to do before I decide what to do
	5	Free visit to check my home and supply pipe for leaks
	6	Offer a special discount off my bill if I use less water
	7	Organise a local community challenge to use less water in return for a community reward e.g., free swimming lessons for children
	8	Send me information about - please specify
	9	Nothing [exclude]



Water Resources - questionnaire (7 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
ASK RESPONDENTS WHO PAY FOR WATER BILL SINGLE CODE Q10. In the last year, have you seen any water saving tips on social media? EG Twitter, Facebook, Instagram or anywhere else online?	1	Yes
	2	No
	3	Don't know
IF YES AT Q10 Q11. What can you recall about this? EG. What organisation did it come from and what did it suggest doing?	1	TEXT BOX
IF YES AT Q10 SINGLE CODE Q12. Are you doing anything different in how you use water after seeing water saving tips on social media?	1	Yes
	2	No
	3	Don't know
ASK IF YES AT Q12 Q13. Please tell us what you are doing differently as a result of seeing water saving tips on social media. OPEN TEXT BOX	1	TEXT BOX



Water Resources - questionnaire (8 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
ASK RESPONDENTS WHO PAY FOR WATER BILL Q14. If your water company needs to get in touch about something important – for example about ways to reduce your water bill, a leak in your pipes, or problems with your water supply – what’s the best way to make sure you notice this information? Rank top 3	1	Write a letter
	2	Email
	3	Text
	4	WhatsApp
	5	Social media
	6	Company website
	7	Broadcast it – TV/radio/other



Water Resources - questionnaire (9 of 11)

Question	Answer code	Answer option
<p>The next few questions are about what water companies can do to help customers who have a leak from the water supply pipe at their property. The water supply pipe goes from the boundary of the property into the house. The householder is responsible for the maintenance of the water supply pipework which is on their property.</p> <p>ASK RESPONDENTS WHO PAY FOR WATER BILL SINGLE CODE Q15. Water companies, at their discretion, offer various ways to help customers who find they have a leak in this pipe. Which would you prefer your water company to offer? (select 1)</p>	1	Repair the first leak for free and show me how to check for leaks in future
	2	Give me a list of approved plumbers/contractors to call to find and repair the leak at my cost
	3	If the pipe needs replacing, offer to pay for part of the costs (costs could amount to several hundreds of pounds)
	4	Offer comprehensive help but only to people in vulnerable circumstances such as those living with long-term health conditions or difficulty in paying their water bill
	5	None of these - I'd rather choose who does the work and pay for it (either myself or through my insurance provider) to make sure it is done to the standard I expect

Water Resources - questionnaire (10 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
<p>ASK RESPONDENTS WHO PAY FOR WATER BILL SINGLE CODE Q16. To what extent do you agree or disagree that every water company should offer the same help to all customers with leaks on customer water supply pipes? This would mean that where someone lived wouldn't make a difference to the help they could get.</p>	1	Strongly agree that help should be the same everywhere
	2	Tend to agree
	3	Neither agree nor disagree
	4	Tend to disagree
	5	Strongly disagree - each company should decide its own approach
	6	Don't know
<p>ASK RESPONDENTS WHO PAY FOR WATER BILL SINGLE CODE Q17. Some water companies offer more help than others. For example, help can be sending a list of approved plumbers/contractors to repairing the first leak free, or offering part payment towards the repair or replacing the old pipe with a new pipe. If help was the same across England and Wales there would be winners and losers. For example, if the help provided was sending a list of plumbers this would be a lower level of help for many customers, or if it was a free repair this would be an improvement for many customers.</p> <p>With this in mind, to what extent do you agree or disagree that every water company should offer the same help with leaks on customer water supply pipes?</p>	1	Strongly agree that help should be the same everywhere
	2	Tend to agree
	3	Neither agree nor disagree
	4	Tend to disagree
	5	Strongly disagree - each company should decide its own approach
	6	Don't know



Water Resources - questionnaire (11 of 11)



The voice for water consumers
Llais defnyddwyr dŵr

Question	Answer code	Answer option
ASK ALL SELECTED CODED 1-5 AT Q17 SINGLE CODE Q18. You said that you [enter respondent answer from Q17] that every water company should offer the same help with leaks on customer water supply pipes. Which ONE of the following is your reason for this?	1	I might lose out
	2	I might get a better deal
	3	I'd rather see companies offer the same but high level of help but just for people in vulnerable circumstances
	4	I'd prefer to sort out and pay for the repair myself to get the standard of work I expect
	5	Only if they offer the higher levels of help - I'd be prepared to pay a bit more on my bill for this
	6	Something else - please specify



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